



# CRM

For  
Construction Suppliers  
Contractors  
Engineers  
Architects



### AVL Systems - Head of Marketing

"Although a good CRM, Salesforce was not "the best" CRM for our company. After extensive research, we decided to go with Project-SalesAchiever and I don't think that we could have made a better choice. Not only has Project-SalesAchiever CRM met ALL of our needs, but the staff at Project-SalesAchiever has constantly delivered excellent customer service. For companies that are project-based, such as those in the construction industry and ourselves, Project-SalesAchiever CRM is the #1 CRM option available today.

Project-SalesAchiever CRM is specifically designed to manage the complex sales process around the Construction Industry. Whether Architect, Engineer, Contractor or Product Supplier, Project-SalesAchiever CRM is both powerful and easy to use.

Project-SalesAchiever CRM software gives companies in the construction industry an affordable solution that is simple to use and quick to deploy.

It combines all the features you would expect from a powerful CRM package and also includes the powerful activity and project business lead management.

Project-SalesAchiever CRM takes company, contact, activity and project information and translates it to meaningful information, to empower your teams to begin and manage the business development process from rumor to order in the marketplace.

### Project-SalesAchiever - Key Features

- Time management & scheduling for all users, Microsoft Outlook Calendar and Service Scheduling Calendar
- Powerful Quotation and Estimate management
- Unlimited configuration capabilities
- Easy control of who sees which records, fields and what they can do to them
- Project opportunity management - pipeline & forecasts
- Powerful reports, list managers & InfoSearch™ gives instant access to key information
- Workflow and email alerts



## Your Outlook in Project-SalesAchiever CRM

The screenshot shows the Outlook calendar interface with a meeting titled "Meet Ron Re 2 Proposals" scheduled for Friday, 10/17/2014, from 11:30 AM to 12:00 PM. The appointment window is open, showing the subject, location, and start/end times. The text in the appointment window reads: "Ron has had 2 proposals from us regarding the Holiday Inn Project, we need to touch base and get the goahead on this." Below the appointment window, the Project-SalesAchiever CRM interface is visible, showing fields for Company (390 Architects inc), Contact (Ron Gans), and Project. A "Select a Project to link to" dialog box is also open, displaying a list of projects with columns for Project Name, Town/City, and County. The "Holiday Inn Hotel" project is selected.

There are some things in our business we don't want to change if we don't have to. Our Microsoft Outlook Calendar is one of them.

Project-SalesAchiever CRM embeds your personal Microsoft Outlook calendar inside Project-SalesAchiever. Your action record in Microsoft Outlook is then given full functionality from Project-SalesAchiever to link your actions to Projects, Companies, Contacts and Quotations if required.

The screenshot shows the Outlook email interface. On the left, the "Email Details" pane shows the email status as "Not Sent" and the start date as "Monday, October 20, 2014". The main window shows the "Compose" or "View" screen for an email. The "To" field is populated with "aferro@360inc.com". The "From" field shows "aferro@360inc.com". The "Subject" field is empty. The "Description" field shows "360 Inc.". The "Company" field shows "360 Inc.". The "Contact" field shows "Mr Ron Gans". The "Project" field shows "Metro Bank Park Phase 2".

Email can also be sent and received through the Project-SalesAchiever CRM solution.

## The Company Record

The Company Record configuration can be out of the box or completely personalized to meet your needs. Simple or sophisticated, in the Cloud or on premise, mobile or in the office, it's your choice.

The Company Record here is set up to be easy to use, with minimal data entry requirements.

The screenshot displays the 'Company Record' for '390 Inc.' in the CRM. The interface includes a navigation menu (Overview, News, Information, History, Contacts, Projects, Reports) and a main content area with several sections:

- Name:** 390 Design and Build
- Address:** 245 High Street
- Location:** Banbury, Oxfordshire, OX16 5JJ, United Kingdom, Midlands
- Telephone, Fax & Web:** 1-800-915-3597
- Company Type:** Contractor
- Projects:** A table listing various projects with columns for Role, Title, Site City, Lead Status, Market, Project Value, Value to Us, First Name, and Last name.
- Record Details:** Information about the record's creation and editing.
- Company Details:** A sidebar showing news articles related to the company, such as 'Works by 390 inc and David Messon listed by architecture...' and 'Ready to splash out? \$100 on an apartment...'.

A green callout box at the bottom of the screenshot reads: "Latest information on your customer from Google News".

Easy to switch on more functionality if needed.

The screenshot displays the 'Opportunity' module for '360 Inc.' in the CRM. The interface includes a navigation menu (Overview, News, Information, Notes, Lists, History, Contacts, Projects, Quotes, Opportunities, Companies, Rates, Rights, Reports, Business Units, Auditing) and a main content area with a table of opportunities:

Description	Value	Service Type	Project Status	Title	First Name	Last name
Architectural	\$185,000	Design	6. Won	Mr	Ron	Gans
Construction Products	\$240,000	Design	3. Estimating	Mr	Mike	Reed
Contracting Services	\$1,825,000	Design	3. Estimating	Mr	Mike	Reed

Buttons for 'Profile', 'Re-Subscribe', 'OK', and 'Cancel' are visible at the bottom of the window.

Win more business against every project with the opportunity feature in Project -SalesAchiever. The opportunity module feature can be useful if more than one piece of business can be won or lost against any single project.

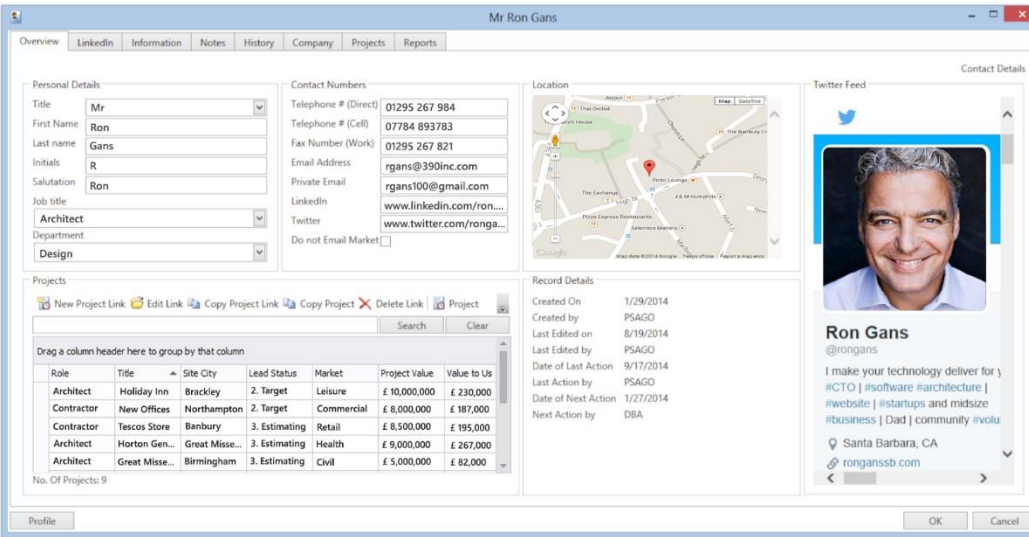


## Contact Management

Your initial overview of a contact will give you more information in an instant, to enable you to engage your customers more effectively.

When you look at the information from a customer centric perspective, you can see associated projects, company, actions as well as their social networking activities.

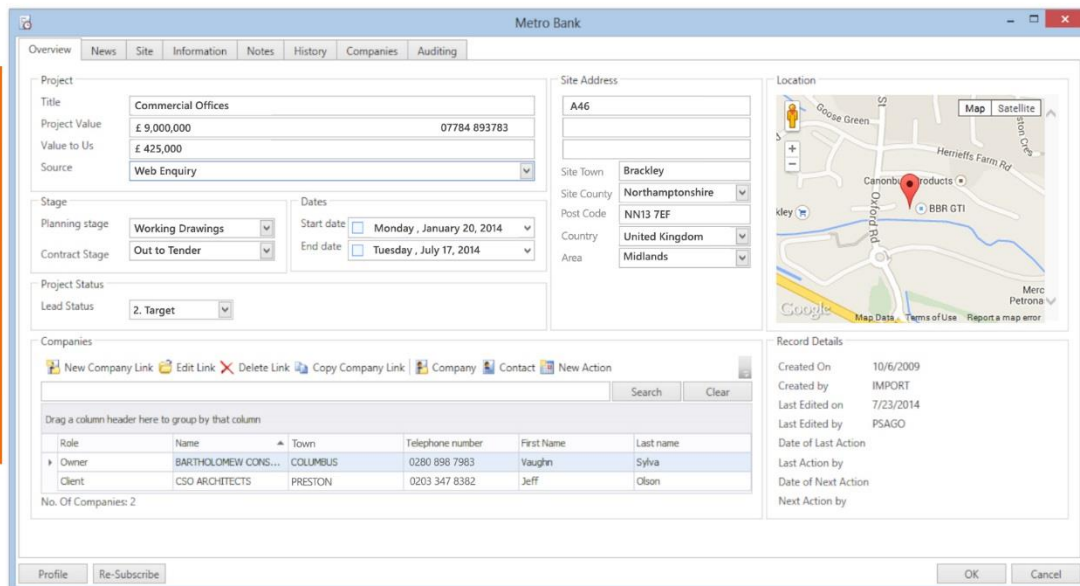
Many companies have this 'data' in their business, although it is held in separate systems, different departments and never allowing you to see a holistic view of your contacts. Project-SalesAchiever brings all the data together ensuring users see more opportunities, enabling them to sell more effectively and deliver a better service to the customer.



When you speak to a contact in the construction sector, there is so much we need to know to enable us be professional and deliver a service that will give us a competitive edge. We not only need to see all actions but associated projects, social activity and much more.

## Project Lead Tracking

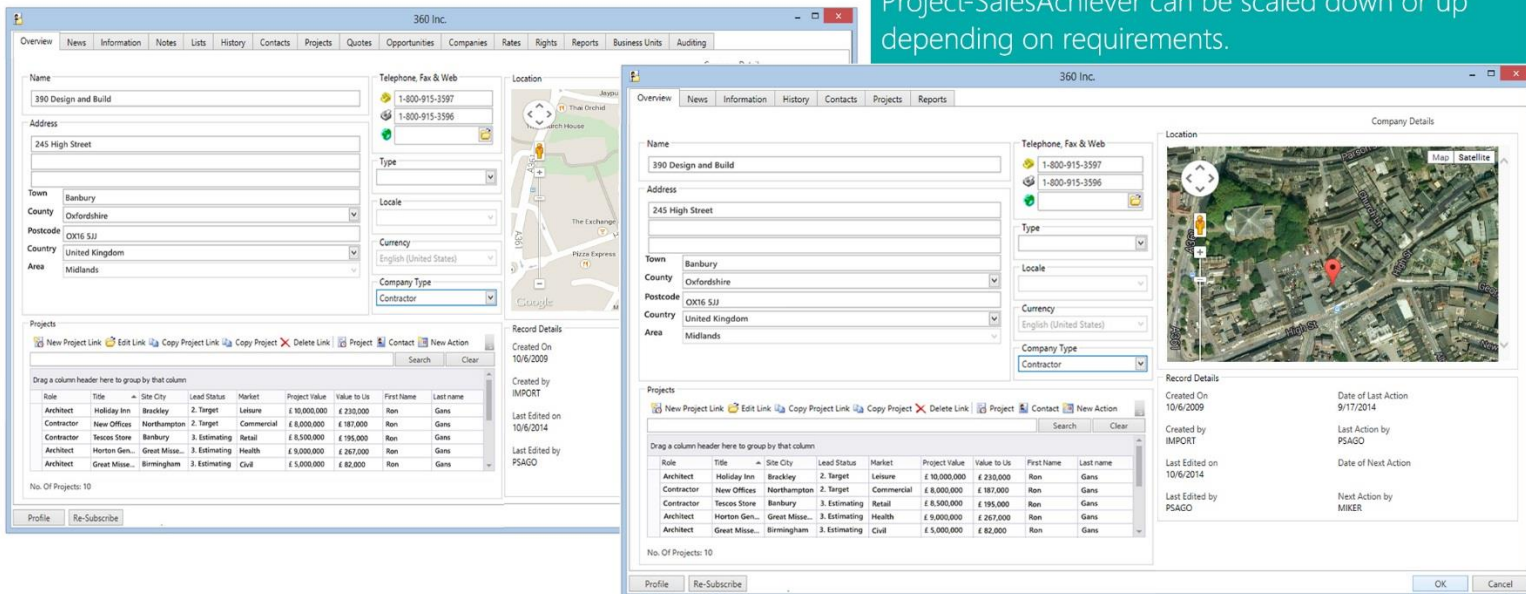
A project centric approach is needed when companies need to co-ordinate successful selling activity around projects when there may be many contacts, companies, quotations, documentation that all needs tracking to a successful conclusion.



Seamless Integration with Construction Lead Data such as Dodge, Reed, BCI, Glenigan, ABI and CIS

## Scalability and Customisation

Any field or tab can easily be related. Project-SalesAchiever can be scaled down or up depending on requirements.



## Customisable Dashboards

Dashboard release enables more flexible report writing, where companies using Project-SalesAchiever can present data from just Project-SalesAchiever CRM or collectively from additional solutions such as ERP software.



### Personal Dashboard - Mike Davies

- 4**  
Appointments next 7 days
- 32**  
Phone calls next 7 days
- 18**  
Number of Projects with next actions by me
- 14**  
Number of projects won, owned by me YTD
- 17**  
Projects owned by me forecasted to win this year

**Jan 31 2014**

**Today's actions**

Wednesday March 14, 2014  
 9.00am - Appointment - **360 Inc. Construction**  
 Meeting with Mike - Metro Bank Project

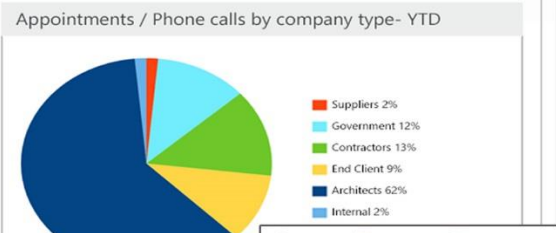
10.30am - Appointment - **Amidex Architects**  
 Meeting with Stuart Hall - Munro Detention Center

2.30pm - Telephone Call - **X2V Architects**  
 Call Rick Martin - Metro Bank Project

3.00pm - Appointment - **Jarvis Architects**  
 Meeting with Megan Taylor - University Project

4.30pm - Telephone Call - **Davis Healthcare**  
 Call Mike Roberts - New Out Patients Center

4.45pm - Telephone Call - **360 Inc. Construction**  
 Call Sarah Davidson - New Apartment Complex



Management reports for all users at anytime. Dashboard reports can be configured to any company or individual user's requirements. Giving you an instant picture of where we are to date.

Open List | Create List | List Properties | Refresh | Delete List | Set Default List

- ▶ **Actions**
- ▶ **Companies**
  - \* All My Companies
  - Accounts - Where bid and Lost
  - All A Accounts
  - All Accounts
  - All Accounts Linked to 'Tracking' projects
  - All Accounts Overdue for a Call
  - All Accounts With Actions for This Week
  - All Accounts With Planned Actions for Next Week
  - All Architects
  - All B Accounts
  - All Clients
  - All Consultants
  - All Contractors
  - All Suppliers
  - DUPLICATE SUSPECTS
  - MARKETING - IFMA List
  - MY FAVOURITES
- ▶ **Contacts**
- ▶ **Projects**
  - \* All My Projects
  - 1. Projects At Pre-Qualified Stage
  - 1. Julians Top Project to Qualify
  - 2. Projects At Target Stage
  - 3. Projects At Estimating Stage
  - 4. Projects at Estimate Submitted Stage
  - 5. Projects - Bids Rejected/Lost
  - 6. Projects - Won
  - All Office Buildings

**Project-SalesAchiever List Manager**  
 Any user, if assigned the rights, can write and store their own reports within the CRM through the unique Project-SalesAchiever List Manager. Your list and reports can be shared or kept private. The List manager can be used to drive E-Blasts, manage project pipelines, manage key accounts and more.

UNITED STATES  
1635 Foxtrail Drive #352  
Loveland, CO 80538  
United States  
1-800-915-3597

CANADA  
1959 Upper Water Street  
Suite 1700  
Halifax, Nova Scotia  
B3J 3N2  
Canada  
1-800-915-3597

UNITED KINGDOM  
Bloxham Mill Business Centre  
Barford Road  
Bloxham, Banbury  
Oxfordshire, OX15 4FF  
United Kingdom  
44-800-242-5119

HOLLAND  
Singel 540  
1017 AZ Amsterdam  
The Netherlands  
31-20-894-1373



Call us today on 1 800 915 3597 for Free Demonstraton