



FOCUS YOUR SALES FORCE

WITH PROJECT LEAD INTEGRATION AND WORKFLOW

Insider's Guide: Focus your Sales Force with Project Lead Integration and Workflow

In today's highly competitive, low margin environment, it's simply not enough for those in the construction space to purchase a lead generation service and turn on the data pipe. For optimal success, the sales process must flow from the search for the best opportunities to the project win.

Lead integration within a technology-driven sales workflow provides a unified version of the marketplace.

An integrated project lead and sales workflow enables a sales staff to effectively and efficiently find, prioritize and track project leads for greater productivity and efficiency. As well, when lead data is sorted, prioritized and distributed within a streamlined process, the sales team is able to demonstrate a measurable financial return that justifies the continued investment in a lead generation source.

Done right, integrating project lead data into a technology-driven sales workflow becomes a differentiator that can put your company ahead of the rest.

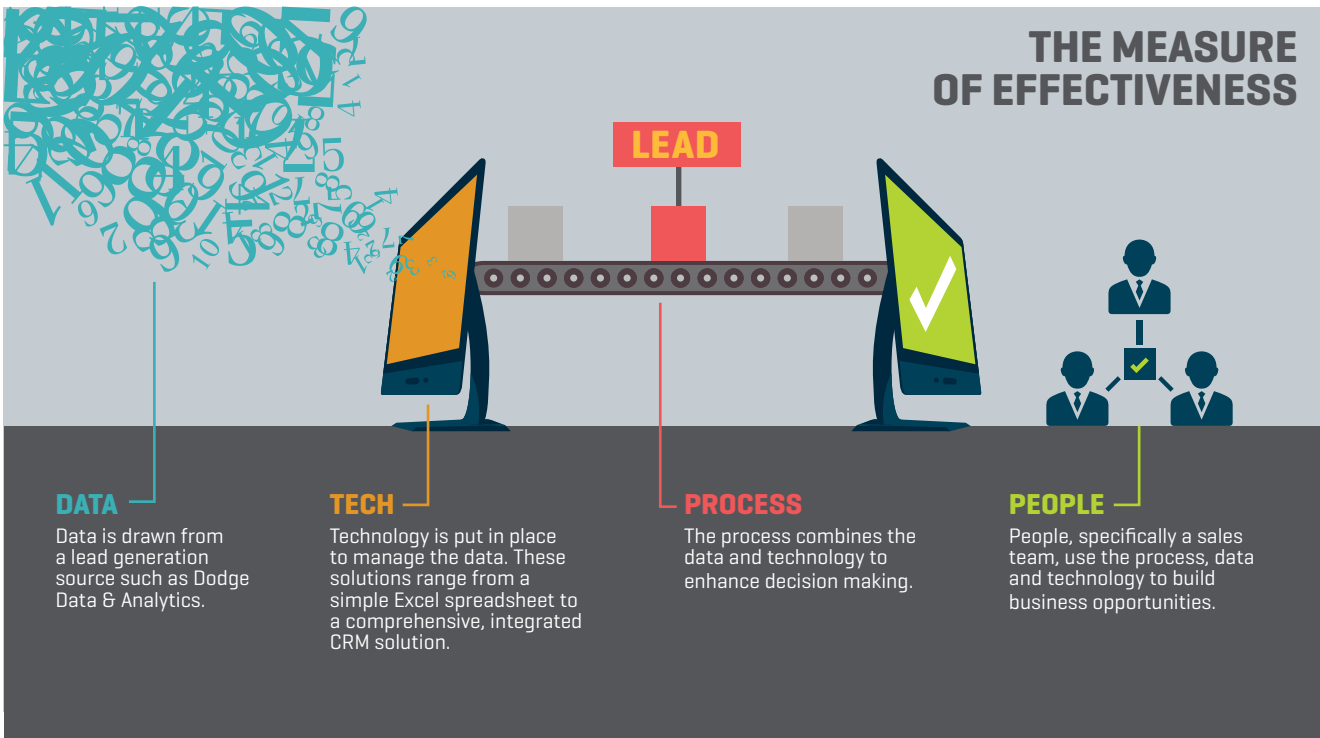
The Measure of Effectiveness

Project lead integration within a technology-driven sales workflow provides a unified version of the marketplace.

Fundamentally, an integrated sales workflow requires four elements: data, technology, process and people.

- 1) Data is drawn from a lead generation source such as Dodge Data & Analytics [Dodge].
- 2) Technology is put in place to manage the data. These solutions range from a simple Excel spreadsheet to a comprehensive, integrated customer relationship management [CRM] solution.
- 3) The process combines the data and technology to enhance decision making.
- 4) People, specifically a sales team, use the process, data and technology to build business opportunities.

William McGinnis, sales and marketing automation advisor with Dodge, says, "What I like about integrating project leads into a technology-driven sales workflow,



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such as a CRM, is that it provides a unified version of the marketplace. It's one place for all sales activity. The promise of a CRM-like approach is that no lead is left behind. All leads flow into one system; they're not scattered into different places. Sales people don't have to search for things. It provides an efficient and accurate lead assignment process."

The lead data source should provide value as well. Dodge lead data, for instance, is designed to integrate with a company's sales process via several methods depending on a company's needs.

We assign a wide variety of attributes to create layers of filtering options. A sales rep in Southern California might only want to see projects over \$50 million for a specific market.

Project lead prioritization and sales workflow integration is possible in several ways.

- 1) Dodge Global Network saved searches,
- 2) ConstructionPoints, an on-demand project lead management service, and
- 3) ConstructionPoints for Salesforce, a project lead management application developed specifically for Salesforce.com customers.

Sorted and Saved Searches

For most sales managers, the challenge is simply to focus their sales teams on the greatest opportunities while minimizing administrative work, such as data re-entry.

A project lead management application should include features and functionality to automatically prioritize or qualify opportunities and customize workflows. Qualifying projects is the first step in the sales workflow. Companies must set priorities on which projects to act on first. An optimized workflow makes data easy to access and easy to search with specific data points, while eliminating double entry and facilitating opportunities. With the capabilities available in today's lead management

applications, companies can customize construction project data to prioritize leads and update information within the sales workflow.

One of the simplest ways to track sales force activities or manage new opportunities is to use preferred filters, known as Default Saved Searches in the Dodge Global Network [Network], to create a saved search.

For example, a sales rep for a manufacturer or distributor of precast components might want to focus on all new construction projects in the healthcare and higher education markets over \$5 million on the West Coast.

Once the preferred filters are established and the search is saved, the Network is set up to email regular updates of potential projects and create tracking lists. The tracking lists identify projects in planning and bidding stages that sales reps can follow up on at appropriate times.

Every Network subscriber has a Default Saved Search initially set up in the system that includes all projects in a specified subscription geography for the past 30 days. Users can create an unlimited number of additional searches for each sales area or they can create multiple searches that target different business opportunities.

Also, look beyond the factory settings to support your workflow. Dodge has an expert team available to help customize settings to save time and facilitate a more successful lead prioritization workflow.

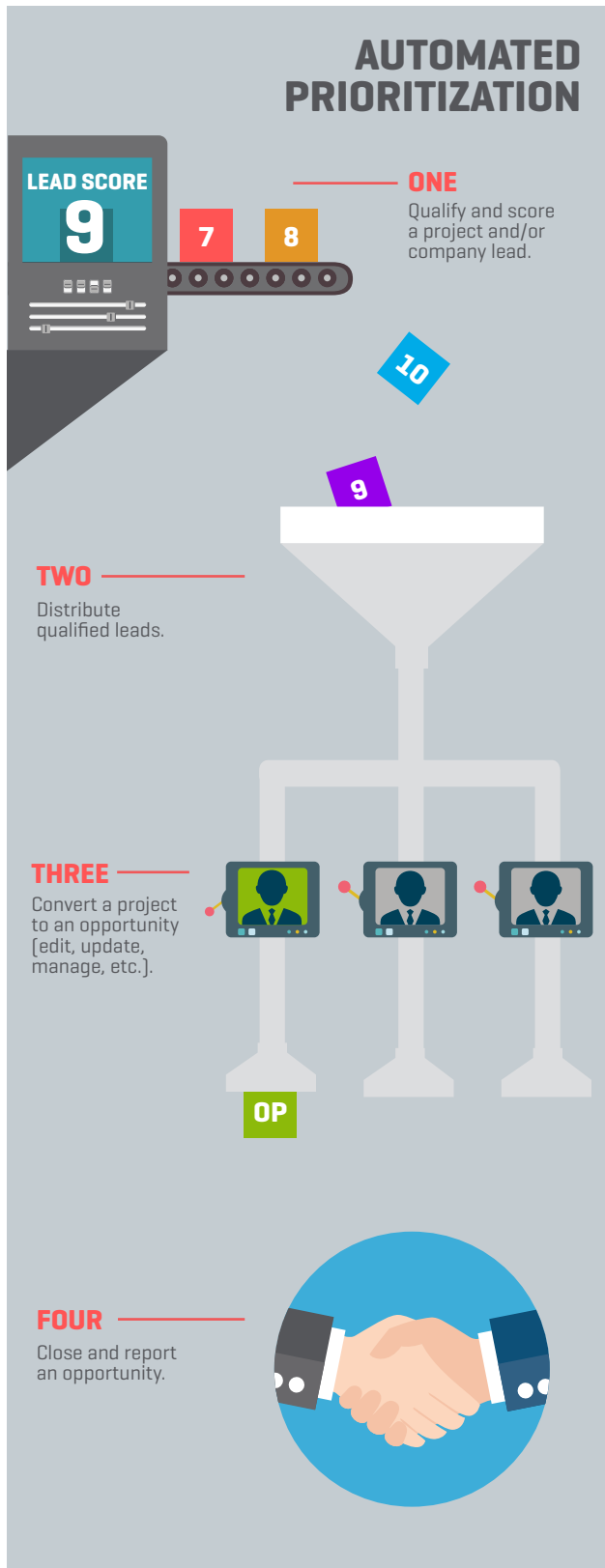
The next level of integration is to immerse project lead data into a sales force automation [SFA] or CRM application.

Automated Prioritization

A lead management application should:

- 1) qualify and score a project and/or company lead,
- 2) distribute qualified leads,
- 3) convert a project to an opportunity [edit, update, manage, etc.] and
- 4) close and report an opportunity.

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Tim Waal, vice president at Ingenium Technologies Corp., explains, "If you deploy Dodge and want to measure effectiveness, you should be able to prioritize and formalize the selection process."

For instance, a manufacturing customer might prioritize its lead data as follows:

Priority A] Search all medical/educational projects in design, greater than \$50 million where the listed architect is an account in the customer's CRM.

Priority B] Identify all multi-residential projects bidding within the next 60 days from the current calendar date that are greater than \$10 million.

Priority C] All projects in bid with a low overall construction value, and none of the manufacturer's products are listed in the specifications, but are applicable to the scope of the project.

"As well, it should be able to manage regular updates," emphasizes Waal. "A lead pipeline like Dodge is dynamic. It records 500,000 projects annually and connects these to 1.5 million names of owners, architects, engineers, subcontractors, landscapers, etc., with 5,500 daily project updates. If your database is not updated regularly, it quickly becomes irrelevant."

ConstructionPoints from Ingenium is an example of a lead management application that is designed for construction product manufacturers, distributors and construction service-oriented businesses. Specifically, ConstructionPoints manages data products provided by Dodge. It combines a daily news feed, lead management features, CRM and flexible data integration management tools into a single application. Essentially, the application synchronizes Dodge information to a company's established business priorities.

"We assign a wide variety of attributes to create layers of filtering options for our customers. A sales rep in Southern California might only want to see projects over \$50 million for a specific market. A rep in rural Nevada may have a minimum project value of \$0—he wants everything," explains Waal.

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Integrating construction lead data to a receiving platform, whether that's a CRM, ERP or financial system, is not straightforward. The concept of a project record is foreign to the framework of these systems.

By combining filters such as zip codes, project types, project values and product specifications, ConstructionPoints can be automated so that the customer doesn't have to manually select projects or directly interact with the data.

Key Integration Strategies

"Integrating project lead data to a receiving platform, whether that's a CRM, ERP or financial system, is not straightforward. The concept of a project record is foreign to the standard object framework of these systems," explains Waal.

In software development, an object is a container or physical manifestation of a record or table. CRMs typically work with four primary objects: accounts,

leads, opportunities and contacts. Project lead data introduces the project record.

"For instance, if there's a hospital to be built at 55 Main Street, we've seen instances where the hospital project record has been loaded directly as a lead or opportunity. Both are mistakes," he says.

A lead in Salesforce is a business card—the name of a person or company. It's not a record that describes a construction project that is being designed or built. An opportunity in Salesforce might have some attributes that describe the construction project [location, etc.], but the opportunity really describes the sale, who the account is that you are selling to, the product/service being sold, such as aluminum pre-framed windows, the price point and possibly the closure probability.

With ConstructionPoints for Salesforce, Ingenium has created a connection between the opportunity, the account and a Dodge project. In fact, ConstructionPoints for Salesforce is built on the Force.com platform, which allows users to work in Salesforce with Dodge data just as if it were in the Dodge network.

Waal adds, "We've created a relationship and connection between the opportunity, the account and the Dodge-listed project. Inside Salesforce, we utilize custom objects that establish relationships between the Dodge project and the core Salesforce objects [accounts, leads, opportunities and contacts]."

The results are impressive. Parksite, a leading distributor of interior and exterior products that include DuPont Corian and Zodiaq, DuPont Tyvek, railing, decking, roofing, siding and trim, adopted ConstructionPoints for Salesforce in mid-2014 as a way to eliminate the manual entry of Dodge data into Salesforce.

Chad Marlowe, commercial sales support manager at Parksite, says, "We see Dodge data in Salesforce. If we bring a project in at one stage and it changes tomorrow, the application updates our opportunity per our personalized filters. We don't have to move between separate and disconnected Dodge and Salesforce apps anymore. All the data that's reported by Dodge is accessible within our Salesforce application."



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Marlowe's team is also now able to expand cross-product opportunities. He says, "When we evaluate a hospital project that needs Tyvek, we might also see a need for railings, and we can automatically alert the other business groups. It really opens doors to cross-product sales."

The True ROI of Lead Data

An improved, intelligent lead workflow allows product manufacturers, distributors, service suppliers and contractors to see the value of their Dodge lead data. It helps justify the continued investment in a lead service.

If a company spends \$X on a lead generation source such as Dodge, does it get \$3[X] in revenue? Most companies know it makes sense because a lead generation database contains so much information, and with prioritization tools, allows them to sell more efficiently. However, conventional approaches to lead generation do not typically provide a way to measure the value of that investment.

When asked by the executive management team about the ROI of ConstructionPoints for Salesforce, Parksit's

Marlowe replied, "The application takes the place of two to three people that we would have had to hire to do the same thing. We have streamlined our workflow, eliminated manual data entry, and we're able to broaden our opportunities across a single project. It's easy to mine for new information and create reports. It's really increased our opportunities and the volume of qualified projects that we can pursue. Our sales calls are more effective sales calls and our close rates have improved tremendously because we can focus on more qualified projects."

Parksit is not alone. Forward-thinking companies, such as Stanley Black & Decker (see below), are asking more of their lead generation data pipeline, taking advantage of today's analytics tools to generate new opportunities and drive productivity.

Are you making the most of your lead generation data? If not, it's time. For more information, visit <http://construction.com/dodge>.

The Game Changer: Manufacturer Pushes the Envelope of Integrated Lead Generation

Stanley Black & Decker, a manufacturer of industrial tools, fastener solutions and much more, adopted ConstructionPoints for Salesforce and gained innumerable advantages.

Jessie A. Hanna, field operations manager with Stanley Black & Decker, says, "Our initial goal was to connect our lead generation source to Salesforce, our primary sales tool. This connectivity allows us to better search out multiple project opportunities and share information instantaneously with our jobsite database."

With the application, the Stanley Black & Decker team can evaluate what

fasteners a specific job might require, if there is a need for specific power tools and if the structural engineering company on that job is one with whom they have a business relationship.

Hanna says, "With ConstructionPoints, we can see Dodge data quickly and easily. The biggest benefit is the ability to automatically pull information into our jobsite database. We used to do this manually. Now, with the click of a button, it's all in one resource. The ease of communicating the individual jobsites has been a big win."

Currently, ConstructionPoints is used by the firm's field engineers as well as its nationally based sales population.

Now, Stanley Black & Decker is working with Ingenium to take its integrated sales workflow to the next level by adding a scoring system. "Every day, we're trying to manage a lot of data," explains Hanna. "We want the ability to push opportunities to broader sales teams that don't have the time or tools to mine through data. Scoring would be a game changer, giving our entire team the tools they've never had."