

The Ultimate Guide to Choosing The Right CRM for Your AEC Firm

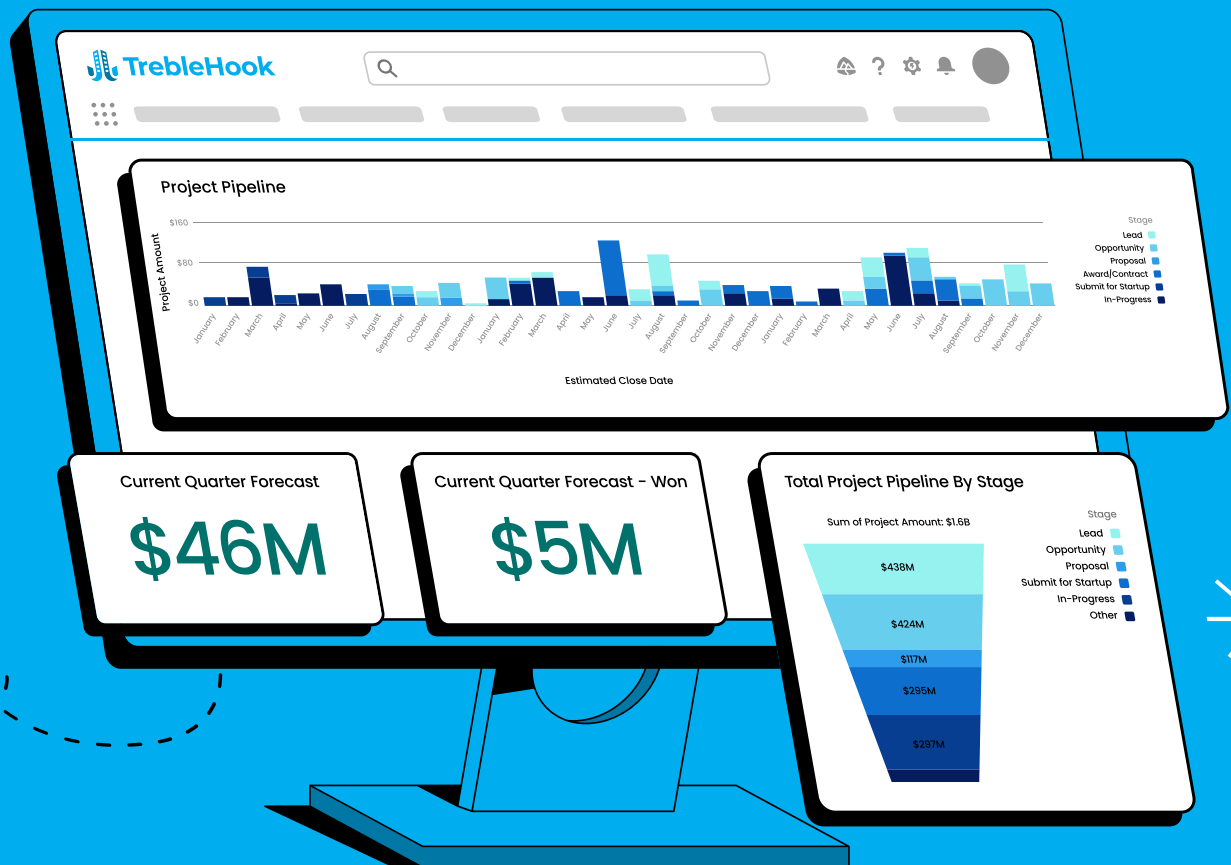


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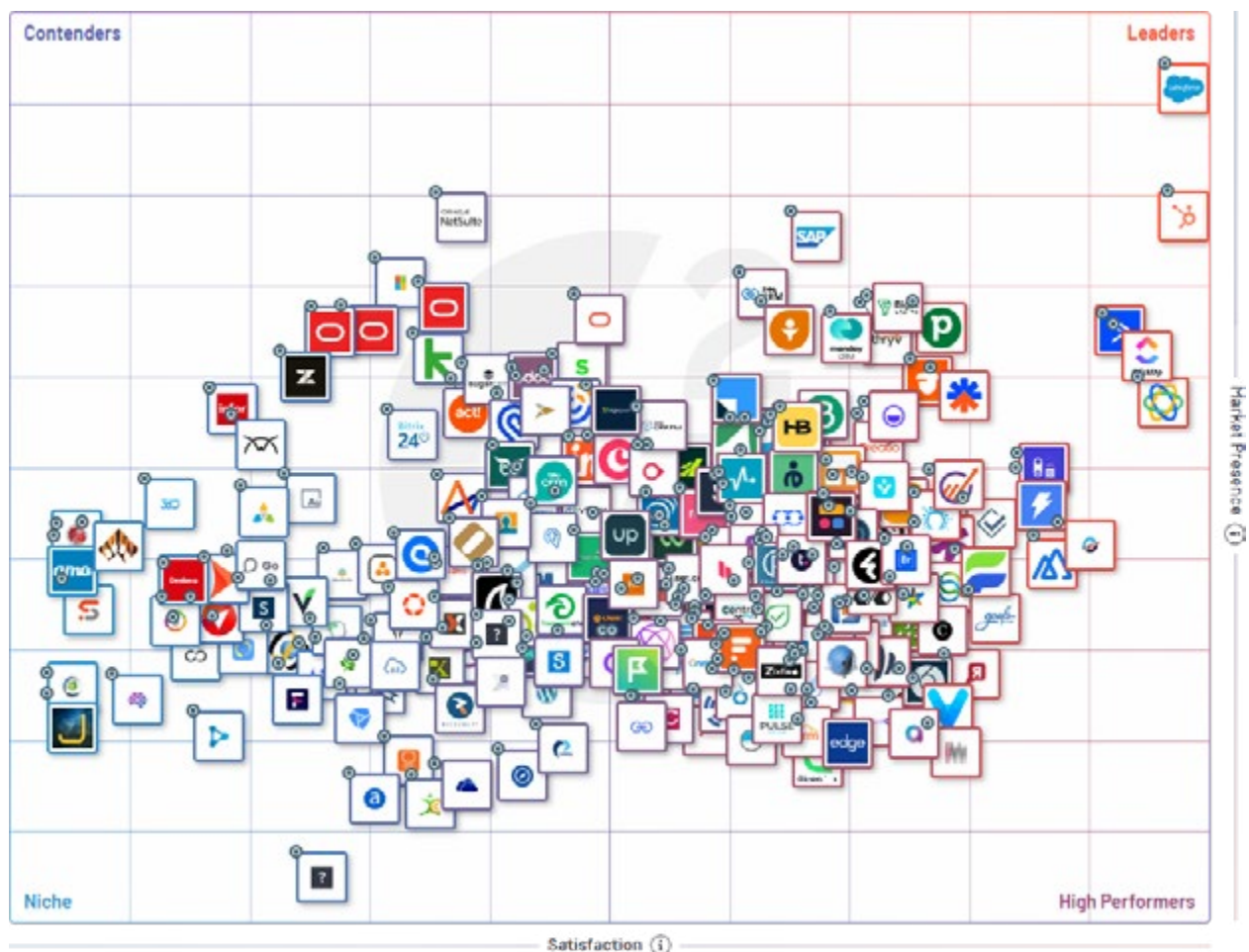
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Introduction

In AEC, client relationship management is critical to success. A CRM system helps centralize client data, improve communication, and help your firm pursue and land the right projects. But, with over 700 CRM options available—highlighted by G2's CRM grid (below)—choosing the right one can feel overwhelming.

Your firm's size, budget, the key features you need, and integration scope all influence this important decision. At TrebleHook, we understand the complexity of this process, which is why we've created this guide to help you navigate it. By evaluating CRM options through a data-driven lens, you can find the right fit for your firm.

In this eBook, we'll explore the key factors in selecting, implementing, and maximizing the value of a CRM tailored to the AEC industry. Let's get started on finding a solution that not only fits but empowers your firm to thrive.



G2 Grid® Scoring



The 5-Step Selection Process

Selecting the right CRM for your firm is a strategic endeavor that requires careful planning and execution. Following a structured process enhances your chances of selecting a system that not only meets your current needs but also supports your firm's long-term growth and success.

We've identified five critical steps to guide you through this journey. Each step plays a vital role in ensuring that the CRM you choose is aligned with your firm's objectives and operational requirements.

Step overview:

1. Assemble the Right Team
2. Establish the Vision, Goals, and Budget
3. Investigate and Evaluate CRM Vendors
4. Choose a Solution, Negotiate, and Commit
5. Launch and Deploy the CRM System

1. Assemble the Right Team

Choosing a CRM isn't a solo mission. It's a team effort that thrives on insights from different departments across your organization. By bringing together the right people, you lay the groundwork for successfully choosing and implementing the **RIGHT** CRM.

Why a Diverse Team Matters

Involving representation from Business Development, Operations, Finance, Marketing, IT, and Project Management ensures the CRM meets the entire organization's needs. Sales may prioritize lead tracking, while Marketing focuses on proposals, making the CRM more valuable across departments.

Building Ownership and Commitment

Involving key stakeholders early creates a sense of ownership, encouraging active participation and reducing resistance. Regular collaboration promotes open communication, addressing concerns and managing expectations effectively.

Defining Roles for Success

Define roles in the CRM selection team clearly. Appoint a strong leader as the project champion to manage meetings, timelines, and goals. Department reps act as subject matter experts, ensuring the CRM meets their teams' needs and preparing them for changes.

Effective Collaboration Strategies

To keep the team working smoothly, establish regular meetings to discuss progress, challenges, and next steps. Use collaborative tools for sharing updates and feedback. Also, set clear decision-making processes, including criteria for evaluating CRM options and resolving disagreements.

Documenting Requirements and Expectations

Work together to document the detailed requirements and expectations for the CRM. Conduct thorough assessments to understand current processes, identify gaps, and determine how the CRM can address these issues. Define success metrics, including key performance indicators (KPIs) and measurable outcomes. Also, consider future needs to ensure the CRM can grow with your firm.



- Project Managers
- Executives/Leadership
- Sales/Business Development
- Finance
- IT
- Marketing

2. Establish the Vision, Goals, and Budget

With your team in place, it's time to define what you want from a CRM. Establishing a clear vision, setting measurable goals, and determining your budget will ensure your CRM aligns with your firm's strategic direction.

Crafting Your Vision

Your vision acts as the guiding light for picking a CRM. Make sure it aligns with your firm's long-term business goals, such as growth, market expansion, or tech adoption. Think beyond immediate challenges and focus on how the CRM will support future initiatives. Clear communication of this vision is essential for team alignment.

Setting Specific Goals

Create SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound) to map out success. Focus on objectives like improving client relationships, streamlining workflows, or enhancing data management. For example, aim to reduce proposal preparation time by 30% in six months.

Understanding Needs and Pain Points

Conduct a needs assessment to identify inefficiencies and challenges in your current workflows. Gather employee input to understand their daily challenges and prioritize CRM features accordingly.

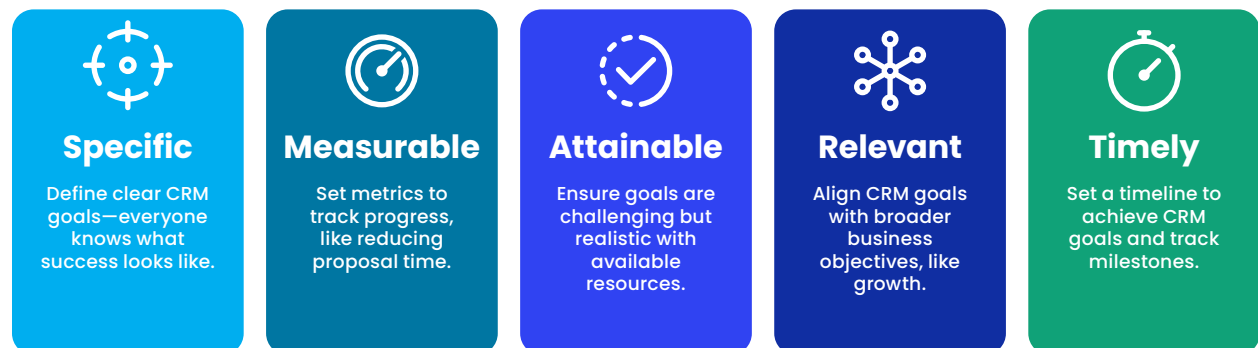
Budgeting Wisely

Ensure your budget covers both upfront and ongoing costs (licensing, training, subscriptions) and includes flexibility for customization or unforeseen expenses. Evaluate the return on investment (ROI) based on efficiency gains and increased sales, while considering long-term benefits.

Using Evaluation Tools

Use an [evaluation matrix](#) to objectively compare CRM options based on your firm's needs. Benchmark against industry standards and similar firms to make informed decisions. Keeping detailed records of your evaluations will support transparency and future decision-making.

By defining your vision, goals, and budget early, you ensure a focused and efficient CRM selection process that supports your firm's growth.



3. Investigate and Evaluate CRM Vendors

With your vision, goals, and budget in place, it's time to research and evaluate CRM vendors to find the best fit for your firm. This step is critical for ensuring you select a partner that aligns with your needs and long-term success.

Start with Comprehensive Research

Look for CRM solutions tailored to the AEC industry. Focus on systems that offer AEC-specific features and workflows. Don't forget to explore adaptable platforms that leverage AI and automation for added efficiency.

Use Multiple Information Sources

Gather insights from online reviews on platforms like [G2](#) and [Capterra](#). Explore vendor websites, [attend demos](#), and review industry reports to stay updated on trends and innovations.

Seek Referrals and Peer Insights

Talk to peers and industry associations for real-world feedback. [Case studies](#) and testimonials from similar firms can provide a clearer picture of the CRM's impact. Industry conferences are another great place to meet vendors and learn from others' experiences.

Engage Directly with Vendors

Ask vendors for client references, especially those similar in size and scope to your firm. Inquire about customer support and ongoing satisfaction to gauge the long-term relationship potential.

Evaluate Vendor Offerings

Ensure the CRM meets your needs, like contact management and project tracking, and check for integration capabilities with your current systems. A user-friendly interface is key to team adoption, so don't overlook the user experience.

Consider Technical and Financial Aspects

Look into scalability, security measures, and whether a cloud-based or on-premises solution fits your needs. Conduct a cost-benefit analysis to weigh pricing against potential efficiency gains. Take advantage of [demos](#) to test the CRM in your environment.

Assess the Vendor Team

Evaluate the vendor's understanding of your needs, their flexibility, and their ability to support your firm. Consider factors like implementation, training, and long-term support, as well as cultural fit.

Shortlist and Compare

Narrow down your options and use an [evaluation matrix](#) to compare vendors. Highlight strengths and weaknesses, then conduct final demos and Q&A sessions. Gather feedback from stakeholders to ensure alignment.

By thoroughly investigating and evaluating CRM vendors, you'll be equipped to make an informed, confident decision that supports your firm's growth and success.

4. Choose a Solution, Negotiate, and Commit

After all your research and evaluation, it's time to make a decision, negotiate the terms, and commit to your chosen CRM vendor. This is where you formalize the partnership and set clear expectations for implementation and ongoing collaboration.

Making an Informed Decision

With your evaluation in hand, choose the CRM that best aligns with your firm's needs and goals. Review the scores and rankings, address any stakeholder concerns, and conduct a risk assessment to mitigate potential issues. Ensure the CRM meets your key objectives, supports future growth, and aligns with your firm's values and working style for a solid long-term fit.

Preparing for Negotiation

Before negotiating, solid preparation is key. Clearly define your budget, priorities, and non-negotiables like support levels and data security. Identify your negotiation levers, such as long-term commitments or expanded services. Gather relevant information, including competitor pricing and industry standards. Lastly, be ready to address legal clauses that protect your firm's interests.

Conducting Effective Negotiations

During negotiations, focus on achieving mutually beneficial agreements that set the stage for a strong partnership. Start with pricing and payment terms—seek transparency and flexibility that fits your budget. Look for discounts based on contract length or user volume, and ensure payment schedules align with your financial plans.

Service level agreements (SLAs) are critical—establish clear expectations for uptime, response times, and issue resolution. Negotiate customer support, including availability, communication channels, and escalation procedures. Ensure regular system maintenance, updates, and upgrades are included.

For implementation and training, agree on a detailed schedule with key milestones and negotiate thorough training to ensure all users are prepared. Ensure data migration is safe and efficient.

Lastly, review contract terms—define termination conditions, notice periods, and costs. Protect your firm's data and intellectual property with robust clauses, and clarify responsibilities in case of disputes or breaches.

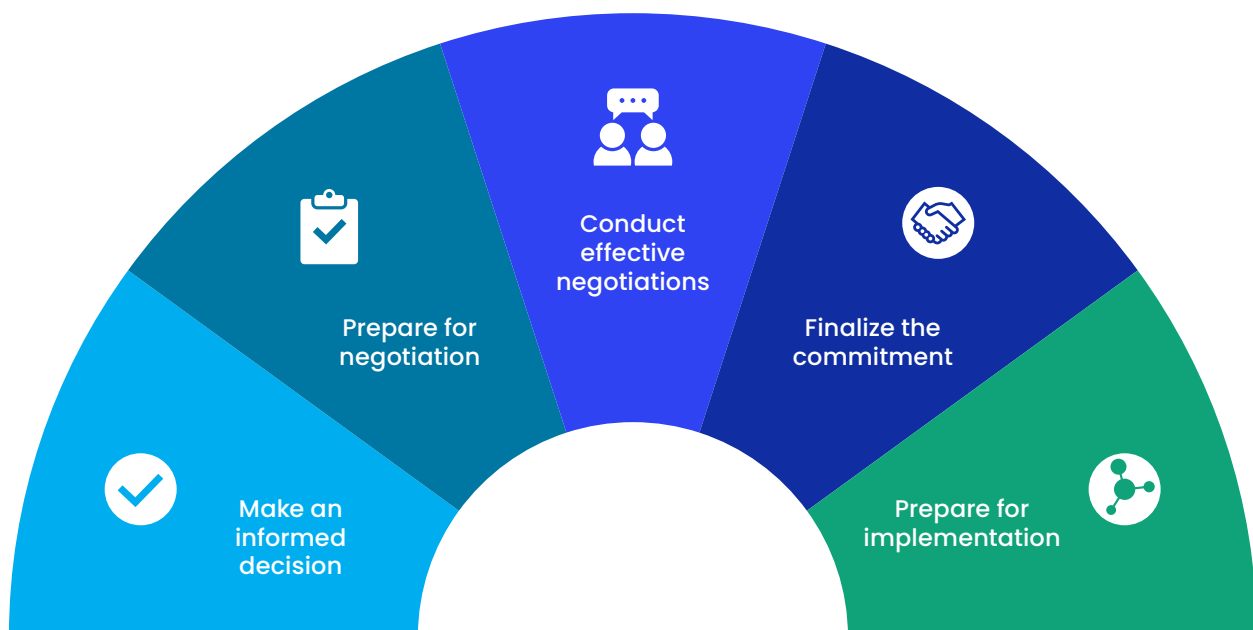
Formalizing the Commitment

Once negotiations wrap up, formalize the agreement to establish a clear, binding partnership. Have your legal team thoroughly review the contract to ensure compliance and protection of your firm's interests. Confirm that all negotiated terms are accurately documented, and follow internal approval protocols to finalize the contract. Establish clear communication channels by designating key contacts from both your firm and the vendor for smooth coordination. Set up a governance structure with regular meetings and reporting mechanisms to monitor progress and address any issues. Reiterate mutual goals to reinforce alignment, and establish processes for ongoing feedback and continuous improvement.

Preparing for Implementation

Finally, prepare thoroughly for the upcoming implementation phase to ensure a smooth transition. Develop a detailed implementation plan outlining tasks, deadlines, and responsibilities. Assign necessary resources, including personnel, time, and budget, to support implementation activities. Identify potential challenges and create contingency plans. Engage stakeholders early by informing them of the changes and timelines, and prepare strategies to manage organizational change. Start engaging end-users early to build excitement and readiness for the new system.

By carefully choosing your CRM, negotiating terms skillfully, and committing to a well-structured agreement, you lay a solid foundation for successful CRM implementation. This step ensures that both your firm and the vendor are aligned and ready to work together toward achieving your strategic objectives and maximizing the value of the CRM system.



5. Launch and Deploy the CRM System

The final step in your CRM journey is launching and deploying the system across your organization. This phase turns your plans into reality, ensuring the CRM becomes an essential and effective tool within your firm. Proper execution here is critical for achieving your desired outcomes and return on investment.

Prepare for a Smooth Launch

Start by finalizing your implementation plan. This should include detailed schedules with timelines, milestones, and deliverables. Make sure all the necessary resources—personnel, technology, and budgets—are in place to support the deployment. Don't forget to prepare and clean your existing data for migration; data accuracy is crucial for the new system's success.

Assemble Your Implementation Teams

Dedicated teams are key to managing the deployment process. Assign a project manager to oversee everything and coordinate between different teams. Gather technical experts from both your firm and the vendor to handle system setup, customization, and integration. Also, form a change management team to manage organizational change, communication, and user engagement, ensuring everyone is on board with the new system.

Customize and Integrate the CRM

Tailor the CRM to fit your firm's specific workflows and integrate it with your existing systems for seamless operations. Start by defining and documenting the business processes that need to be incorporated into the CRM. Customize features to match your firm's needs and set up access controls to ensure security. For integration, conduct compatibility checks to ensure the CRM works smoothly with your current tools, such as project management and accounting software. Use APIs for smooth data exchange and conduct thorough testing to confirm that all integrations work correctly.

Handle Data Migration Carefully

Data migration is delicate and must be done carefully to maintain quality and continuity. Start by assessing and cleaning your data—review it for accuracy and remove any inconsistencies. Plan the migration in phases to minimize disruption, back up your data before transfer, and ensure secure protocols are in place. After migration, validate the data to ensure everything transferred correctly.

Train and Support Your Team

Empowering your team to use the CRM effectively is crucial for adoption and realizing benefits. Develop comprehensive training programs tailored to different roles. Use a variety of formats—workshops, webinars, tutorials, and hands-on sessions—to cater to different learning styles. Provide accessible materials like user manuals and quick reference guides. Encourage active participation in training and

collect feedback to improve it. Establish ongoing support channels like helpdesks and forums to assist users after training.

Execute the Launch and Monitor Progress

The actual launch of the CRM system is a big milestone, but monitoring and improvement are crucial for long-term success. Consider a soft launch or phased rollout to test the system in real-world scenarios before full deployment. Announce the launch internally with clear communication that highlights the benefits and next steps. Set up real-time monitoring to track system performance and user engagement during the initial phase.

Post-Deployment Support and Optimization

After deployment, continue to support and optimize the system. Set up protocols for quickly resolving any technical issues or user difficulties. Track key performance indicators (KPIs) to assess the CRM's impact. Gather feedback continuously to identify areas for improvement. Celebrate milestones and successes from CRM adoption to keep users motivated.

Ensure Long-Term Success

Sustaining CRM usage and extracting long-term value requires ongoing effort. Leadership plays a key role—leaders should actively use and promote the CRM to set an example. Integrate CRM data into strategic planning and decision-making to show its importance. Implement user engagement strategies like incentives to encourage effective use. Build a community of practice where users can share tips and success stories. Keep users informed about new features with regular updates and ongoing training.

Measure and Communicate Success

Regularly share reports and case studies that showcase improvements and benefits from using the CRM. Use performance data to adjust strategies and ensure the CRM continues to meet your firm's evolving needs.

Successfully launching and deploying your CRM system is a transformative step that can significantly boost your firm's efficiency, client relationships, and overall performance. By carefully preparing, executing, and sustaining your CRM implementation, you ensure your investment delivers substantial and lasting benefits, positioning your firm for continued growth and success in the competitive AEC industry.



10 Measurement Criteria

So, what should you be measuring in a CRM solution you're considering? We've broken down 10 measurement criteria in this section of our eBook for you to use as a guide in selecting your prospective CRM solution. These criteria include:

1. Purpose-Built for AEC
2. Scalability
3. Configurability/Ability to Customize
4. Integration Capabilities
5. Pricing and Return on Investment
6. Adoption/Ease of Use/Intuitive Design
7. Reporting and Analytics
8. Automation, AI, and Workflows
9. Mobility
10. Partnership and Support System

Purpose-Built



Your CRM should focus on projects, not products.

Scalable



Scalability is key—your CRM should grow with your firm.

1. Purpose-Built for AEC

Architects, engineers, and contractors operate in a world vastly different from that of banks, law firms, or tech companies. Your processes are unique, your language is industry-specific, and you're chasing projects—not products. Your sales cycle is complex, involving multiple departments just to win a single project. This complexity is why many CRMs struggle to find their place in the AEC industry.

For your business, you need a CRM that's purpose-built for AEC. It's not just about the software—it's about partnering with a company that understands your industry inside and out. When your CRM provider comes from the AEC world, you gain access to valuable domain expertise, along with best practices (and lessons learned) from other firms just like yours. This expertise can be the rocket fuel that drives successful CRM adoption.

The more your CRM solution is tailored to the specific needs of your AEC firm, the better the utilization and adoption you'll achieve. In turn, this leads to greater value and scalability, helping your business grow more efficiently.

2. Scalability

In business, it's simple: grow or risk falling behind. Growth secures your future, keeps competitors at bay, and attracts team members who are driven to succeed. Your CRM solution should be just as scalable as your company. AEC firms adopt CRM systems at different stages—some are upgrading from Excel, while others are moving from a more robust system and need even greater capabilities. Regardless of where your firm is today, you need a CRM that supports your current needs and lays a solid foundation for future growth.

Switching CRM systems is never easy, so it's crucial to choose a partner that can grow with you. Scalability means your CRM can meet more of your needs as your firm evolves. This includes features and functionality that you might not need today but could be vital tomorrow—like document generation, pricing support, competitor analysis, scheduling, and closeout workflows. Evaluating these capabilities now ensures that your CRM won't just meet your needs today but will continue to support your growth well into the future.

Customizable



Every firm is unique—your CRM should fit your processes for easy adoption.

Interoperable



A CRM that integrates with your existing tools ensures seamless workflows.

3. Configurability / Ability to Customize

Yes, you're an AEC firm, and yes, you share similarities with others in the industry. But let's be honest—you're unique, and you have your own way of doing things. This differentiation is what sets you apart from the competition. While an AEC-specific solution is essential, you also need a CRM that adapts to the way you do business.

A great way to drive CRM adoption is by mirroring your unique processes within the system. Don't settle for an "out of the box" solution that can't be tailored to fit your needs. Ensure that your CRM can be configured and customized to maximize its value to your firm.

A configurable solution goes beyond just CRM—it can support other critical aspects of your business. Whether you want to track insurance certificates, analyze joint venture details, or incorporate surveys and customer feedback, make sure the platform can handle these customizations. The more flexible the solution, the better it can serve your evolving needs and drive success.

4. Integration Capabilities

Wouldn't it be great if one piece of software could do everything for your business? While we all share that dream, it's not the reality. Most software today is designed with a specific area of expertise, leading to multiple tools in your tech stack—ERP for accounting, project management software for operations, and CRM for project pursuit, to name a few. Given this reality, it's crucial to find a CRM that can easily integrate with the various platforms your company uses.

Seamless integration allows you to centralize project data, enabling smoother workflows, better data analytics, and more streamlined operations. Your CRM partner should not only have expertise in integrations but also offer a technology platform that supports future opportunities.

Even if you're not planning to integrate all systems right away, it's essential that your CRM has the capability to do so when you're ready. Whether it's integrating with file management, ERP, project management, HR, or digital asset management systems, your CRM should be flexible enough to support these future connections, ensuring your business is prepared to scale efficiently.

ROI



A CRM should deliver ROI by increasing efficiency and driving business growth.

Easy to Use



A CRM must be easy to use to ensure quick adoption and maximize productivity.

5. Pricing and Return on Investment

Pricing is always a key consideration, and CRM is no different. But it's important to view it as an investment, not just an expense. You're committing money, time, and resources, so you should expect a return that justifies the investment. CRM pricing typically ranges from \$25–50 per user per month for simpler solutions to \$100–150 or more for advanced enterprise platforms, with additional costs for implementation

Implementation is crucial—don't skimp on it. Your partner's support in driving adoption is key to making the CRM work for your business. Also, be clear on your goals, whether it's saving time, increasing revenue, improving recruitment, or boosting profits. Quantify both the cost and the expected return (ROI) to choose a CRM that delivers the value your business needs.

6. Adoption / Ease of Use / Intuitive Design

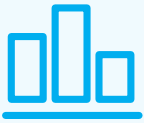
Remember the importance of making your CRM easy to use—one of the key pillars for driving adoption and utilization. Mandates from leadership alone won't ensure that your team embraces the new system. The reality is that most SaaS companies strive to deliver user-friendly solutions, but the complexities of the AEC industry can make this challenging.

We're all busy, juggling multiple priorities, and we don't have time for inefficient tools that slow us down. That's why it's critical to choose a CRM that's not only intuitive but also easy for your team to understand and use. The true test is whether you could drop a user into the system and, with minimal training, they can navigate around and complete basic tasks.

When evaluating CRM options, talk to references or other users and ask them about the ease of use. Do they need to click through multiple steps just to complete a task? Can they easily find the data they need? Do the workflows align with how people actually work? And don't forget to check if the solution supports mobile—accessibility on the go is key for many team members.

Choosing an intuitive, user-friendly CRM will not only improve adoption rates but also enhance productivity by reducing friction in everyday tasks.

Analytics



Intuitive dashboards and reports should help drive key decisions.

Smart



Automation handles tasks like follow-ups and reports, letting you focus.

7. Reporting and Analytics

A common pain point in the AEC industry is the lack of consistent and accurate reporting. Business leaders need a clear, easy-to-read view of their operations, but too often they settle for subpar solutions. Whether your CRM is integrated with your ERP or project management system or not, you should be able to access and analyze data effortlessly.

It's not enough to rely on "out of the box" reports. As you grow and use your CRM more, you'll demand more from it. That's why the ability to create custom reports, dashboards, and analytics on the fly is essential for scaling your business.

To illustrate, consider the kinds of questions your CRM should help you answer:

- How much business did we do with XYZ firm last year?
- What is our win rate against XYZ competitor?
- How many proposals did we generate last month?
- What's our forecast for the rest of the year, broken down by business unit?

The right CRM should make it easy to generate these insights and more, enabling you to make informed decisions quickly and confidently.

8. Automation, AI, and Workflows

AEC professionals need to focus on their expertise, not mundane tasks. That's where automation and AI come in—many CRMs now offer features that reduce workload and help prioritize efforts. Your CRM should handle tasks like sending reports, notifying teams about key actions, and alerting you when projects are won—all with minimal input. The goal: ask once, and it's done.

Here are some practical examples of what automation and AI can do for you:

- **Follow-Up Reminders:** Automatically notify you when a key customer needs follow-up.
- **Proposal Wins:** Instantly alert the leadership team when you win a proposal.
- **Scheduled Reports:** Automatically send your forecast report every Friday morning at 8 a.m.

Mobile



Access from any device, anywhere, for seamless productivity.

Partnership



Your CRM partner should understand and support your business objectives.

9. Mobility

In today's AEC industry, mobility is essential. Our teams are constantly on the move—whether on jobsites, in meetings, in vehicles, or at events. As such, the ability to access and use CRM technology wherever we are is critical to success and should be a key consideration when evaluating CRM solutions.

Mobility isn't just about looking up a contact or account while out in the field. It's about having full access to all your workflows and being able to take meaningful action on the go. Whether you need to submit a project to operations, collaborate with preconstruction on a bid, or review dashboards and reports for insights, your CRM should allow you to execute tasks from any device, anywhere in the world.

The right CRM solution should empower your team to work seamlessly, no matter where they are, ensuring that mobility enhances productivity and keeps projects moving forward.

10. Partnership and Support System

When it comes to CRM—and really any technology platform—it's important to view it as a journey, not a destination. You're not just buying a product that you use once and then you're done. If rolled out effectively, a CRM should lay the foundation for continuous growth and improvement within your organization.

The initial rollout should address your most pressing needs with a strong focus on utilization and adoption. But this is just the beginning. As your business grows, your CRM should evolve with you, taking on more roles and providing greater value over time. Achieving this requires the support of a true partner, not just a vendor.

Your CRM provider should be viewed as a long-term partner—someone who understands your business, shares your vision, and helps you achieve your goals. They should be committed to driving utilization and adoption, offering creative solutions to help your company grow, and being there for the long haul. In today's SaaS landscape, with mergers, acquisitions, and turnover, finding a partner that aligns with your business and is ready to go on this journey with you is the key to long-term success.

Score Your CRM

Selecting the right CRM is a critical decision for your firm, and having a clear, objective way to evaluate your options is key. To help with this process, we've developed a 5-point rating scale that you can use to assess each CRM solution based on the criteria we've discussed.

Rating Scale:

- **1 = Poor**
- **2 = Fair**
- **3 = Good**
- **4 = Very Good**
- **5 = Excellent**

Using this scale, you can score each CRM solution across various categories such as scalability, ease of use, integration capabilities, and more.

To streamline this process, [we've created an interactive Excel matrix](#) that allows you to rate each criterion easily. This tool includes:

- **Individual Rating Tabs:** Each stakeholder can rate the CRM solutions independently, using their own tab.
- **Consolidated Rollup Page:** Automatically blends and aggregates the scores from all stakeholders, providing a comprehensive overview of the results.
- **Heat Map Feature:** Visually highlights strengths and weaknesses, helping you quickly identify the best fit for your firm.
- **Customizable Sections:** Add your logo and tailor the matrix to reflect your specific needs.

This matrix is designed to be both practical and flexible, ensuring that you have a robust tool to guide your decision-making process. Download it now and start scoring your CRM options to find the best solution for your firm.

Final Recap					*Complete the fields in blue
	Criteria Score Results - Based on Stakeholder evaluations from previous tabs				
Evaluating Stakeholder	TrebleHook	Typical AEC Industry CRM	Mainstream CRM Solutions	Excel or CRM Naked	N/A
Insert Stakeholder Name	5.00	3.00	4.00	2.20	#VALUE!
Insert Stakeholder Name					
Insert Stakeholder Name					
Insert Stakeholder Name					
Average Criteria Score	5.00	3.00	4.00	2.20	#VALUE!
	Pricing Recap				
Pricing Structure	TrebleHook	Typical AEC Industry CRM	Mainstream CRM Solutions	Excel or CRM Naked	N/A
First Year License					
Implementation & Pro Services					
Integration					
Additional Costs					
Additional Costs					
Additional Costs					
Total First Year Cost	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Expected Annual Renewal					
Additional Pricing or Vendor					

Why TrebleHook?

After walking through the CRM evaluation process, it's important to explain why TrebleHook was created and how it fits into the landscape of CRM solutions. When we set out to build TrebleHook, we used the same criteria that we've shared with you. Our journey started with a deep listening tour, where we encountered three common scenarios in the AEC industry:

- **World-Class CRMs:** These platforms are powerful, widely recognized, and feature-rich, but they aren't purpose-built for the AEC industry. Their lack of industry-specific functionality often means additional customization, which can be costly and time-consuming.
- **Industry-Built CRMs for AEC:** These solutions are tailored for the AEC sector and understand the unique needs of your business. However, they often fall short in terms of flexibility, scalability, or ease of use compared to the world-class CRMs.
- **CRM Naked (Leveraging Excel, etc.):** Many firms rely on basic

tools like Excel to manage CRM processes. While this approach is cost-effective and familiar, it lacks the sophistication, automation, and scalability needed to support long-term growth.

We evaluated each of these options using our rating scale, considering key factors like purpose-built design, scalability, customization, and more. What we found were significant trade-offs with each approach—none of the existing solutions fully met the needs of AEC firms striving for both industry-specific functionality and world-class CRM capabilities.

This realization drove us to create TrebleHook—a CRM that combines the best of all worlds. We took the robustness and flexibility of leading CRMs and fused them with the deep, industry-specific insights required by AEC firms. TrebleHook is designed to be the perfect blend: purpose-built for AEC, highly configurable, scalable, and easy to use.

