Using Microsoft Dynamics® CRM, Bernard Brothers have targeted building opportunities and proposals to zero-in their business practices.

**SOLUTION**

Jeff Bowen, Director of Technology and Information Services, knew they wanted a more current CRM-based system. “I knew that Microsoft Dynamics® CRM aligned with our business plan and model. That was the push to go to that solution. Once we identified the software, it basically came down to finding a partner/developer,” says Bowen. Bernards turned to a long-time, trusted vendor, CDW, for recommendations on a CRM developer. When CDW endorsed Ledgeview Partners, Bowen's decision was made.

With the guidance of Ledgeview Partners, Bernards implemented Microsoft Dynamics® CRM 2011 Online, with the intention of transitioning to on premises to integrate with SharePoint. In July, 2012, they started migrating live data and the business development team went live in October, 2012. They are now up to over 20 users and have completed two phases of implementation.

“When we rolled it out, we targeted just our business development team (core users) and we staggered the rollout to let core people use it first.” says Bowen. This team played a role in defining what criteria and fields they wanted in the system. This was important in the implementation of the system as they were going to be the heavy users.

For Bernards, and the construction industry as a whole, leads do not drive their business development. Therefore, they set up Microsoft Dynamics® CRM to track opportunities (building proposals). Every
opportunity is either lost, put on hold/deferred, or won (closed and becomes a project). They don’t use CRM to find new leads, but to track building opportunities and proposals.

Yet, implementation was not without its hurdles. “They were using the new CRM like they were using the old system,” Bowen shares. “They were not taking advantage of the benefits CRM gives you with all the data relationships, but as we continue to work with Ledgeview, it helps us realize the other capabilities within CRM that will make tracking opportunities and project data become more effective than what we were doing.”

**BENEFITS**

Because the data is now in one centralized database, the business development team can pull meaningful reports that show all of their opportunities and what stage those opportunities are in in the pipeline. CRM also allows them to see if another associate is already working with an opportunity, get updates on the history of the account, and look for ways to collaborate for a win.

The business development team in the Arizona office specifically uses Dynamics CRM to generate the sales and pipeline reports to see how many opportunities are being worked on, how many more opportunities they need to work on to get to goal, and how many contacts are needed per month to keep the pipeline at optimum levels.

**SHAREPOINT IN COMBINATION WITH CRM IS THE BUILDING BLOCK TO BREAK AWAY FROM THESE DATA SILOS AND START HAVING A CENTRAL DATABASE.**

— Jeff Bowen, Director of TIS

With business development as the driver of the information and data for Bernards, implementing CRM into the Project/Personnel Scheduling departments came naturally. Once an opportunity is won, it becomes a project. Once a project, the activity leaves business development and is part of operations. When scheduling personnel for projects, operations now has all of the data that the business development team entered and is better able to manage the projects from that point forward.

CRM tracks all active projects and the personnel assigned to those projects. “Because of the data relationships that have been built in CRM—we can be in the scheduling system or the project information side and view the shared information,” says Bowen.

Marketing is also reaping the benefits of this centralized database. With custom fields like type of construction, project value, features, market sector, and even in-depth project manager profiles, they can query their projects and project managers to quickly identify experience in certain markets, with specific project types, by geography, and team member which is extremely helpful in developing winning proposals.

**SUMMARY**

“These days, we’re not so much selling the company as much as we are selling our personnel,” says Bowen. “Potential clients want to know about the people who are going to work on their project and that the project manager has worked on jobs just like the one they are building and that the project team has experience building the type of project they are going to build for them. CRM allows us to get into that detail and find those individuals.”

“This full circle is where the power of the application comes in. As we expand on that and build more “tabs” in the system as we call them. It’s all using this core information inside CRM.”

Bernards continued partnership with Ledgeview ensures that they will continue to grow in knowledge of their Microsoft Dynamics® CRM solution and how they can use it more effectively to grow their business.

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**BERNARDS BROTHERS OVERVIEW**

Bernards Brothers is a privately owned construction firm founded in 1974 by brothers Doug, Greg, and Jeff Bernards. Headquartered in Los Angeles, they are a nationally ranked, multidisciplinary commercial builder with four additional regional offices throughout the southwest, employing over 280 qualified professionals. They deliver technical expertise and outstanding construction services to developers, corporations, educational institutions and public agencies. Bernards has earned the trust of their clients and honed their business to integrate the hallmarks of integrity, quality and value for a wide range of project types. They offer best-in-class general contracting and construction, program and project management.

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