



SALESFORCE AE / SE PLAYBOOK

Construction COMMERCIAL SUBCONTRACTORS

In this Playbook, you will find:

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

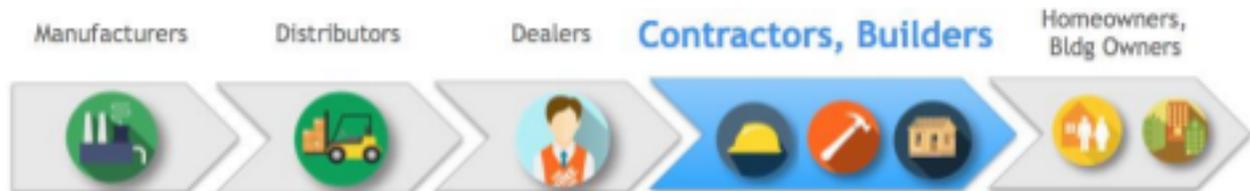
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Industry Overview

Commercial subcontractors are the “trades” who do the actual work on commercial construction projects (anything other than single-family homes). Electricians, plumbers, roofers, insulators, drywall, air conditioning specialists – there can be potentially a hundred different trades involved in a very large project.



They may work on **commercial construction** (buildings that aren't single family residential – e.g. high rise buildings, hospitals, schools, etc.), or **heavy construction/civil/infrastructure** (roads, bridges, water, power lines, etc. – structures that aren't buildings). The way they operate will be somewhat different depending on whether they're focusing on commercial or heavy.

For buildings, the “big 3” sub trades are the MEPs (Mechanical, Electrical, Plumbing). Typically, those are the ones large enough to warrant Salesforce pursuit. For heavy, it can vary, though concrete and paving contractors are big.

Most subcontractors are local or sub-regional – it's pretty rare to have them on a national level, unless they've got an unusual specialty that's difficult to get into / low competition. For example, it's common to see a sub who covers the Bay Area, but rare to see one who covers all of California or the Western States.

Key Personas

- In a large company, there may be **divisions/businesses** for different specialties (e.g. large construction, service) or geographical regions. These are run by people with titles like **Division Manager** or **Vice President**
- They're usually in charge of all the business in their area, from business development to construction. The key customers for a Sub are **general contractors (GCs) / construction management (CM)** in the commercial world, typically government entities in heavy.
- In some cases they'll have a **business development manager** or team to help them respond to RFPs and put documentation together. They may be central for the whole company, or specific to a division. But in other (usually smaller) cases the division manager and estimator (see below) do all the work BD will virtually always be a very small team, though.
- Construction is often a small world, with a limited number of GC / CM companies finding subs to work on their projects. A GC will usually divvy up the work in their preferred way, creating packages to send to subs, such as foundations, framing, walls, roof, electrical, mechanical, etc. etc.

The estimator at the GC might reach out while they're in the process of bidding a project so they get an idea of the cost, or the purchaser will reach out once they've won the project to tie down the cost. A GC will usually have a small collection of favored subs for each package of work, who they've worked with in the past and trust

- Also outside the subcontractor, **architects*** (commercial only – don't mention architects in relation to heavy construction), **engineers, owners** and others design the project (often before the GC is brought in) – in some cases for specialty trades, the designer may know subcontractors who are good at that work and give them a heads up to approach the GC. But mostly it's the GC who interacts with the subs, and rare that subs engage architects or engineers.
- The **estimator** at the sub puts together pricing, and the GC will get bids from a number of subs and pick the lowest or play subs against each other to get a good price/terms.
- The building work is done by the **construction** team – led in larger organizations by a **project executive** who covers several projects, and on site there are **project managers** and **engineers** as well as the **site crew / field workers**
- Mostly the people doing the work are employed by the subcontractor. In some cases subs will bring in their own subcontractors for specialty parts of the work
- Times on site can vary – a few hours for a service crew to months or even years for large projects

Account Targeting

- SIC codes
 - Major Group 16: Heavy Construction Other Than Building Construction Contractors
 - Major Group 17: Construction Special Trade Contractors
- NAICS codes
 - Subsector 237 – Heavy and Civil Engineering Construction
 - Subsector 238 – Specialty Trade Contractors

Suggested Basho Email to Gain Attention

ROUND 1 EMAIL

SUBJECT: Salesforce brings value to subcontractors

BODY:

Here's some applications AEC customers of Salesforce find makes compelling impact on their business:

- Managing and tracking customer relationships
- Project lead capture, qualification, and go/no-go decision making automation
- Project lifecycle tracking, including profitability, tied to specific customers and project

categories for analysis

- Project management tools easily accessible from mobile devices (submittals, RFIs, daily reports, etc.)
- Management visibility to the business through visual dashboards and reports”

ROUND 2 EMAIL

SUBJECT: 5 minute video – Salesforce applications for construction subcontractors

BODY:

Seeing is easier than reading when envisioning the impact a sales and marketing automation platform can bring to your organization. If you have five minutes, you may get some great ideas from this video:

<please use the link in the Resource Center for Subcontractor 5 minute video, as we may update it periodically>

Key Pitch Messages

- Sales – strongest play for Salesforce
 - **Relationships** – because it’s a small world, you need to know everyone and keep good relationships with them to continue winning business
 - *Q: How do you track which GCs you’re working with, which ones you want to work with, and how you’re getting on board with new GCs?*
 - *Q: Do you have relationships with owners/architects*/engineers that would be useful to keep a record of?*
 - *Q: How do you track decision makers who might not be fans of your company, so you can focus on winning them over?*
 - **Projects** – what buildings/works are being planned, who’s the GC, who are the owner/architect*/engineer, what conversations are you having with GCs to make sure you’re invited to bid. NOTE – estimating is a complex process that often involves highly dynamic pricing, and adjusting different prices in the bid to play against risk factors. There are many construction-specific estimating programs, including those that tie into databases with price updates. In some cases CPQ might be a fit, but don’t assume it would be for all subs
 - *Q: Describe your estimating team? How many, what roles?*
 - *Q: Describe your project management team? How do they work?*
 - *Q: If you’ve got multiple people involved in a project, how do you know what conversations they’ve had with key players?*
 - *Q: What tools do you use for estimating?*
 - *Q: How do you track your competition?*
 - *Q: Is there an internal approval process for agreeing which projects to propose on and the amount you propose?*
 - *Q: How do you keep track of potential risks on a project?*
 - *Q: How do you keep track on projects you’ve won, lost, or declined?*

- **Mobile access** – some of these people don't see desks very often
 - *Q: When you're on the road, how do you keep track of projects you're trying to bid for?*
 - *Q: How do you find contact information when you're out and about?*
- Marketing – in most cases not a strong suit for subs.
 - When it comes to getting invited to bid, the focus is on relationships and past success with the GC. If you're reaching out to someone it's usually going to be very specific to them and their project, rather than general information
 - Marketing departments are usually one person – or none, more frequently. ○ It would be pretty rare to have a sub who can put together an email marketing campaign that's sustainable and brings new projects
 - Contact us forms aren't particularly relevant as GCs already know who to reach out to
 - *Q: What marketing do you do?*
- Project management – at subcontractor level, Salesforce can sometimes be used ○ Projects are extremely drawing-focused, and moving towards 3d systems for large projects ○ There's a need to manage a large number of people and also materials and equipment ○ For faster-track projects and service, field service lightning may be relevant ○ There's a good bit of competition from construction-focused point solutions that are drawing-centric and mobile-focused and often span from estimating to project completion, and some focus on specific trades/subs. e.g. Procore, COINS, eSUB, PlanGrid ○ *Q: How are you handling RFIs, compliance, punch lists, and project reporting? Do you do daily reports?*
 - *Q: How do you handle change order requests?*
 - *Q: How do you handle assigning field workers / crews to projects?*
 - *Q: How do you keep track of materials lead times and deliveries?*
 - *Q: Do you manage any equipment? How do you handle the inventory, including maintenance?*
- Finance – might be a pitch for some subs
 - You've placed a bid and won it; now you have to make sure you make money on the project. If there are changes in documentation (new drawings and specifications etc.) or other change orders, you want to track them to make sure you're getting paid for the new works. You want to make sure that labor and materials (and, in some cases, equipment) don't end up costing more than you estimated
 - *Q: Are you losing any money because you don't know what's being spent?*
 - *Q: How do you track actual costs against estimated?*
 - *Q: How do you manage change orders?*
 - *Q: How do you handle retention?*
- ROI examples:
 - Don't lose track of projects, make sure they're followed up on → bid on higher # of projects
 - Visibility to the results of bid projects → know your win/loss rates, spend more time on

- the best clients, price more effectively to drive your margins up
- Manage process of bid approvals → more focus on bidding projects you're more likely to win
- Good management of bidding process → better impression on GC → higher likelihood to win
- Ability to track relationships → ability to focus on improving relationships with decision makers → higher likelihood your proposal will be considered instead of just used as a number to play off against other subs
- Automate RFIs, Change Orders, Submittals, and Daily Reports → eliminate manual labor, and boost the productivity and responsiveness of your team. Provide better service to your customers, driving customer satisfaction up.
- Ability to manage RFIs and punch lists → less likely to lose track of issues and cause delays
- Visibility into finances and management of change orders → less likely to lose money from change orders not submitted or managed

Discovery Questions

1. What type(s) 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). Examples:
 - a. New construction
 - i. General purpose?
 - ii. Or specialized buildings, like healthcare, multi-family residential, office space, etc.
 - b. "Fitouts" / interiors
 - i. The building is already up, but a new law-firm is moving into two floors and wants to refinish the space, for example)
 - c. Maintenance
 - i. The building or campus of buildings are up, but continual maintenance and upgrade work needs to be done
2. What's your geographic footprint?
 - a. Usually, subcontractors are local to a municipal area or super-regional, at largest 3. How do you manage the business? As a whole, or do you divide it into divisions/business units? a. What are the relative sizes of these divisions?
4. 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 & how do you first hear about projects?
 - a. What timing stage is key for you? (e.g. project conception, budgeted, early stage design, completed design, RFP)
 - b. Who typically hears about them first?
 - c. How do you source them? How important are your GC / Construction Manager relationships in bringing them to you?
 - d. Do you use databases like Dodge, CMD, CoStar, or Industrial Info to find projects to pursue?
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 do typical projects look like for you?
 - a. How large (in terms of \$\$ and staffing)?
 - b. What timeframe / duration are they?
 - c. How many projects are you typically working on at any one given time?
9. How do you track relationships?
 - a. How do you track individuals at general contractors/owners/facility managers etc. to see where you've worked with them in the past?
 - b. Who in your team has relationships with them?
 - c. How do you track decision makers who might not be fans of your company, so you can focus on winning them over?
10. 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?
 - d. How do you track your competition?
 - e. Is there an internal 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?
11. 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?
12. Describe how you do marketing
 - a. Who on your team does marketing for you? Are they dedicated to marketing?
 - b.

- Do you have any external email campaigns to owners, GCs, property managers? c.
How do you gather information for bios to put in proposals?
d. How do you handle internal mass communications?
13. 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 training/learning management?
14. What software platforms do you already have in place?
a. What ERP system do you use?
b. What software do you currently use for Sales and Marketing?
c. What do you use for email?
d. What estimating tools do you use? Any pain points?
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?

Positioning Clouds Correctly for Them

Subcontractors can definitely benefit from Salesforce, but it's a non-core application for them – non sales users represent the bulk of your license opportunity, so positioning a bundle based on a minority of Sales Cloud seats and a majority of Platform licenses will be the winning approach. The breadth of the AppExchange will serve you well, as well – automated document execution with Conga/DocuSign, accounting integration with Accounting Seed or FinancialForce, high-volume file management with Box.com, for example. Mobile will be key for a lot of the Platform users.

Sales Cloud: Platform seats very likely to be in play – they'll have low price tolerance for lots of potential users who do not need Opps/Leads

Marketing Cloud: A stretch, but possible.

Community Cloud: Customer Community is potentially a good fit for tracking

CPQ: For certain categories (HVAC, for example), it's possibly a strong fit

Field Service: FSL if they provide maintenance services

Marketing Cloud: Not a fit.

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