THE WINNING TECH STACK

for Successful AEC Sales and Marketing

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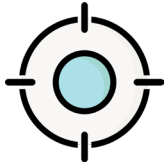# Table of Contents

Introduction

Deciding on the right marketing technology for your business can be overwhelming. That's why we developed this guide to help make your search for a new tech stack (or a new solution to add to your existing stack) a lot easier.

With the right tech stack in place, your organization will be able to streamline workflow, better leverage available marketing assets, effectively target and nurture your most promising leads, and better showcase your firm's expertise.

Key Benefits of a Well-Integrated AEC Marketing and Sales Tech Stack

Improve focus on a project-related expertise

Your business is built around projects, and the technology you use should be, too. The growing demand for niche expertise means your marketing and sales teams must be able to showcase your firm's specific project experience efficiently and effectively. By leveraging a tech stack that organizes, centralizes, and connects project details with visual assets, you can better tell your firm's story and speak to its unique capabilities.

Improve relevance and effectiveness

Today's marketing and sales technologies tell you more about the performance of your content in relation to how it's being consumed by your clients and prospects. By leveraging this performance and behavioral data, sales and marketing can better personalize project-based content to not just a vertical, but also the individual lead and/or opportunity. By aligning content to interests, you guide the firm to achieving more effective lead nurturing and more productive sales conversations, which translates into more closed/won opportunities.

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Prove your ROI

The right tech stack will enable you to get a complete end-to-end picture of your marketing and business development efforts. With the proper integrations, you'll be able to connect won and lost business back to where and how it originated and measure the overall value of your various investments.

Leverage your most valuable marketing assets

Digital assets are one of the most powerful tools a firm has for showcasing and demonstrating its capabilities. These assets help present the firm's expertise in the best possible light across a wide variety of channels. The right tech stack increases efficiency by organizing them around projects, connecting them to your other marketing and sales tools, while offering controlled access to more people in the firm. The benefit is faster and more effective development of RFPs, presentations, and documents; improved knowledge sharing; and more on-target inbound and outbound marketing.

The Tech Stack Your Business Needs

We've narrowed down the plethora of technology solutions available to AEC firms to a handful that we believe deliver the advantages your business truly needs to compete.

- ▸ Digital Asset Management (DAM)
- ▸ Enterprise Resource Planning (ERP)
- ▸ Customer Relationship Management (CRM)
- ▸ Knowledge Management
- ▸ Content Management System (CMS)
- ▸ Marketing Automation
- ▸ Analytics

Digital Asset Management (DAM)

A DAM solution is a central repository for managing, organizing, retrieving and using your firm's most valuable marketing and sales resources, namely project images, videos, floor plans, elevation drawings, logos and graphics.

Why DAM?

It's easy to underestimate how much time is spent managing and working with digital content. Without the right tools, finding, resizing and using images takes up a tremendous amount of time. DAM solves time and cost challenges, creating process efficiencies and boosting productivity.

In fact, our research shows that nearly half of AEC firms currently leverage a DAM solution to manage their ever-growing collection of digital assets, and it's paying off for them big time. Forty-six percent said they saw improved marketing productivity. They were spending less time on production tasks so they could spend more time on higher value, critical tasks that impact overall business.

And 47% said they experienced improved operational efficiencies. They find it easier and faster to access images, appreciate that quality images are available firm-wide, and state that deliverables can be created more efficiently, including RFPs.

To deliver the greatest benefit to AEC firms, a DAM solution should be both cloud-based and project-focused. A cloud-based DAM allows users to access the images and videos stored in the system from anywhere, making it much more versatile. And when it is project-focused, DAM is built to store and organize your digital assets around the firm's projects. This dramatically simplifies the process of uploading, editing, organizing, managing, and retrieving the firm's project assets.

How DAM Functions in Your Tech Stack

DAM with ERP and CRM

▶ Streamline workflows and create efficiencies by leveraging project data in ERP/CRM to link project images to project information.

DAM to CMS and Knowledge Management

▶ Push content into other systems for instant access to the images and project info, eliminating the need to constantly move, download, upload, and save new versions of files.

DAM to Design Applications

▶ Quickly create project-focused sales and marketing materials by dragging and dropping images into InDesign templates and PowerPoint presentations where they are automatically resized.

Enterprise Resource Planning (ERP)

An enterprise resource planning system, or ERP, is a system for managing and integrating important parts of the business.

It streamlines processes while promoting better communication between departments and functions. In the AEC world, ERPs deliver real-time information to project managers to help them stay on top of their projects; identify problems early; track financial, project, and resource planning data; and ensure profitability of the project.

Why ERP?

ERP systems can help AEC firms deliver projects more successfully and win more business as a result. In addition, ERP can and should serve as a single source for all project information across your firm. It keeps the data centralized, up to date, and available to everyone, ensuring that all departments and team members have access to the same reliable information and can more effectively collaborate with each other.

As with DAM, choosing an ERP system that's project-focused makes a lot of sense for AEC firms. Project-based ERP solutions are designed to complement the complete project lifecycle, and they give you tools to reduce project risk, tackle project management challenges, stay on schedule, and stay focused on the profitability of each project.

How ERP Functions in Your Tech Stack

As the single source of all project information, your ERP solution supplies all the other systems in your tech stack with the same up-to-date information, significantly increasing the value of that project data. Connections between components eliminate double data entry, saving a lot of time and effort while ensuring everyone in your organization is on the same page with consistent project data and details.

ERP to DAM
▸ Bring in project data, link project images to project information and maintain a single source-of-truth.

ERP to CRM and Knowledge Management
▸ Push data out to populate other systems, increasing the value you get from your data and eliminate double data entry.

Customer Relationship Management

A customer relationship management system, or CRM, is the singular tool to understanding your clients, leads and opportunities.

It provides a 360-degree view of interactions you've had with your contacts—including conversations, emails and online activity and behaviors—in addition to letting the firm know where it stands within the business development lifecycle. All this data gives insight into what clients need and their most pressing concerns, allowing you to have more success in marketing, business development and client retention.

Why CRM?

CRM can help you better connect with the people you serve and understand how to build and nurture your working relationship. A CRM solution delivers real and powerful bottom-line advantages like increasing revenue and customer retention.

How CRM Functions in Your Tech Stack

To realize the advantages of CRM—namely, getting and keeping more business—companies need to view the system as much more than a high-end rolodex. When CRM is fully integrated into the tech stack, it both pulls and pushes information from your other systems to support targeted sales and marketing efforts.

CRM to ERP
▸ Client information enhances all business processes from sales to billing; projects are paired with existing and legacy account contacts for greater visibility into the business development pipeline and improved forecasting.
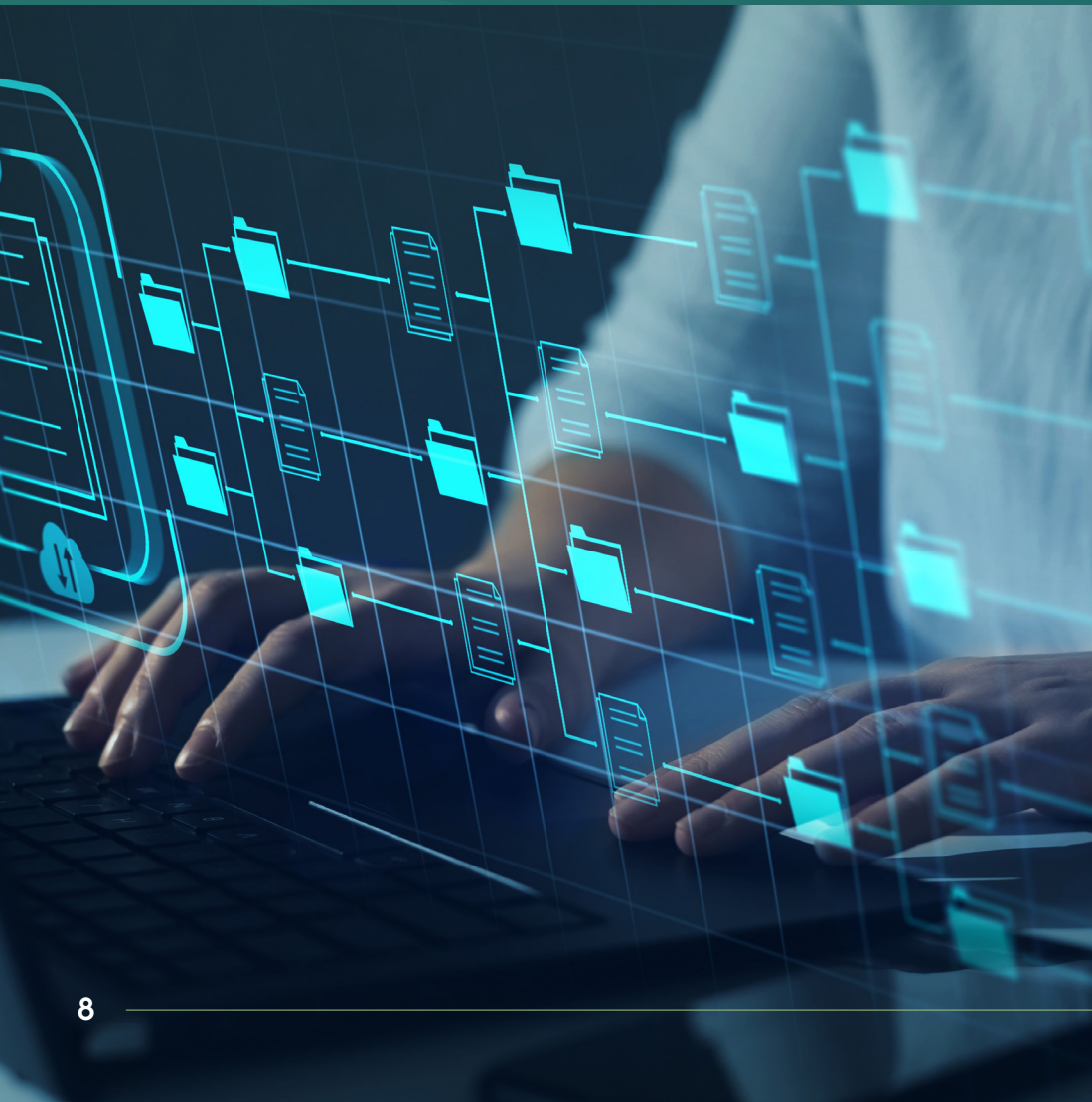
CRM to Marketing Automation
▸ Client firmographic and demographic information, including historical data about business development with a lead or client, helps inform automated and targeted marketing campaigns.

CRM to DAM
▸ Project and client details are connected to images; CRM project descriptions and data can be mapped to your DAM solution, and pulled into DAM generated templates to improve business development efficiency.

Knowledge Management

We've looked at how the tech stack can support external marketing and sales efforts and improve communications and relationships with customers. But many of the components also play a role in improving internal communications, especially related to the transfer of knowledge within a firm.

Why Knowledge Management?

Knowledge management platforms enable experts within the firm to transfer knowledge to others in a quick and efficient way, ensuring that internal know-how doesn't leave a firm when a person leaves or retires.

How Knowledge Management Functions in Your Tech Stack

If a knowledge management solution is integrated with your ERP and DAM solutions, the value of all three systems exponentially increases.

Knowledge Management to ERP

▸ Quickly pull relevant project data from your ERP solution and make it available to all employees via y our intranet.

Knowledge Management to DAM

▸ Pull the visual assets around a project to provide full context on a topic to anyone within the organization.

Content Management System (CMS)

Most firms already use a content management system, or CMS, to simplify the process of adding and editing website pages without the need for a developer.

The beauty of the CMS is that non-technical users can easily publish and manage content without the fear of changing website design. By giving users different levels of access and leveraging built-in approval systems, you can ensure that content is final and ready to go before it goes live to your site. What's more, CMS is key to SEO best practices. It lets you manage page titles, page URLs, and page headlines—three critical elements that Google regularly assesses to understand your content.

Why CMS?

CMS is critical to meeting the growing demand for dynamic and fresh content on both websites and social media channels. Beyond enabling content creation strategy, firms that fully leverage the capabilities of CMS benefit from the insight it can provide about site traffic, activity and the people who are consuming your content. CMS can, and should, deliver a wealth of information about what content is performing best with users, and thus most valuable to your business. And it can help you shape the buying process through strategically placed calls-to-action.

How CMS Functions in Your Tech Stack

Some firms miss out on the opportunity to fully integrate CMS with the rest of their technology solutions. Thus, they are missing out on key advantages of a well-integrated tech stack, including having a better understanding of who your clients and prospects are and what they like. When CMS is fully integrated, it works like this:

CMS to ERP
▸ Pulls project data from ERP for creating and publishing new content and updating case studies or team bios on the fly, without the need for a developer's help.

CMS to DAM
▸ Images are resized in the DAM solution to fit your digital needs and are published through your CMS onto the web.

CMS to Marketing Automation and CRM
▸ Passes through the information entered within the forms on your site or the specific content consumed by a known visitor to systems marketers and business development teams use daily.

Marketing Automation

More than any other component of the tech stack, marketing automation technology has evolved the most over the past couple of years.

The greatest value of the technology is twofold; it can help pinpoint high potential leads for your firm from within your existing contact databases, and it can automate targeted marketing programs to those leads based on what interests them most. It's also a powerful tool for handling landing pages and their forms.

Why Marketing Automation?

Your marketing and business development teams only have so much time, and marketing automation helps ensure they are spending that time on the leads and prospects who are most likely to result in future business for your firm. It begins with lead scoring your contacts based on demographics and online behaviors. You can then use those insights to execute automated email programs designed to nurture high-potential prospects through the buying process.

Plus, your business development and marketing teams can now create more relevant content directly on target with the interests of your potential clients. And when your business development team looks to connect personally with the lead, they have information about the content those leads engaged with right at their fingertips.

How Marketing Automation Functions within Your Tech Stack

Marketing automation solutions are specifically built to integrate with CRM systems and website analytics platforms.

Marketing Automation to CRM

▶ Campaign performance data, behavioral data and lead scores prioritize business development activity and provide insights about clients, leading to more productive, relevant sales conversations.

Marketing Automation to Web Analytics Platform

▶ Micro-level behavioral data about individual leads is cross referenced with macro-level visitor data within your analytics platform to better understand content consumption and the overall effectiveness of your digital marketing efforts.

Analytics

Like CMS, most companies already use a macro analytics platform to help inform content marketing decisions and business development efforts.

Web analytics tools measure site traffic, page views, time spent on a page, and actions taken or clicks for your website as well as for your competitors' sites. The tools analyze and report the data so you can get a better understanding of how your site stacks up. This information is crucial to constantly improving the quality and effectiveness of your content and online experience.

Why Analytics?

Your website is essential to attracting potential clients, engaging them with valuable content, and converting them into leads for your practice. Website analytics help you determine where site visitors are coming from (i.e. search engines, social media, marketing campaigns), what content they are engaging with on your site and where they are leaving the site. At the same time, you'll learn what services and information most interest your potential clients, and you'll gain some useful demographic information about your site visitors. All of this can help you market more effectively and better meet the needs of your targets.

How Analytics Functions in Your Tech Stack

Web analytics is another form of useful data that can inform, improve and enhance the value of all the other components of your tech stack.

Analytics to Marketing Automation
▶ Macro analytics data around the collective visitors to your site is cross referenced with marketing automation data to tell you how well your content is attracting, retaining, and converting site visitors.

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Integration: How it All Comes Together

The recommended tech stack components integrate with each other to share data and assets and enable a streamlined and efficient workflow.

In fact, many of our clients are using some or all of these components today with great success. While there are many solutions within each category that can serve your business and marketing needs and may be worth investigating, it is important to keep integration in mind. If your systems don't work well together, they may end up causing more headaches then they solve. But when they do connect, they can deliver outstanding results.

Putting Your Tech Stack in Place

Whether you have several components of your marketing and sales tech stack already in place or you are just starting to invest in the technology, now is the time to make sure you are taking a project centric approach to selecting your technology tools. And be sure to carefully consider integration. When you assemble a system that works together seamlessly, you empower your marketing and sales teams to showcase your firm's projects and win more business.

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What to Do Next?

If you don't have a DAM solution in place, find one that best fits your firm.

If you already have DAM, now that you have a list of where your integrations will add the most impact and time savings, contact your customer support team to ensure you maximize your DAM solution. If you're with OpenAsset, **check out our integrations** or email us at **support@openasset.com**.

Schedule a Demo ›

About OpenAsset

OpenAsset is the number one project-based Digital Asset Management (DAM) solution for Architecture, Engineering, Construction, and Real Estate firms. It is delivered and supported by Axomic, which has a global presence with staff based in London and New York.

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