



Competitor Battlecards

Unanet, Deltek, Hubspot, AEC360, Pipedrive,
Projectmark, Top Builder, Buildr



How to Win Against...

1. Unanet Cosential
2. Deltek CRM
3. HubSpot
4. AEC360
5. Pipedrive
6. ProjectMark
7. Top Builder
8. Buildr



COMPETITIVE SNAPSHOT

Unanet is an AEC-focused CRM positioned as the “easy button” for AEC firms. Their messaging focuses heavily on industry familiarity, proposal generation, and fast deployment for BD and marketing teams. Their core message against Salesforce is simplicity and industry familiarity: **“Salesforce is too complex for AEC.”**

AT A GLANCE

UNANET	SALESFORCE + HUNLEY
Prebuilt AEC workflows	Configured for your business
Proposal-focused CRM	Full customer lifecycle platform
Faster initial setup	Greater long-term scalability
Standard reporting	Advanced analytics & dashboards
AEC-specific CRM + ERP ecosystem	AEC expertise on the Salesforce platform
Closed ecosystem with limited flexibility	Open ecosystem + AI innovation

WHY CUSTOMERS BUY UNANET

- ENR Top 100 presence (legacy enterprise credibility — half of the top 100 were once Cosential/Unanet customers)
- AEC-specific workflows
- Proposal & resume generation
- Prebuilt ERP integrations
- Familiar seller-doer experience
- Proposal-focused workflows for BD and marketing teams
- Strong proposal & pursuit management
- Industry-first sales messaging
- Bundled CRM + ERP ecosystem
- Familiar choice for AE firms

WHY SALESFORCE/HUNLEY WINS

- Modern UI that marketers and design-minded stakeholders actually want to use
- Prebuilt for AEC, tailored for your business
- Built for growth, complexity & scale
- Better reporting & dashboards
- Stronger integrations & APIs
- Supports the full project lifecycle
- AI + automation ready
- Strong Microsoft integration
- Enterprise-grade ecosystem
- Industry accelerators available
- ProposalWizard modernizes proposal workflows



BEST FIT PROSPECTS

- AEC firms outgrowing legacy CRM
- Complex ERP environments
- Enterprise construction teams
- Enterprise teams needing flexibility

INDICATORS FOR A SALESFORCE FIT

- “We’ve outgrown our CRM.”
- “Reporting is difficult.”
- “We need more flexibility.”
- “Our systems don’t connect well.”
- “We need one connected platform.”
- “We need more than proposal management.”



COMPETITIVE SNAPSHOT

Deltek Vantagepoint is the leading ERP/PM platform for AEC firms, centered around project financials, resource management, and operational visibility. Their CRM is often bundled into the ERP platform and positioned as “good enough” for business development teams.

“AEC firms need connected project, financial, and operational visibility — not just pipeline management.”

AT A GLANCE

DELTEK	SALESFORCE + HUNLEY
Leading AEC ERP & project platform	Leading CRM & growth platform
Built for project financial management	Built for client & pursuit management
Strong operational & resource visibility	Stronger pipeline, forecasting & resource visibility
Standardized AEC workflows	Flexible AEC workflows, AI, & automation

WHY CUSTOMERS BUY DELTEK

- Strong project accounting
- Resource planning visibility
- Familiar AEC platform
- Integrated ERP + CRM
- Operational project workflows
- Easier finance alignment
- Project-centric reporting

WHY SALESFORCE/HUNLEY WINS

- Better client & pursuit visibility
- Stronger customization flexibility
- Advanced reporting & forecasting
- Cross-functional business platform
- Deeper integrations & APIs
- More advanced automation & AI
- Proven AEC expertise
- Better fit for complex firms
- ProposalWizard for proposals & resumes



BEST FIT PROSPECTS

- Growing AEC firms
- Multi-office organizations
- Complex operational environments
- Firms outgrowing bundled CRM

INDICATORS FOR A SALESFORCE FIT

- “Our marketers don’t use Deltek.”
- “We need stronger forecasting.”
- “We’re manually re-entering data.”
- “We need better integrations.”
- “Our workflows are becoming complex.”
- “Leadership wants better analytics.”



COMPETITIVE SNAPSHOT

HubSpot positions itself as the easier, more intuitive CRM alternative to Salesforce. Their strategy focuses heavily on clean UI, simple buying experiences, lower-cost bundled functionality, and strong marketing automation capabilities. Their core competitive message is: **“Salesforce is complex, expensive, and cobbled together.”**

AT A GLANCE

HUBSPOT	SALESFORCE + HUNLEY
Simple, clean UI	Enterprise-grade flexibility
Strong Marketing Hub	Broader platform ecosystem
Lower-cost, easier adoption	Built for complex growth
Bundled functionality	Best-in-class integrations
Accessible all-in-one platform	Enterprise AI & automation

WHY CUSTOMERS BUY HUBSPOT

- Clean, intuitive UI
- Strong marketing automation
- Easy internal buy-in
- Bundled functionality
- Familiar marketing platform
- Easy SMB adoption
- “Single vendor” messaging
- Freemium/low-barrier entry

WHY SALESFORCE/HUNLEY WINS

- Enterprise scalability
- Stronger platform flexibility
- Advanced reporting & analytics
- Larger partner ecosystem
- Better integrations & APIs
- Built for complex construction teams
- Industry-specific expertise
- More configurable workflows
- Enterprise AI capabilities
- Proven long-term scalability

BEST FIT PROSPECTS

- Growing mid-market firms
- Complex sales organizations
- Multi-system environments
- Enterprise construction teams

INDICATORS FOR A SALESFORCE FIT

- “We need more customization.”
- “Reporting is too limited.”
- “We’ve outgrown HubSpot.”
- “We need deeper integrations.”
- “Marketing can’t be our only focus.”
- “We need enterprise scalability.”



COMPETITIVE SNAPSHOT

aec360 is a Microsoft Dynamics-based CRM purpose-built for AEC firms. Their messaging leans heavily into Microsoft integration, proposal automation, and seller-doer adoption. Their core pitch is: **“AEC firms already invested in Microsoft should stay in the Microsoft ecosystem.”**

AT A GLANCE

AEC360	SALESFORCE + HUNLEY
Built on Microsoft Dynamics	Built on Salesforce ecosystem
Strong Microsoft positioning	Enterprise CRM market leader
Proposal & relationship focused	Full customer lifecycle platform
Microsoft-centric user experience	Greater platform flexibility
Microsoft-native integrations	Flexible integrations across platforms

WHY CUSTOMERS BUY AEC360

- Deep Microsoft integration
- Proposal automation tools
- Relationship intelligence
- Go/no-go workflows
- Seller-doer friendly workflows
- Embedded Power BI dashboards
- Familiar Dynamics interface
- AEC-specific positioning

WHY SALESFORCE/HUNLEY WINS

- More scalable platform ecosystem
- Stronger customization flexibility
- Better user experience & mobile app
- Advanced AI & automation
- Cross-functional business platform
- Enterprise-grade integrations
- Works beyond the Microsoft ecosystem
- ProposalWizard closes proposal gap



BEST FIT PROSPECTS

- Microsoft-centric enterprise AEC firms
- Complex sales organizations
- Multi-system environments
- Firms outgrowing Dynamics limitations

INDICATORS FOR A SALESFORCE FIT

- “We need more flexibility.”
- “The UI feels outdated.”
- “Implementations are too expensive.”
- “We need broader functionality.”
- “We want deeper customization.”
- “We need flexibility beyond Microsoft tools.”

The Pipedrive logo is displayed in a white box against a background of a construction site with yellow cranes and steel structures.

COMPETITIVE SNAPSHOT

Pipedrive positions itself as a simple, sales-first CRM built for SMB teams that want fast adoption and minimal admin overhead. Their biggest strengths are simplicity, affordability, ease of use, and quick deployment.

Their core pitch is:

“Why pay for enterprise CRM when your team just needs something simple?”

AT A GLANCE

Pipedrive	SALESFORCE + HUNLEY
Simple visual pipeline UI	Enterprise-grade flexibility
Lower-cost SMB CRM	Built for long-term growth
Simple sales team adoption	Advanced customization & automation
Sales-focused workflows	Full customer lifecycle visibility

WHY CUSTOMERS BUY PIPEDRIVE

- Extremely intuitive UI
- Fast, low-cost implementation
- Strong visual pipeline management
- Easy sales rep adoption
- Affordable pricing for small teams
- Lightweight administration
- Simple workflow automation
- Good fit for simple sales processes

WHY SALESFORCE/HUNLEY WINS

- Built for growing, complex organizations
- More advanced automation
- Stronger reporting & forecasting
- Deeper customization flexibility
- Cross-functional platform capabilities
- More robust integrations & APIs
- Advanced AI & analytics ecosystem
- Better support for multi-team operations
- Stronger marketing & service capabilities

BEST FIT PROSPECTS

- Small firms needing lightweight CRM
- Complex sales organizations
- Multi-department CRM needs
- Growing firms needing more scalability

INDICATORS FOR A SALESFORCE FIT

- “We need more advanced reporting.”
- “Our workflows are getting more complex.”
- “Sales can’t operate separately anymore.”
- “We need stronger automation.”
- “We’ve outgrown a basic CRM.”
- “We need one connected platform.”

AT A GLANCE



COMPETITIVE SNAPSHOT

ProjectMark is a construction-specific CRM focused on proposal workflows, pipeline visibility, and construction-focused seller workflows. Their biggest strengths are ease of use, construction-focused workflows, proposal management, and fast user adoption. Their core pitch is:

“Construction teams need a modern CRM purpose-built for construction pursuits.”

PROJECTMARK	SALESFORCE + HUNLEY
Built for standard construction workflows	Built for complex construction operations
Strong proposal & pursuit workflows	ProposalWizard + enterprise platform flexibility
Construction-focused quick adoption	Scalable long-term architecture
Lightweight construction CRM	Deep construction & Salesforce expertise

WHY CUSTOMERS BUY ProjectMark

- "Shows extremely well" — visually polished, marketing-friendly, tiles-based UI
- In-product InDesign-style proposal tool embedded directly in the platform
- Construction-specific workflows
- Easy-to-use interface
- Proposal, pursuit & resource management
- Modern pipeline visibility & UX
- Fast adoption for construction teams
- Good fit for SMB/mid-market firms
- Relationship tracking tools
- Purpose-built construction positioning

WHY SALESFORCE/HUNLEY WINS

- Company scale and stability (21-person team vs. enterprise-backed platform)
- Better fit as firms grow beyond SMB
- More advanced customization
- Stronger reporting & forecasting
- Broader enterprise integrations & ecosystem
- More mature AI & automation ecosystem
- Supports the full customer lifecycle
- Enterprise-grade security & governance
- Proven AEC accelerators & expertise
- Better fit for complex organizations

BEST FIT PROSPECTS

- Construction firms planning for growth
- Multi-office contractors
- Complex operational environments
- Firms outgrowing lightweight CRM

INDICATORS FOR A SALESFORCE FIT

- “We need more advanced reporting.”
- “Our workflows are getting more complex.”
- “We need deeper integrations.”
- “We need one connected platform.”
- “We need a platform that can scale with us.”
- “Sales can’t operate separately anymore.”



COMPETITIVE SNAPSHOT

TopBuilder is a contractor-focused CRM centered around estimating, bid management, backlog forecasting, and preconstruction visibility. Their positioning is heavily operational — helping construction firms connect pipeline activity directly to future revenue and project execution.

Their core message is:

“Construction firms need visibility into bids, backlog, and preconstruction — not just sales activity.”

AT A GLANCE

TOPBUILDER	SALESFORCE + HUNLEY
Backlog-centric forecasting	Executive-level forecasting & analytics
Estimating-driven sales process	Advanced automation & AI workflows
Faster field team adoption	Enterprise operational scalability

WHY CUSTOMERS BUY TOPBUILDER

- Purpose-built for specialty trades (roofing, siding, concrete) — not GC-focused
- Bid & backlog visibility
- Preconstruction workflows
- Estimating integration focus
- Contractor-specific CRM
- Simpler implementation approach
- Easy sales team adoption
- Construction-focused reporting

WHY SALESFORCE/HUNLEY WINS

- Better enterprise scalability
- Stronger customization flexibility
- Advanced reporting & forecasting
- Cross-functional business platform
- Deeper integrations & APIs
- More advanced automation & AI
- Proven AEC expertise
- Better fit for complex organizations
- ProposalWizard closes proposal gap



BEST FIT PROSPECTS

- Growing contractors
- Multi-office construction firms
- Complex operational environments
- Firms outgrowing lightweight CRM

INDICATORS FOR A SALESFORCE FIT

- “We need deeper forecasting.”
- “Our teams operate in silos.”
- “We need stronger integrations.”
- “Our workflows are becoming more complex.”
- “We need visibility beyond preconstruction.”
- “Leadership wants better analytics.”

BUILDR

COMPETITIVE SNAPSHOT

Buildr is a modern preconstruction platform focused on estimating, pursuits, and proposal workflows. Their strength is a simple, highly visual user experience built for fast team adoption and efficient preconstruction operations. Their core message is: **“Streamline preconstruction from pursuit to proposal in one connected platform.”**

AT A GLANCE

BUILDR	SALESFORCE + HUNLEY
Preconstruction-focused platform	Enterprise-grade flexibility
Strong estimating & proposal workflows	Stronger CRM & client visibility
Simple, unified user experience	Flexible & scalable ecosystem
Fast team adoption	Advanced automation & AI

WHY CUSTOMERS BUY BUILDR

- Strong Procore ecosystem connection/integration
- Revenue-based pricing familiar to Procore users
- Modern, intuitive UI
- Short Implementation
- Strong estimating workflows
- Proposal & InDesign capabilities
- Unified preconstruction workflows
- Workforce Planning & Resource Management
- Competitive pricing

WHY SALESFORCE/HUNLEY WINS

- We also integrate with Procore — their core differentiator isn't exclusive to them
- Better executive visibility
- Stronger relationship management
- More scalable long-term platform
- Deeper integrations & APIs
- Better fit for complex firms
- ProposalWizard for resumes & project sheets in InDesign



BEST FIT PROSPECTS

- Growing contractors
- Multi-office organizations
- Complex operational environments
- Firms planning for long-term scale

INDICATORS FOR A SALESFORCE FIT

- “We need stronger forecasting.”
- “We need enterprise integrations.”
- “Our workflows are becoming more complex.”
- “We need a platform that scales.”



Need assistance with an account?

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COMPETITIVE SNAPSHOT

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AT A GLANCE

Pipedrive	SALESFORCE + HUNLEY
Simple visual pipeline UI	Enterprise-grade flexibility
Fast SMB deployment	Scalable long-term platform
Easy rep adoption	Advanced Customization and Automation
Sales-focused workflows	Full customer lifecycle visibility

WHY CUSTOMERS BUY PIPEDRIVE

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WHY SALESFORCE/HUNLEY WINS

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BEST FIT PROSPECTS

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INDICATORS FOR A SALESFORCE FIT

- “W