TheHunleyGroup

SALESFORCE AE / SE PLAYBOOK

Construction ARCHITECTS & ENGINEERS

In this Playbook, you will find:

- An Industry Overview
- Key Personas
- Account Targeting
- Pitch Messaging, with ROI Examples
- Discovery Questions
- Likely Cloud ACV Opportunities

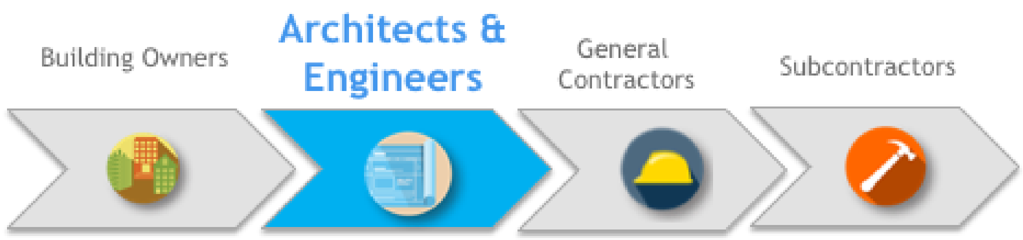
Questions? Contact:

Aaron Ayer, CEO
aaron@thehunleygroup.com
M: (704) 582-9557

Rob Hansen, Solution Architect
rhansen@thehunleygroup.com
M: (231)632-5399

Industry Overview

Architects and engineers (the A and E in A-E-C), also known as "designers" or "consultants", are professional service partners responsible for the design of construction projects. Architects design spaces, looks, and user experience; engineers focus on structure, systems, and functionality. They produce the written specifications and CAD drawings (blueprints) or 3D drawings (BIM – Building Information Management) that define how the project will be constructed. Architects typically have the leadership role on commercial projects, with engineers either serving them or forming a department within the overall firm. On industrial and infrastructure projects, Engineers generally take the lead, with a prime consultant potentially leading with a number of sub-consultants. Architects and engineers are most likely to be a Sales Cloud play for Salesforce, at least initially.



They work for clients who want to build buildings, facilities, or other structures. These may be building owners (who may have their own department to manage construction, or rely on Owners Reps / Project Managers / Program Managers to oversee the process), government entities, or design-build companies. They may work on **commercial** (buildings that aren't single family residential – e.g. high rise buildings, hospitals, schools, etc.), **industrial** (plants, manufacturing, power stations etc.) or **heavy construction/civil/infrastructure** projects (roads, bridges, water, power lines, etc. – structures that aren't buildings / "linear construction" as opposed to "vertical construction"), or occasionally a combination. Design firms tend to focus on certain types of clients or types of buildings, each with their own characteristics and needs, and the designer needs to be able to produce designs that offer value for clients – usability, low maintenance, and possibly even delight.

<u>Examples of types of A&E and other consultants in this industry:</u>

Executive Architect	HVAC/MEP/M&E Engineer	Structural Engineer
Design Architect	Mechanical Engineer	Civil Engineer
Landscape Architect	Electrical Engineer	Geotechnical Engineer
Planner	Plumbing Engineer	Marine Engineer
Quantity Surveyor	Fire Protection Engineer	Highway Engineer
Program Manager	Vertical Transportation Engineer	Environmental Engineer
Traffic Consultant	Acoustic Engineer	Curtain Wall Engineer

There has been a lot of **consolidation** in the industry for the past decade or so – in an industry that was formerly more local and specialized, larger consultants are emerging that may have multiple disciplines (that may include both architecture and engineering, or many types of engineers), and operate regionally or even globally. Many engineering firms have also expanded into construction, giving them design-build capabilities (e.g the company does the engineering design/blueprints for a roadway or other project, and also manages or potentially performs its construction). Many of these businesses are a real mashup, and may cross between A&E, construction, subcontracting, even manufacturing. Make sure you characterize the firm appropriately, and ask for help if it's muddy to you; it can be tough.

This is a **highly cyclical** industry – in downturns, companies tend to avoid large construction projects and focus their investments elsewhere. When market turns downwards, they're really going to want to be organized in BD to make sure they don't lose any deals – at that time it's critical to be on top of every possible project. In bubbly markets, it's a lot easier to win work and there are a lot more deals around, so it's a lot easier to lose track – however there may be capacity limitations that mean companies can't take on all the work they're offered.

A "lead" is a (design) project that they want to get involved in, and an RFQ/RFP hasn't yet been issued by the client. It's not a person or a company, and if you assume the Leads object in Salesforce will work, you'll confuse whoever you're speaking with. Most A&E will hear about leads from their contacts; it's very much a relationship-driven industry.

Key Personas

Titles vary – here are some examples

- Managing Partner; Principal; Vice President; Practice Area Leader – these roles lead offices or groups in the company. They may have a focus in a particular type of design. Management of key relationships will be an important part of their role, and they generally oversee the BD process for their group
- Studio Leader/Manager; Design Director/Manager – these roles manage teams of designers over multiple projects. They often focus in a particular type of design. They may bring in some leads due to relationships
- Architect; Engineer (may have Senior or Associate title if they have more experience) – these roles do the actual design. They might spent some time on project jobsites (more likely with some types of engineers)
- Marketing titles don't have the same role as others with the same title in other industries. They may have a BD role, managing leads that have been brought in by the company. They often focus on designing and managing proposals and presentations for prospects (most companies use Adobe InDesign for these documents). They may be involved in managing events, and some email campaigns (because the industry is very relationship-driven, email campaigns are often limited), and keeping the website relevant (it's usually relatively rare to get leads directly from the website)
- Project Managers implement projects, interfacing with designers, leading internal project teams, managing the project schedule, deliverables, and finance/profitability, and communicating with clients. They are often involved in BD, putting together proposals alongside Marketing and negotiating agreements. They may work on a single large project, or multiple projects.

Usual Suspect Competition

- Spreadsheets
- Deltek Vision or another Deltek product (e.g. Costpoint)
  - CRM element of industry-specific ERP system
  - Generally on prem, usability issues, limited mobile functionality
- Cosential
  - AEC (Architecture, Engineering, Construction) specific
  - See Hunley resource center for Salesforce vs. Cosential comparison
- CRM from ERP

Account Targeting

- SIC codes
  - 8712: Architectural Services (primary category)
    - 0781: Landscape Counseling and Planning (landscape architects)
  - 8711: Engineering Services
- NAICS codes
  - 541310: Architectural Services (primary category)
    - 541320: Landscape Architectural Services (landscape architects)
  - 541330: Engineering Services

Key Pitch Messages

- Don’t lose track of leads, make sure they’re followed up on”
  - When you’ve got a lot to do, sometimes things slip through the cracks – with Salesforce you can get reminders of action items and see what you need to focus on get on and win a higher % of RFQs/RFPs
  - With Salesforce, you don’t have to manually update spreadsheets and wait until they’re completely updated to see all your data. The information is kept up to date as each project proceeds and you can get up-to-date reports at any time
  - Manage RFPs to make sure you make a good impression on owners/decision makers higher likelihood of winning
  - See trends in your pipeline including # opportunities at each stage, win/loss rates, winning competitors, etc. have a leading indicator to market inflections
- “Gain visibility into relationships across your whole company”

- For future, current, and past projects, track the owner, other consultants, GCs/CMs, and others involved. For each firm, gain visibility into which projects you've worked with them on, and if you want to work with them again
    - Use this data to find the right people to make introductions □ higher % of projects going to RFP
    - See which people you haven't talked to in a while, so you can maintain relationships with decision makers □ higher likelihood your proposal will be considered
- "Track who's done what"
    - For future, current, and past projects, track the people/staff who were involved at your company
    - Gain visibility into who's worked with owners, other consultants, and others in the past
    - Decide who to put forward on projects based on experience and relationships □ higher likelihood of winning
    - Track training, certifications, and more for each employee
- "See all your data real-time while you're out and about"
    - In Salesforce, everyone can have access to the latest information on the owners and firms you work with, people in those companies, relationships, and leads/RFPs/projects you're working on
    - Call or email people without scrambling to find their contact details – easily find their addresses on your phone to navigate to them □ save time

Discovery Questions

1. What's your primary focus – residential, commercial, industrial, or heavy/infrastructure construction? (note – you should be able to get a good idea about this from their website)
2. What type of projects do you mostly work on? (note – you should be able to get a good idea about this from their website, but sometimes they promote an area they'd like to get into vs. current specialty)
    a. (e.g. healthcare, multi-family residential, fitouts/interiors, marine construction)
3. What divisions/business units/practice areas do you have?
    a. (often geographically based, could also be focused on a specialty)
    b. What are the relative sizes of these divisions?
    c. (if construction is also a service) What % of revenue comes from design vs. construction? (note – also see playbook for General Contractors for construction-specific questions)
4. What % of your work is with public vs. private owners?
5. What % of your work is with existing clients?
6. Describe the internal people involved in the business development process
    a. What are their roles?
    b. What are their average ages and how much technology do they currently use?
    c. How much time do they spend in the field / mobile, versus time at their desk?

    d. How standardized are your sales processes? Is that something you want to change?
    e. How do you track dates and actions for putting together proposals and/or statements of qualification (SOQs)?
7. (if they have multiple focuses) How do you do business development across geographies and across services? Do you do any cross-selling?
8. When do you first hear about projects?
    a. (e.g. project conception, budgeted, RFQ/RFP)
    b. Who typically hears about them first?
9. What contractual relationships do you usually work with?
    a. Who do you have a contract with?
    b. At what stage are you brought in?
    c. Are you usually the prime consultant, or sub-consultant, or "it depends"? (mostly a question for engineers)
10. How do you qualify leads and decide to pursue projects?
    a. Do you have a qualification / Go/No-Go process to approve pursuit of projects? What is the process?
    b. At what stage(s) do you make the decision?
    c. Do you need to overview current and future projects to see workload and availability of resources? How do you do that currently?
11. What are the steps/stages you go through to win a project?
    a. (e.g. hearing about a lead, putting together team of consultants, getting invited to RFQ/RFP, statement of qualification (SOQ) or proposal, negotiation, win/lose)
    b. What documents are you asked for / do you send out during a pursuit, and what's included in them?
    c. How do you put together you statement of qualification / proposal documents for clients? What tool do you use for these documents (e.g. InDesign)
12. In the business development process, who do you interact with?
    a. E.g. owner, owner's rep, financial consultant, architect, engineer, management company, tenant
    b. Do you have account plans / pursuit plans for owners/clients and for any other partners? What's in the plan, and how do you manage it?
    c. Do you know your profitability by client?
13. How do you track relationships?
    a. How do you track individuals at owners/architects/engineers etc. to see where you've worked with them in the past? Who in your team has relationships with them?
    b. How do you track decision makers or influencers who might not be fans of your company, so you can focus on winning them over?
14. How do you track business development?
    a. How do you track early-stage projects to make sure you get invited to RFQ/RFP?
    b. If you've got multiple people involved, how do you all know what conversations have happened?

    c. How do you manage proposals/bidding?
    d. How do you track your competition?
    e. How do you keep track of potential risks on a project?
    f. How do you keep track of projects you've won, lost, or declined?
15. What's your typical pipeline?
    a. How many new projects do you hear about each year?
    b. How many do you get invited to RFQ/RFP?
    c. How many do you win?
    d. What would you say are your average earnings on a project? (how much the owner's paying you to do the project)
16. What data do you need when you're out and about?
    a. When you're on the road, how do you find out information on the people in the company you're visiting/talking to? And who in your organization has worked with someone there before?
    b. How do you find contact information when you're out and about and want to get in touch with someone?
17. What does your marketing team do?
    a. How do you gather information for bios and projects to put in proposals?
    b. How do you track events? (e.g. golf outings, conferences)
    c. Do you have any external email campaigns to owners etc.?
    d. Do you do surveys?
    e. How do you handle internal mass communications?
18. Would it be useful for you to track buildings/facilities/properties you've done multiple projects on, so you can store centralized data and see all those related projects from one place?
19. What software platforms do you already have in place?
    a. What ERP/Project Management/Finance systems do you use?
        i. What companies/product(s)? (e.g. Deltek Viewpoint, Deltek Costpoint)
        ii. Which features do you use?
        iii. On prem or cloud?
        iv. If on prem, when was it last updated?
        v. Would it be useful to have an integration? What would the data flow be?
    b. What do you currently use for Business Development and Marketing / CRM?
    c. What do you use for email?
20. How do you handle submittals, RFIs, change order requests, etc.?
21. How do you track contracts, certificates of insurance (COI), etc.?
22. How do you manage employee/staff tracking and training?
    a. How do you track where your project managers, architects/engineers, and others are working?
    b. How do you track the history of where people have worked?
    c. How do you handle HR/training/learning management?

sales cloud • Sales Cloud • Salesforce Inbox for people on the road • Quip for account planning	pardot • Less of a priority – focus of most A&E is relationships, with some focused email campaigns	community cloud • Maybe – E.g. employee community for tracking placement, experience, training; clients, partners	CPQ • Unlikely – this is professional services and pricing is more likely to be tied to PSA
service cloud • Extremely unlikely for pure A&E – focus is on long-term relationships, not service transactions • Possible if they have a blend of services	marketing cloud • Unlikely (per Pardot), except possibly social platforms	analytics cloud • Long shot, usually a later phase rather than initial rollout	app cloud • Good fit for processes such as Certificate of Insurance tracking, inspections, intern tracking, etc.

23. Are there other processes currently being done on spreadsheets and forms, that might be considered to put in a mobile-friendly/online interface? (e.g. HR, IT, inspections, concrete testing, new vendor requests and approvals, travel requests and approvals, new/terminated employee notifications, accident & incident reporting, etc.)
24. How's your data quality?
25. What BD and other reporting would you like to see?

Positioning Clouds Correctly for Them

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aaron@thehunleygroup.com
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rhansen@thehunleygroup.com
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