



The Salesforce-based CRM-solution
for the construction industry



GERMAN
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THE CHALLENGE

Product manufacturers and suppliers within the construction industry usually work in multi-stage sales processes as part of construction projects. Their customers are not only buying, but also non-buying customers who need to be handled as project participants. Making it important to involve and be aware of every participant of the project. This type of sales is called object or project sales. Interestingly there is almost no information around this type of sales, although it requires a lot of know-how from the sales department with regard to customers and the strategic processing methods. Industry know-how, strategic skill and a great deal of commitment is required in order to successfully manage a construction project in the different phases in a way that clients, investors, project developers, general contractors, planners, architects,

end users, processors, etc. are dealt with at the most decisive point in time.

In addition, a wide variety of customers and their interrelationships must be mapped in the project, which in turn is known as network sales.

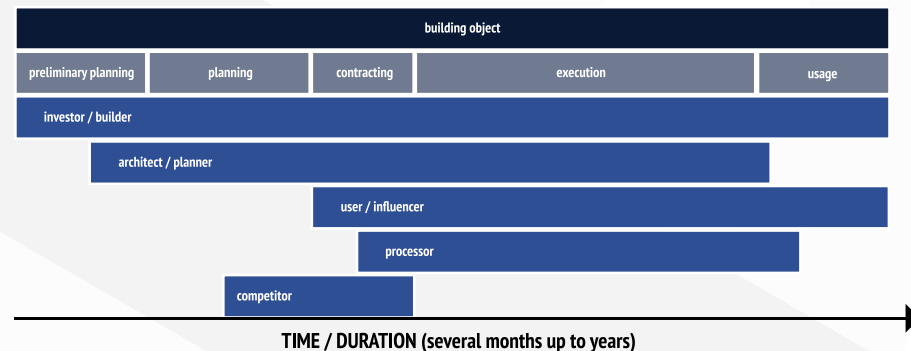
The possibility of holistically mapping this type of sales in CRM was previously only possible using strong customizing and individual customer solutions and was therefore associated with high costs and time expenditure.

THE CHALLENGE

CONSTRUCTION PROJECT CENTRICITY

As a construction project develops, the manufacturer often does not know, who will ultimately be his customer in the project. That means that a construction project is processed in different stages. In terms of sales, various project participants, both buying and non-buying customers, must be taken into account.

Usually, a CRM (Customer Relationship Management) is structured in a customer-centered way. That means that a project (opportunity) must always be assigned to a customer. However, this is rarely the case in property sales. In multi-level sales and especially in the construction project, there is both customer and project centrality. This is not mapped by a standard CRM but must be adapted to the customer requirements by customizing measures. Such a project thus acquires a high level of complexity, which is reflected in increased time and costs expenditure.



CUSTOMER FOCUS

In order to optimally support the customer, marketing and sales should work hand in hand. Thus, lead and marketing automation pass on (Marketing Qualified Leads) customers to the sales department for further management. The latter is further supported by marketing in a digitized environment and creates its own sales touchpoints with the customers. Touchpoints can only develop the most added value if customer requirements are met and addressed at the right time. In this process, it is important to link the customer topics with projects in which the customer is involved. On the sales side, this is achieved through a multitude of follow-ups, tasks, and deadlines that must be monitored, coordinated, and executed by the sales representative. The challenge is not to lose the overview within this process.

SOLUTIONS

The development of a solution specific to the construction industry started with a market analysis of existing tools and the understanding of the sales model “object sales / network sales”, in order to map this in a CRM system and generate customer added value. The following points were particularly pursued as added values:



Innovative strength based on a CRM platform that is constantly being further developed in response to customer requirements and regular releases.



Customer Relationship Management approach to map the project and the entire customer journey.



Integration of different systems and best practice from a large customer community.



Profitability through digitization and automation.



Quality thanks to external quality control, market penetration thanks to high user acceptance, and future viability thanks to innovation and know-how on the market.

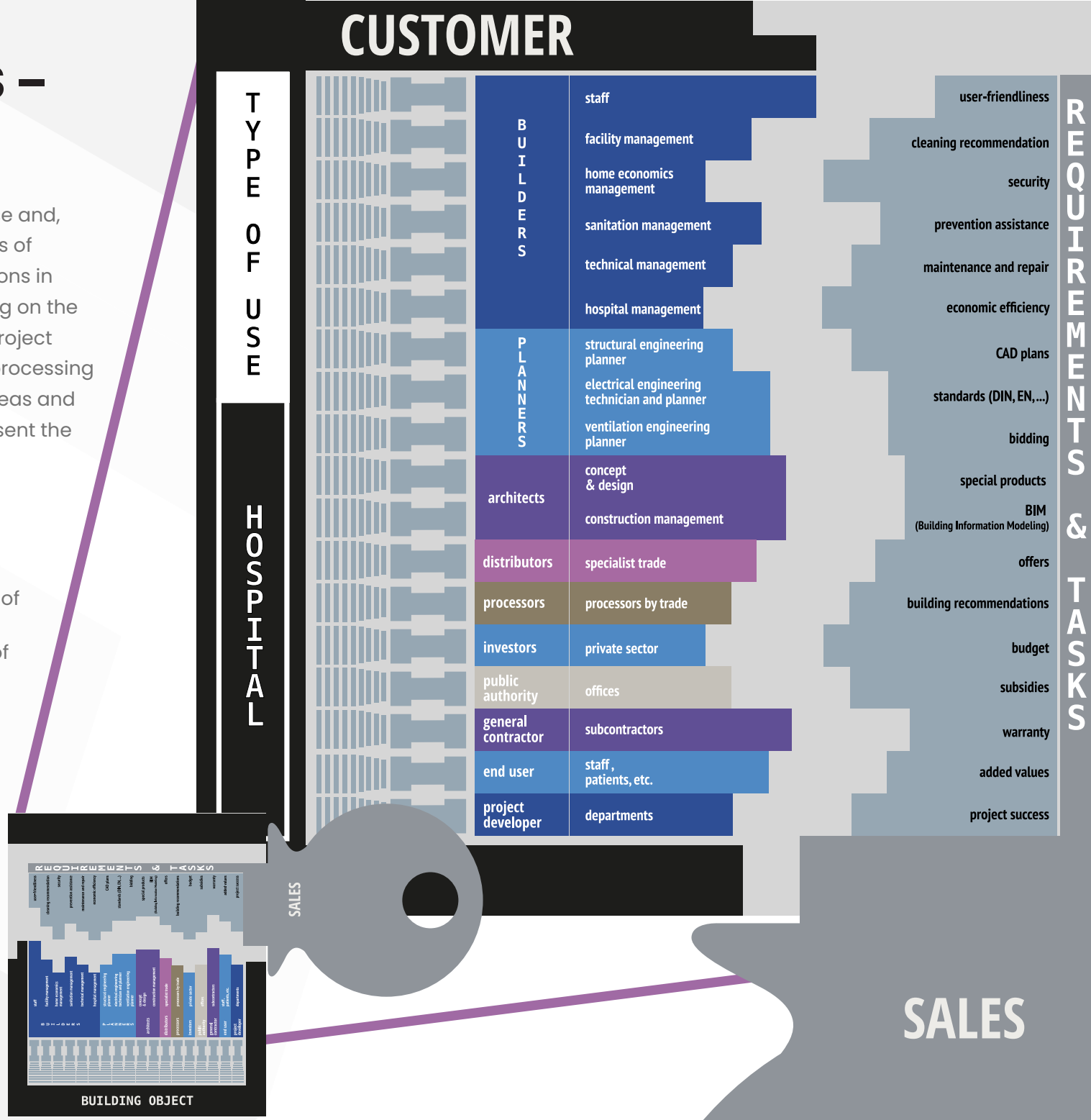
PROPERTY SALES – THE CHALLENGE

Building objects differ in their type of use and, depending on this, are of different levels of complexity, which require different actions in the various planning phases. Depending on the type of use of the building object, the project participants and their needs for sales processing differ. The special know-how of both areas and the strategically best processing represent the challenge for the sales department.

Example: Hospital

The building object, in this example a hospital places a number of tasks and requirements on the sales department of a construction material manufacturer, which can be represented in the form of a key-lock principle.

The lock has an individual code, which depends on the type of construction project (type of use) and the various project participants. Opening this lock requires the appropriate key, that takes into account the different needs of customers.



BAUCORE – A HOLISTIC SOLUTION

In order to offer a maximum added value to customers in every phase of their business, IBS Technology decided not to develop another standalone CRM software, but to build its own app for multi-level property sales based on Salesforce. Salesforce offers the customer a comprehensive platform with tools for all aspects of CRM, depending on their needs. This provides a solution that the customer can expand in a modular manner according to his needs.

IBS Technology GmbH has developed BauCore as a basis for the project business. The solution is based on industry know-how and the planning phases of architects according to German HOAI (Fee Structure for Architects and Engineers), which means that projects are processed in line with the construction phase. The CRM user is notified of his most urgent activities and provided with recommendations and activity suggestions. This approach eliminates the need for the salesperson to create and maintain many resubmissions, which take up a considerable amount of customer active time in the daily sales routine. By automating the object monitoring, the salesperson can process more projects, has a better overview of the next steps and even in the case of a substitution, each colleague has a complete overview of urgently needed to-dos and project statuses.



PROPERTY SALES – THE SOLUTION: BAUCORE

BauCore is built on Salesforce's CRM platform and serves as a "enabler" to the construction industry. It connects all required Salesforce tools with the construction project and also automates the sales processing. Due to the industry solution, there is no need for time-consuming customizing during implementation and every customer receives constant improvements and innovative solution approaches from the best

practice of a large customer community, due to the underlying license model. Time and money is saved and necessary change processes are simplified by using the industry language.



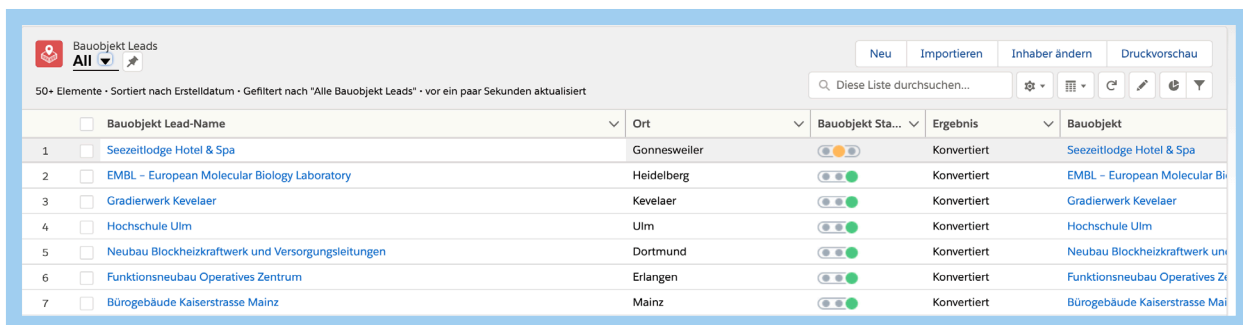
CONSTRUCTION LEADS –

DIRECTLY IN THE SYSTEM, QUICKLY EVALUATED AND PROCESSED IN A RESOURCE-OPTIMIZING MANNER

In the initial project phase, the sales department receives the information as a construction project lead, which can be imported directly into the CRM by external data suppliers. The BauCore traffic light gives feedback on the leads that should be prioritized by the sales team. Parameters such as chances of success, type of object, potential, loyalty of the parties involved, etc. are of major importance.

Added value:

The employee (user) has significant time savings due to the direct connection of external lead suppliers (standard interfaces, e.g. to IBAU, ...) and the project data is automatically available in the system. The simple lead processing and conversion saves time, which in turn the employee can use for sales activities. The quick assessment of lead quality by the BauCore traffic light leads to profit-maximizing use of sales capacities. These factors drive efficient workflow and cost savings.



<input type="checkbox"/>	Bauobjekt Lead-Name	Ort	Bauobjekt Sta...	Ergebnis	Bauobjekt
1	<input type="checkbox"/> Seezeitlodge Hotel & Spa	Gonnesweiler		Konvertiert	Seezeitlodge Hotel & Spa
2	<input type="checkbox"/> EMBL – European Molecular Biology Laboratory	Heidelberg		Konvertiert	EMBL – European Molecular Biology Laboratory
3	<input type="checkbox"/> Gradierwerk Kevelaer	Kevelaer		Konvertiert	Gradierwerk Kevelaer
4	<input type="checkbox"/> Hochschule Ulm	Ulm		Konvertiert	Hochschule Ulm
5	<input type="checkbox"/> Neubau Blockheizkraftwerk und Versorgungsleitungen	Dortmund		Konvertiert	Neubau Blockheizkraftwerk und Versorgungsleitungen
6	<input type="checkbox"/> Funktionsneubau Operatives Zentrum	Erlangen		Konvertiert	Funktionsneubau Operatives Zentrum
7	<input type="checkbox"/> Bürogebäude Kaiserstrasse Mainz	Mainz		Konvertiert	Bürogebäude Kaiserstrasse Mainz



ARCHITECT PLANNING THE BASIS OF PROPERTY SALES

For the handling of the project, there are recommendations for action in each phase, which can directly be processed by simply clicking on them. The project phases are automatically updated as the project evolves, and more information is available in order to guide the salesperson in his daily work – projects can no longer fall through the cracks. The dashboard offers the employee a daily view about the projects he has to work on and also the necessary actions.

Added value:

Timesaving through automation – the user has a significant reduction of follow ups. Therefore, able to handle a larger number of projects.



The dashboard displays the following information:

- Project Header:** Bauobjekt: Erweiterung einer Schule. Buttons: + Folgen, Anfrage - Angebot, Inhaber ändern, Löschen.
- Metadata:** Baustadium: Rohbau, Status, Inhaber: Nico Müller, Bauobjekt Status.
- Phase Progress:** Entwurf (active), Ausführungsplanung, Ausschreibung, Entscheidung, Realisierung. A button to mark the phase as completed is available.
- Schnell-Links für Themenlisten:**
 - Beteiligten (4)
 - Anfrage (5)
 - Lvs (3)
 - Projektangebote (3)
 - VA Empfehlungen (0)
 - Bauobjekt-Verlauf (1)
 - Bauobjekt Lead (0)
 - Bauobjekt Status Versionen (8)
- Details Table:**


Details	Maps	Supply Chain	Stakeholder	Navigator	Quote
Bauobjekt Name: Erweiterung einer Schule				Bauobjekt Phase: Entwurf	
Straße: Falkstraße 60				Status:	
Postleitzahl: 60487				Inhaber: Nico Müller	
Ort: Frankfurt am Main				Projekt Koordinator	
- Side Panels:**
 - Status:** Termine, Abschlussdatum der Vorplanung.
 - Empfehlungen:** Denk dran, Abschlussdatum der Vorplanung erfragen.
 - Aktivität:** Chatter, Neue Auf..., E-Mail, Anruf pro..., Neues Er..., Aufgabe erstellen..., Hinzufügen.

OBJECT OVERVIEW BY TRAFFIC LIGHT SYSTEM

The salesperson is offered various options to structure his work. The BauCore traffic light system indicates critical status updates for every project. This can be displayed by project phase or in a list view. The automated recommended action in the construction object eases daily work, substitution situations and the onboarding of new employees. Minimized data input helps to increase sales-active time. The chances of winning projects increase due to the significantly more structured way of working.

Added value:

The structured way of working increases the chances of winning projects and therefore revenue increase should be expected. In addition, substitution situations are greatly simplified and missing to participate in a project is virtually impossible. The onboarding of new employees is shortened, making them productive sooner.



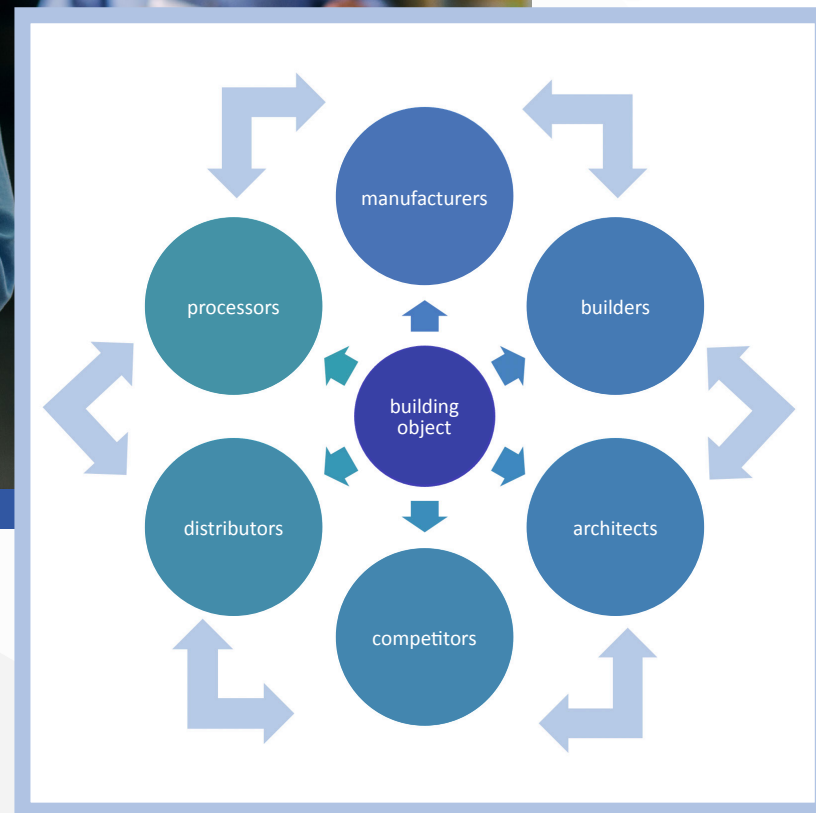
The image shows a person in a grey suit holding a white hard hat. In the background, a laptop displays the BauCore software interface, which is a project management tool for construction. The interface features a traffic light system to indicate the status of various projects across different phases.

Bauprojekte Zuletzt angezeigt ▼					
32 Elemente - vor ein paar Sekunden aktualisiert					
Vorplanung (6)	Entwurf (3)	Ausführungsplanung (4)	Ausschreibung (8)	Entscheidung (11)	Realisierung (0)
Telekom Filial Mainz	Lufthansa Lounge MUC Ter...	Rewe Mainz	Neubau Blockheizkraftwer...	Erweiterung einer Schule	
Post Mainz	SeniorenParkResidenz Mü...	Rewe Dortmund	Hochschule Ulm	Seezeitlodge Hotel & Spa	
DHL Lieferzentrum	Paul Carre - Rohbau	FÜRSTENHÖFE DÜSSELDORF...	Maria Ward Schule	Funktionsneubau Operativ...	
Aldi Werk		Neubau und Sanierung de...	EMBL - European Molecu...	Gradiertwerk Kevelaer	
Audi Zentrum Stuttgart - N...			Neubau Pflegeheim "Haus ...	Neubau Krankenhaus Aich...	
Paul Carre - Putzarbeiten			Hamburg Wasser Projekt	Messe Nürnberg	
			Haupterschließung Westfal...	Kaufhaus in Frankfurt	



SUPPLY CHAIN VIEW & RECOMMENDATIONS FOR ACTION

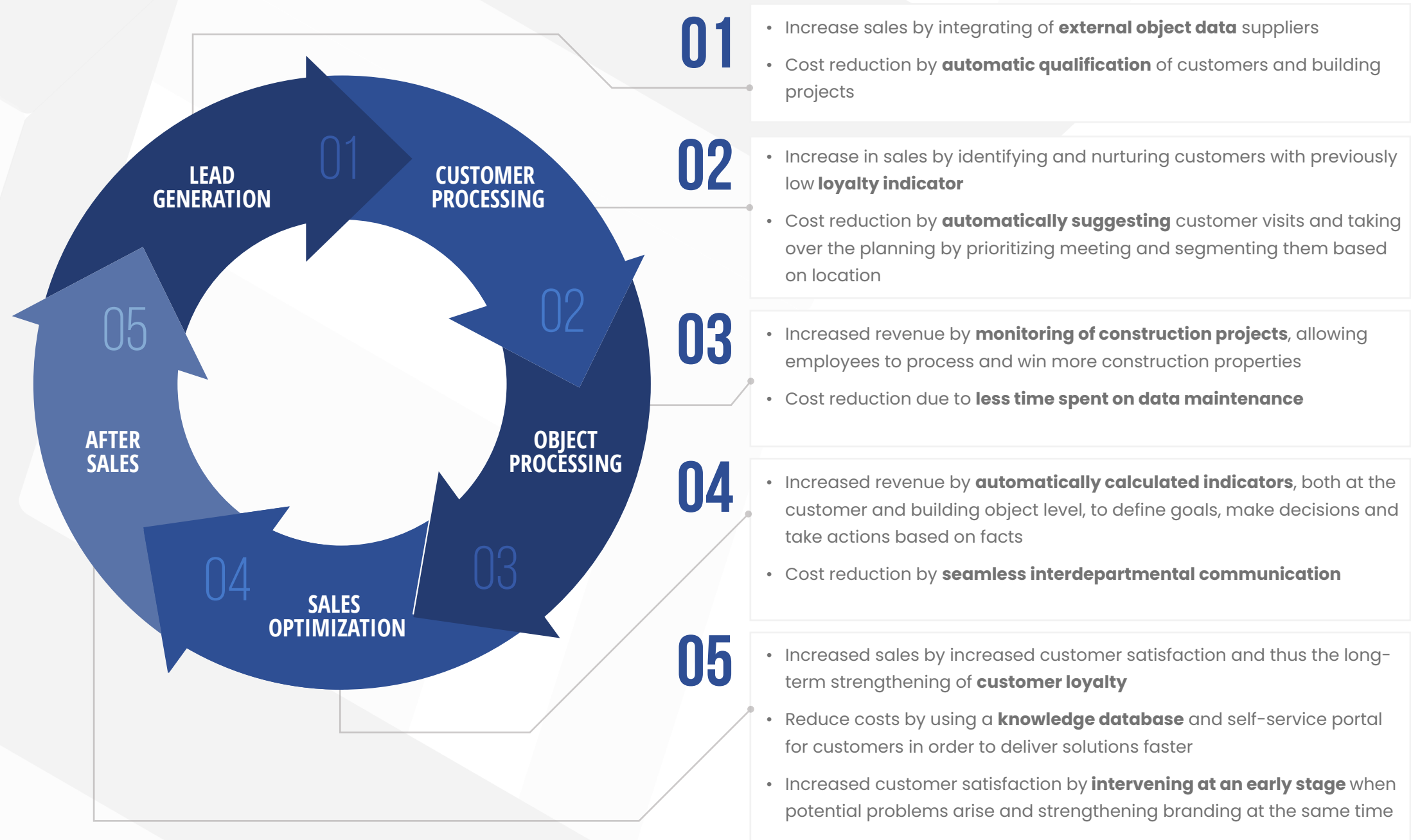
Depending on the project status, the various project participants have more or less influence on what is happening with the project. To visualize the network of relationships within the project, BauCore maps a Supply Chain diagram from the collected data. This helps increase the insight into the various supply chains and the critical chains that require special attention.



Added values:

By showing the critical paths, the project's probability of winning can be better estimated, and processing can be planned more efficiently.

ADDED VALUES: BUILDING OBJECT & CUSTOMERS IN ONE VIEW



INITIAL GOAL ACHIEVED?



Holistic CRM solution to map the project and the entire customer journey.

BauCore, in conjunction with Salesforce, maps the entire sales & marketing process and furthermore the interrelationships in the construction project. The results of won and lost projects are available and offer the possibility to derive KPI's of successful project processing for sales.



Innovative strength

BauCore offers innovative solution approaches to automate and improve property sales. Processes are not only mapped, but also continuously improved, supplemented and expanded through solution approaches, recommendations for action and customer-oriented feedback.



Profitability through digitalization and automation

BauCore offers automated object processing and thus creates more sales-active time, which is reflected in the increase in projects to be processed and the increase in profit rates. This leads to increased sales efficiency and profitability.



Quality, market penetration and future viability

In the future, BauCore will be made available in Salesforce's AppExchange and has passed through high-quality checks, which has high quality standards. This additional sales channel will further increase market penetration. The exchange with the construction industry will constantly drive further development.



Synergies from different systems and by best practice from a large customer community

The interaction between BauCore and Salesforce creates added value and synergies for both solutions. BauCore offers a construction industry solution for the Salesforce platform and Salesforce offers all the functionalities of a holistic CRM. The large customer community contributes to a constant development and due the regular upgrades give further added value to its 170,000 Customers.






CONTACT US

If you have any questions about any of our services or products, or just want to learn more about us, you can visit our website or contact us directly. You can also follow us on LinkedIn, Facebook and Twitter to get the latest updates.

IBS Technology

 Schwarzwaldstrasse 122
60528 Frankfurt am Main
Hessen, Germany

 www.ibs-technology.com

 linkedin.com/company/ibs-technology-gmbh

 facebook.com/ibstechnology

 [@ibstechnology](https://twitter.com/ibstechnology)

CONTACT

Simone Hofmann

Head of Marketing and Sales

 +49 152 0170 8920

 shofmann@ibs-technology.com