

# Driven by Excellence – And a More Productive Project Pipeline

Venerable Chicago construction firm J.C. Anderson, Inc. needed a better way to manage its new business pipeline of tenant interiors and building services projects. New Dynamic created a Dynamics 365 revenue management tool to help J.C. Anderson, Inc. organize and prioritize the volume and velocity of new project opportunities.

**Bill Burfeind has** 20 years of experience in sales, estimating, pre-construction consulting and project management for commercial interiors, education and mixed-use development projects.

As Vice President at J.C. Anderson, Inc., Burfeind oversees sales and business development including account management and project delivery.

J.C. Anderson manages and tracks over 400 opportunities each year that eventually become more than 100 active projects worth over \$100 million in new revenue.

When Burfeind arrived at J.C. Anderson, Inc. (JCA) he found a pipeline management process that was successful, but needed more structure, workflow and visibility. There was no clear path from prospecting to the project award.

The management team decided to review and evaluate pipeline management.

“The pipeline management platform designed by New Dynamic has helped us streamline new business visibility for the management team and key leaders. Our internal meetings are less stressful and more productive because we can see what’s coming and be more proactive when it comes to winning new business opportunities.”



– Bill Burfeind, Vice President

J.C. ANDERSON, INC.



“We were reacting or readjusting our forecast in our new business meetings without any real process and focus to guide us, and it felt like we were behind on our presale activities like lead generation, discovery, updated qualifications, and sales actions,” says Burfeind.

New Dynamic was brought in to chart the process and apply the best technology for the solution.

## In Quest of a Better Forecast

J.C. Anderson, Inc. executives and department leaders meet every two weeks to review the pipeline made up of the lead log,



qualified opportunities and pending projects. The forecast report is reviewed, and people, time and resources are allocated accordingly.

“Our livelihoods and our growth depend on our ability to forecast projects accurately and focus on high-probability opportunities,” says Michael Yazbec, president of J.C. Anderson, Inc. “If we can’t do that efficiently it’s hard to win on a consistent basis. We really needed to strengthen this area of our business.”

To overhaul the process, a new pipeline management template from AEC360 was adopted to give visibility to key milestones. It was built on top of the Microsoft Dynamics CRM Online platform.

“New Dynamic helped us document every step and then customize AEC360 and Dynamics 365 for us,” says Burfeind. “They also knew from working with other general and specialty contractors which steps were critical and how to apply the technology appropriately.”

New Dynamic helped create a pipeline framework designed for speed and visibility, making it easy to track leads at every stage, from opportunity to secured.

## Pains & Gains

### Pains

- Pipeline management for sales prospects was non-existent.
- Reports were filled with stale leads, unqualified projects, and inconsistent close dates.
- Opportunity forecasting was inaccurate and took too much time to identify, review and update internally.

### Gains

- J.C. Anderson, Inc.’s new Dynamics 365 project pipeline has automated pipeline qualification, tracking and reporting.
- Executives and department leaders make decisions with more confidence and allocate resources more efficiently.
- Future revenue projections are more organized and accurate, brings focus to high probability opportunities.

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In its first year of use, the newly-designed Lead Log and JCA Forecast Report has helped the team increase its hit ratio.

The productivity of JCA’s team has increased dramatically. The reporting is automated for department meetings and executive team meetings. Managers can open, advance, and close opportunities and everyone gets the information at the same time.

JCA’s next goal is to get the operations team on the construction side the same access to CRM data for tracking business development progress. New business is ultimately everyone’s job at J.C. Anderson, Inc. so everyone needs visibility to presales activities and success metrics.

“New projects are the lifeblood of any construction company, and thanks to New Dynamic we now have organization and visibility to a pipeline and forecast we can trust and depend on to predict this year, as well as next year,” says Burfeind. “We have a better view of our path to revenue goals, and most importantly, for those of us responsible for business development, a more reliable guide to fulfilling our plan.” ●