



CRM

For
Architects
Engineers
Contractors
Construction Suppliers

Director of Business Development – Hedrick Brothers

“We have so much coming through the pipeline, and Project SalesAchiever CRM helps us to stay on top of things. It’s important for us to stay very organized and make sure nothing slips through the cracks.”

Case Study: Hedrick Brothers

Construction firms often require a CRM system that provides strong schedule coordination and project management functions, while being easy to use both in the office and on job sites.

Hedrick Brothers, named 2012 Florida Builder of the Year by the American Institute of Architects, selected Project SalesAchiever CRM based on these features.

“Our last CRM/project management software was so complicated that I never used it,” said Cheri Pavlik, Director of Business Development. “We needed something that was more user-friendly and was geared towards construction.”

Since implementing Project SalesAchiever CRM, Hedrick Brothers has experienced improved tracking and oversight of project opportunities, existing projects, staff assignments, and management reports.

“We have so much coming through the pipeline; it helps us to stay on top of things,” Pavlik said. “It’s important to us to stay very organized and make sure nothing slips through the cracks.”



- Prospects
- Clients
- Projects
- Bids/Estimates
- Service Dispatch
- Work Orders
- Activities

5 Tips for Maximizing Your CRM System

1. Import project leads from key industry databases into the system. Our software imports data from Reed Construction Data and McGraw-Hill’s Dodge Lead Center.
2. Log your past bid quotes to facilitate future proposals and track current project metrics. Our Quotations tool simplifies this process.
3. Connect with your field team with a central schedule database. Our Dispatch tab allows users to see each employee’s location at a glance, making it easier to communicate client needs or other urgent matters with the appropriate employees.
4. Budget for the implementation and maintenance costs of using the system over many years. Some firms abandon their CRM systems due to the high maintenance costs. We are committed to providing a high-quality product at prices that are affordable to firms of all sizes.
5. Consider global applications. With an ever-increasing number of small- to mid-sized firms expanding overseas, it is important to have a software tool and technical support team that are available around the world. Our teams in the United States, Canada, and Europe know the intricacies of working in multiple countries. We designed our software to accommodate this diversity, and our global support team is ready to help with any challenges you encounter.

Call 1-888-523-2568 for a demonstration

Common Sense Solutions

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