



SALESFORCE AE / SE PLAYBOOK

Construction GENERAL CONTRACTORS AND CONSTRUCTION MANAGERS

In this Playbook, you will find:

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

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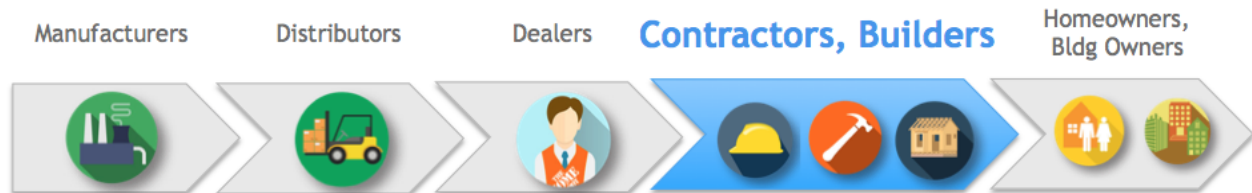
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Industry Overview

General Contractors and Construction Management companies manage the construction project, which generally includes managing subcontractors. Think of these companies as professional services with a twist. They are most likely to be a Sales Cloud play for Salesforce.



A company working on really large projects (around \$100m+, not just local) where they usually get a fee instead of a lump sum will more often describe themselves as **Construction Managers**. There aren't many of these – most others are called **General Contractors (GCs)**.

They may work on **commercial construction** (buildings that aren't single family residential – e.g. high rise buildings, hospitals, schools, etc.), **industrial construction** (plants, manufacturing, power stations etc.) or **heavy construction/civil/infrastructure** (roads, bridges, water, power lines, etc. – structures that aren't buildings), or occasionally a combination. The way they operate will be somewhat different depending on whether they're focusing on commercial, industrial, or heavy. Some GCs/CMs also have a development arm, or manage equipment, or some other focus, which will each have a different way of operating.

A "lead" is a construction project that they want to get involved in, and an RFQ/RFP hasn't yet been issued. 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. Larger/more established GCs/CMs will hear about leads from their contacts; others may use lead sources such as Dodge and CMD.

Key Personas and their Environment

- In a large company, there are usually **divisions/businesses** for different geographical areas or specialties. These are run by people with titles like **Vice President** or **General Manager**
- They're usually in charge of all the business in their area, from business development to construction
- Construction is often a small world, with a limited number of **architects*** (commercial and sometimes industrial only – don't mention architects to heavy/civil GCs), **engineers**, **owners** and others that the GC will talk to in the sales process. In most cases the VP/GM in charge of a division will know a lot of these people and network with them heavily

- In many cases the GC/CM will have a **business development manager** or team to help them respond to RFPs and put documentation together. In many cases, these teams don't handle the full sales process as VP/GMs are heavily involved
- The **estimating** and **preconstruction** teams help get the project ready before it's built; they're usually involved during bidding. Estimating is generally done using industry-specific point solutions and networks, and is heavily reliant on chasing subcontractor pricing. After bidding, preconstruction will continue for large projects and **purchasing** will get involved – they usually use industry point solutions that handle bids and contracts with multiple subcontractors
- The building work is done by the **operations** team – led in larger organizations by a **project executive** or similar title who covers several projects, and on site there are **project managers, engineers, and superintendents** (“supers”). They're on site for months or years – Field Service unlikely to be relevant. The process is extremely drawing-centered, with large numbers of large documents with constant updates and interactions related to those documents, and a move towards 3-D information (BIM – Building Information Modeling and VDC – Virtual Design and Construction). There are construction-focused point solutions such as Procore that are difficult for Salesforce to go up against at this level
- In most cases GCs won't do any actual building work; they bring in **subcontractors (“subs”)** to do the work. Note that some (usually smaller) GCs will also self-perform some works – they have field workers in a particular specialty (e.g. concrete construction) but subcontract other works. In a small number of organizations they'll sub out their inhouse teams to other GCs
- **Marketing** is very light at these firms. Someone with a “Marketing” title is usually mostly involved in putting together the long and complex proposals submitted in the RFP process (often created using Adobe InDesign), organizing photos and write-ups of projects, and getting bios for proposals. Most dollars for traditional marketing go to events/dinners, which are usually managed by the divisions. Email campaigns are rare, mostly because of the focus on long-term relationships
- **Finance** will generally use traditional ERPs with a construction focus, or construction ERPs such as CMiC, Deltek, and Viewpoint. There's a lot of complexity here – they're between owners and subs, managing finances with both, and managing retentions and warrantees
- **IT** is usually focused on ERP and project tools, not so much on sales. They're often protective of existing systems. Often not the best first contact

Account Targeting

- SIC codes
 - 1522 – General Contractors-Residential Buildings, Other Than Single-Family
 - 1541 – General Contractors-Industrial Buildings and Warehouses
 - 1542 – General Contractors-Nonresidential Buildings, Other than Industrial Buildings and Warehouses
 - 1611 – Highway and Street Construction, Except Elevated Highways

- 1622 – Bridge, Tunnel, and Elevated Highway Construction
- 1623 – Water, Sewer, Pipeline, and Communications and Power Line Construction
- 1629 – Heavy Construction, Not Elsewhere Classified
- NAICS codes
 - 236116 – New Multifamily Housing Construction (except For-Sale Builders)
 - 236210 – Industrial Building Construction
 - 236220 – Commercial and Institutional Building Construction
 - 237110 – Water and Sewer Line and Related Structures Construction
 - 237120 – Oil and Gas Pipeline and Related Structures Construction
 - 237130 – Power and Communication Line and Related Structures Construction
 - 237310 – Highway, Street, and Bridge Construction
 - 237990 – Other Heavy and Civil Engineering Construction

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 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 # projects 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, design team, and others involved. For each firm, gain visibility into which projects you’ve worked with them on
 - 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 instead of just used as a number to play off against the owner’s favorite GC
- “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, design team, 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 do you have?
 - a. (often geographically based, could also be focused on a specialty)
 - b. What are the relative sizes of these divisions?
4. (If heavy/civil/infrastructure) What % of your work is with public vs. private owners?
5. Describe the people involved in the business development process for me
 - 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 RFPs?
6. When do you first hear about projects?
 - a. (e.g. project conception, budgeted, early stage design, completed design, RFP)
 - b. Who typically hears about them first?
7. What’s your typical pipeline?
 - a. How many new projects do you hear about each year?
 - b. How many do you bid on / get invited to RFP?
 - c. How many do you win?
8. What types of contract do you usually work with?
 - a. (e.g. lump sum, cost plus, design build, management)
 - b. What would you say are your average earnings on a project? (how much the owner’s paying you to do the project)
9. In the business development process, who do you interact with?
 - a. E.g. owner, owner’s rep, architect*, engineer, management company, tenant
10. 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?
- 11. How do you track business development?
 - a. How do you track early-stage projects to make sure you get invited to RFP?
 - b. If you've got multiple people involved, how do you know what conversations have happened?
 - c. How do you manage proposals/bidding?
 - d. How do you track your competition?
 - e. What is your go/no go approval process for agreeing which projects to propose on and the amount you propose?
 - f. How do you keep track of potential risks on a project?
 - g. How do you keep track of projects you've won, lost, or declined?
- 12. 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?
- 13. 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?
 - c. Do you have any external email campaigns to owners, architects*, engineers etc.?
 - d. How do you handle subcontractor and internal mass communications?
- 14. How do you manage employee tracking and training?
 - a. How do you track where your project managers, 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?
- 15. What software platforms do you already have in place?
 - a. What ERP system do you use?
 - b. What do you currently use for Sales and Marketing?
 - c. What do you use for email?
 - d. What estimating tools do you use?
 - e. What procurement tools do you use?
 - f. What construction project management tools do you use? (Names that might come up include Procore, Viewpoint, COINS). Any pain points with the way you're managing data during the construction process?
 - g. Do you have any other processes you'd like to improve/put online? e.g. new vendor requests and approvals, travel requests and approvals, new/terminated employee notifications, accident & incident reporting, etc.

 sales cloud • <u>Sales Cloud</u> • <u>Salesforce Inbox</u> for people on the road	 pardot • Long shot – focus for most GCs is relationships	 community cloud • Maybe – E.g. employee community for tracking placement, experience, training	 CPQ • Extremely unlikely – industry-focused point solutions, reliance on subcontractor pricing
 service cloud • Long shot / possibly self-performers only	 marketing cloud • Extremely unlikely	 analytics cloud • Long shot	 app cloud • Good fit for processes such as new vendor requests, accident & incident reporting, etc.

Positioning Clouds Correctly for Them

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