

Lexnet Constructs Successful Solution For Swinerton Builders

Swinerton Inc.

www.swinerton.com

Headquarters

San Francisco, CA

Type of Business

Construction

Number of Employees:

1,500

Number of Sales:

1,000

Dollars Revenue

\$2 Billion

Software

Sage CRM SalesLogix

“We have tremendous confidence in Lexnet. They have introduced us to best practices in sales and marketing, allowing our business development teams to become better at what they do. Lexnet’s knowledge and project management are flawless.”

Swinerton Builders is a premier commercial building contractor with 14 offices in seven states, and headquartered in San Francisco, California. For over a century, the Swinerton Builders name has represented quality, innovation, and outstanding customer service. The company’s projects range from commercial office buildings like the Gap Worldwide Headquarters, to entertainment industry projects like the Dreamworks Animation Campus, to healthcare facilities like the Stanford University Medical Center.

Due For A Remodel

As a large, national contractor, Swinerton performs work for large, national corporations. Management found it was losing out on additional opportunities with these clients because the company was not always able to capitalize on its past successes. For example, Swinerton’s Los Angeles office had worked successfully on several local projects for a major national bank. When the Portland division of that bank began looking for a contractor, Swinerton’s business development team in Portland could have strengthened their position with the client by promoting their experience and success in Los Angeles. However, the Portland office had no easy way of knowing about the Los Angeles projects, and the opportunity slipped away.

Every office had its own system, or systems, for tracking contacts. Some offices used ACT! by Sage, others relied on spreadsheets, others simply used Outlook. Mikki Witter, systems administrator, and Jon Marks, manager of applications, were charged with the demolition of these crumbling systems and the construction of a solution that would allow the company to better capitalize on its successes.

Laying The Foundation

Witter and Marks embarked on a comprehensive selection process, reviewing more than a dozen CRM solutions before narrowing the field down to three:

Sage CRM SalesLogix, Goldmine, and Oracle CRM. Contenders were rated on their usability, extensibility, underlying architecture, user-count scalability, and price point. Sage CRM SalesLogix emerged the clear winner. Lexnet Consulting Group of San Francisco was selected as the business partner with the experience and expertise to implement it.

Contracting The Best

Because of Lexnet’s experience, Sage CRM SalesLogix was implemented with very few customizations. Lexnet’s consultants demonstrated how to relabel fields to suit Swinerton’s business operations, and how to layout each screen to optimize the data entry tasks of each business development manager. “I was impressed by the due diligence demonstrated by Lexnet as they installed and implemented Sage CRM SalesLogix and as they trained us how to put it to best use,” says Marks.

Prior to going live with Sage CRM SalesLogix, Lexnet set up a test environment at Swinerton,



Sage CRM SalesLogix allows Swinerton to capitalize on opportunities they might have missed before.

allowing users to experience and test the system in advance. Additionally, Lexnet helped coordinate imports to draw the data from the many disparate systems into Sage CRM SalesLogix and the many duplicate records were corrected.

“When we started this project, I had one rather humble criterion

for success: to send only one Christmas card to each client, instead of the half dozen or more we ended up sending from various divisions,” laughs Marks. Has Sage CRM SalesLogix succeeded? “I am pleased to say we’ve far surpassed that goal.”

Both Witter and Marks make a point to attend the annual Sage CRM SalesLogix users conference hosted by Lexnet. At the last such conference, users were introduced to a product that allows them to scan business cards directly into Sage CRM SalesLogix with no rekeying. Swinerton now uses the product and Witter says, “It saves our team hours of data entry, and prevents the inevitable typos.”

Leadership. Experience. Net Results.



Building Relationships

Like most successful organizations, Swinerton relies on loyal customers for a majority of its revenues. Sage CRM SalesLogix is the tool that allows Swinerton to nurture those relationships and grow them into new business in new regions of the country. Now, teams from Hawaii to Connecticut share the same database of information and can use that knowledge to build strong alliances with their customers.

Sage CRM SalesLogix gives Swinerton visibility into its vast network of accounts and contacts across the country. Now, before business development managers meet with a new prospect, they can query the Sage CRM SalesLogix database to see if Swinerton has done work for the account before in another region, or perhaps whether they have worked with the same architect or design team. "SalesLogix has given us a global view of each of our contacts," says Witter, "It has allowed us to capitalize on opportunities that we might have missed before."

Whom you know counts for a lot in business. Using Sage CRM SalesLogix, Swinerton's business development team builds and stores a list of associates for each account. An associate might be a former employee, current co-worker, or architect who worked on the project. As business development managers court clients, this list of associates can prove invaluable for personalizing relationships and reinforcing Swinerton's solid reputation.

The relationship-building benefits Sage CRM SalesLogix delivers extend to Swinerton's internal customers as well. There is an increased team atmosphere as business development managers cooperate and collaborate to win deals and increase customer loyalty. "SalesLogix served as the catalyst to turn our business development managers into a team," says Marks. "Now they all work from the same database, share the same information."

Witter agrees, "We're now able to see who we know and what we know. We're not stepping on each other in a struggle to get current information any longer."

Power Tools

While centralized lead tracking began as the main objective of Swinerton's CRM initiative, the business development team now relies on the system to record and follow opportunities, and they make extensive use of the calendar, email, and alerts functions. Business development managers access Sage CRM SalesLogix Remote Client on their laptops, synchronizing their databases each time they return to the office. It even runs on the PDAs of many staff members, ensuring the calendars and contact information is always on hand and current.

Marketing Campaigns

Swinerton's marketing department relies on Sage CRM SalesLogix as they launch targeted postcard and email campaigns directed at specific industry segments. The Marketing module allows them to easily build campaigns designed for a specific region, and a specific industry. For example, healthcare organizations in Portland or hotels in Houston can be the targets of a campaign. The success of each campaign is followed in Sage CRM SalesLogix through reports and graphs allowing Swinerton to repeat successful campaigns and modify those that didn't deliver results.

Blueprint For Success

"We have tremendous confidence in Lexnet," says Witter. "They have introduced us to best practices in sales and marketing, allowing our business development teams to become better at what they do." Marks agrees, "Lexnet's knowledge and project management are flawless."

Sage CRM SalesLogix and Lexnet, building a productive and profitable future for Swinerton Builders.

Lexnet Consulting Group is a leading provider of objective CRM business analysis and implementation services. The company is headquartered in San Francisco California, with additional offices in Los Angeles and Atlanta. Lexnet was founded in 1994 by Steve Chipman in order to provide companies with an expert resource for the evaluation and implementation of customer relationship management solutions.

The Lexnet team has completed more than 200 successful CRM implementations for mid-sized companies and teams within large enterprises. Among the companies that have improved the efficiency of their sales and marketing process with help from Lexnet are Ask Jeeves, Barclays Global Investors, Photon Dynamics, Swinerton Builders and Tarantella. For more information about how Lexnet Consulting Group can help you untangle the complexities of customer relationship management, go to www.lexnetcg.com or email us at info@lexnetcg.com.



Lexnet Consulting Group
220 Halleck Street, Suite 130
San Francisco, CA 94129
(415) 561-3410
www.lexnetcg.com

