

PiSA sales for the Contract Business

The CRM solution for the building and building-supplies industry

The nature of property-related contract business tends to be highly complex. Whereas most other industries are customer-centric, the focus in the contract business is on the property. It is not surprising, therefore, that conventional CRM systems are unable to duly satisfy the demands associated with this type of operation.



Property management

The PiSA sales CRM offers you a specifically dedicated CRM template that provides a consolidated and well-structured view of all properties, sub-properties, and trades as well as a wealth of linked information. The system enables the transparent management of relationships between all the entities involved (customers, planners, developers, sub-contractors, dealers, processors, tradespeople, etc.) in terms of their connection to a given property. With all the relevant information at your fingertips, you will always know exactly who your point of contact in any given situation is as well as having a clear and comprehensive overview of all past and present inter-contact behavior.



The PiSA sales CRM also fully satisfies the special demands of three-tier sales operations. The system will help you to identify non-purchasing entities (such as developers or general contractors), opinion directors (e.g. planners and architects), and purchasing customers (dealers, processors, and customers, etc.) and to gain better knowledge of their particulars. You will be able to immediately pinpoint those parties who consistently do a good job in their respective field of operation, which manufacturers issue invitations to bid, and who the contracts are awarded to.

Procurement, segmentation, and qualification processes are significantly simplified with the aid of imported data about invitations to bid plus property data (e.g. from the ibau network), for which the system allows you to run efficient duplication checks and apply extensive filtering options.

Both your field and in-house sales staff will benefit from the centralized provision of this data on a common knowledge platform.

Mobile CRM

You will, of course, also have remote access to property and customer data, to documents, appointment schedules, contact information, and much, much more on your notebook (online or offline), tablet, or smartphone.

Competition watch

The competition-analysis function in the PiSA sales CRM will put you in a position to maintain a 360° perspective on other market participants. Automatic reporting on their strengths and weaknesses, on the competitive situation (where and when you have been in competition with other businesses; who landed which contracts), on pricing by your competitors, or on rival-product listings will all enable you to act targeted. Information of this kind helps not only your sales staff, but is a valuable asset for management or the product development team.

Analyses and reporting

The PiSA sales CRM gives you everything you need for highly efficient analyses and meaningful reporting, thereby making your market more transparent and making even complex evaluations an easily manageable proposition. For example, it lets you view anticipated revenue in terms of the products and services offered for individual properties. The system will help you to optimize processes across the entire operating spectrum - from initial sales activities all the way to customer-development campaigns.

sales PISA
Sales Administration Extras View ?
Keyword

Cockpit Group calendar Calendar Activities Contacts Sales Marketing Objects Back office End

✕ Neubau: Bürogebäude der Fa. I

Object

Keyword

Number P-14-008829

Builder... Hono Gerätebau GmbH (Grafing)

Dealer... Baustoff Müller GmbH (Bergisch Gladbach)

Office building - Hono Gerätebau

Status... Completion phase

Build developer... Joseph Trichtermann Bauunternehmung C

Type Commercial project

Recorded on 2017/04/03 16:21

Planner... Krien Bau- und Planungsbüro GmbH (Köln)


Master data Technical details Crafts Sub objects Services Contacts Activities Documents Addresses Trace back Sales Collaboration

Indicators		Main address
IBAU number	1632777	
Construction stage	ready planned	
Announcement type	limited by individual crafts	
Origin	Internet	

Scheduling		Revenue	
Announcement start	2017/05/08	Budget (€)	2,500,000.00
Submission date	2017/08/30	Exp. revenue (€)	20,584.00
Allocation date	2017/10/17		
Construction start	2017/12/18		
Construction end	2019/02/28		
Language 1	German	Language 2	English

Description

Picture



Status set on 2017/06/06 14:28

Status info

General

Overview

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Indisputable benefits

- ✓ centralized, evaluable management of project and property data lets you focus your activities more effectively on key profit-generating contracts
- ✓ 360° perspective on properties, stakeholders, histories, etc., including quick access to required information
- ✓ forecast analyses, including at the individual-property level
- ✓ duplication checking of property data, contacts, and documents
- ✓ access anytime, anywhere to CRM data, documents, and contacts (online or offline)
- ✓ language, currency, time-zone, and unit-of-measure definition options

Property management

- ✓ clear allocation of a property or project number (ibau code)
- ✓ key contacts immediately identifiable
- ✓ status management of individual properties, including workflow
- ✓ management of different property types (e.g. public or private projects)
- ✓ immediate accessibility of core information (building phase, bid type, origin, start of bidding phase, submission deadline, contract-award date, building start and completion dates, budget, anticipated revenue, etc.)
- ✓ technical details, trades, sub-properties, delivery/performance items
- ✓ property-specific management of all relevant contacts and competitors
- ✓ property-specific activities history, document management
- ✓ follow-up scheduling; escalation mechanisms (deadlines)
- ✓ overview of all business opportunities, quotes, and contracts associated with a particular property
- ✓ management of selective addresses (e.g. place of performance, delivery address, billing address)
- ✓ individual definition of property-assessment attributes, description of property/project
- ✓ property calendar showing all schedule information, milestones
- ✓ radius search (e.g. for sourcing suitable service providers in close proximity to a property, using freely definable filters) comprehensive filtering options for property and relationship data

ibau interface

- ✓ configurable ibau data importing
- ✓ high-performance duplication checking of property data
- ✓ click-of-a-button setting of threshold values for duplication recognition
- ✓ checking of property name, ibau number, location, etc.



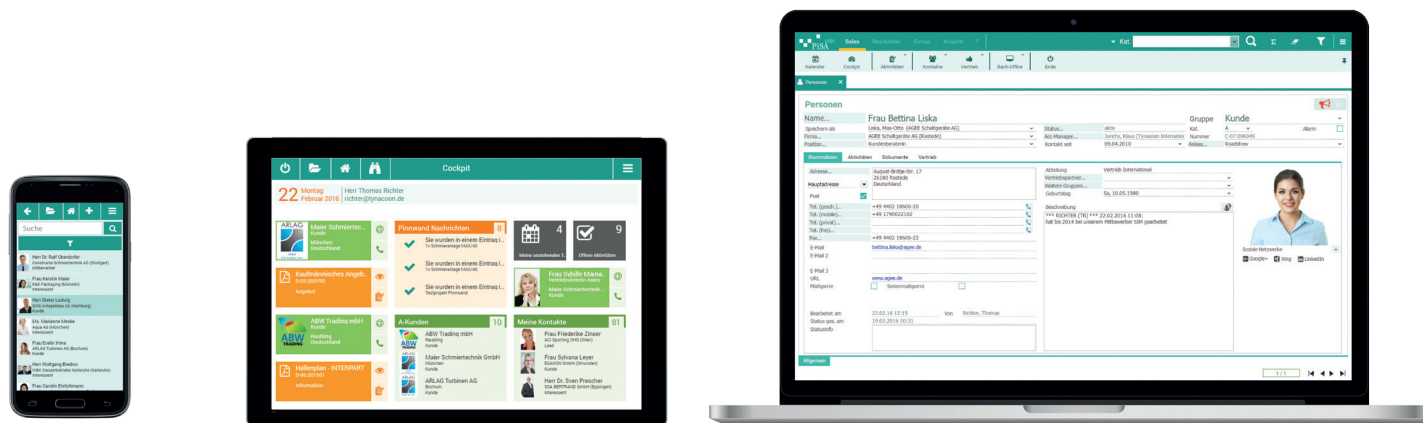
ibau

Forecast analysis

- ✓ information listing of all opportunities, quotes, and contracts - either comprehensive or at the by-property level
- ✓ sales funnel featuring graphic analysis of the individual sales steps
- ✓ reliable sales forecasting based on the automated (or manual) evaluation of individual cases; exclusion of individual business opportunities or quotes from forecast

Document management

- ✓ management of documents of any format (Word, PDF, graphics, videos, drawings, etc.)
- ✓ version management featuring version history within the document information record (e.g. quotes, technical drawings)
- ✓ saving of documents drawn directly from Microsoft Office applications in the PiSA sales CRM and their processing within the system
- ✓ importing of individual documents and document folders using the drag-and-drop function
- ✓ doublet checking of documents



Mobile CRM – online & offline

- ✓ local or remote access to your CRM data
- ✓ online access via smartphone, tablet, or notebook; offline access via notebook

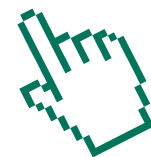
Fit for international coverage

- ✓ UNICODE-enabled, supports any language (including Cyrillic, Farsi, and Chinese characters, among others)
- ✓ supports international currencies (project currency, company currency) and automatic currency conversion
- ✓ time-zone management, supports international units of measure



We will be pleased to advise you!

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Request CRM information package:



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