

# CABIS ProjectCRM

## Business Intelligence and Opportunity Management



**“A comprehensive business development system to improve and optimise work winning processes”**

### Overview

Winning organisations in the construction industry are customer focused and require effective sales and marketing systems to manage their activities across national and international regions, and teams of business development people. It is critical that supporting business systems can successfully manage business intelligence and complex activities such as pre-qualification, tendering and strategic opportunity management. CABIS ProjectCRM is an effective system that provides a set of integrated modular tools, namely Communication, Proposal and Strategy to support the identification, tracking and winning of profitable project opportunities.

All CABIS systems are based on the powerful and adaptable CABIS application framework known as CABIS Business. CABIS Business is developed using the very latest Microsoft .NET and SQL Server technologies. CABIS Business can be integrated with Enterprise Resource Planning systems. It can be operated on Oracle as well as Microsoft SQL Server.

### Communication Tool

Communication provides an effective method for managing all aspects of communication with customers and partners during lead generation and project opportunity management. Telephone conversations, conference calls, meetings, mailings, etc. can all be coordinated and in many cases executed directly from the system. All relevant communications can be captured and immediately added to the wealth of business intelligence that users can capitalise on.

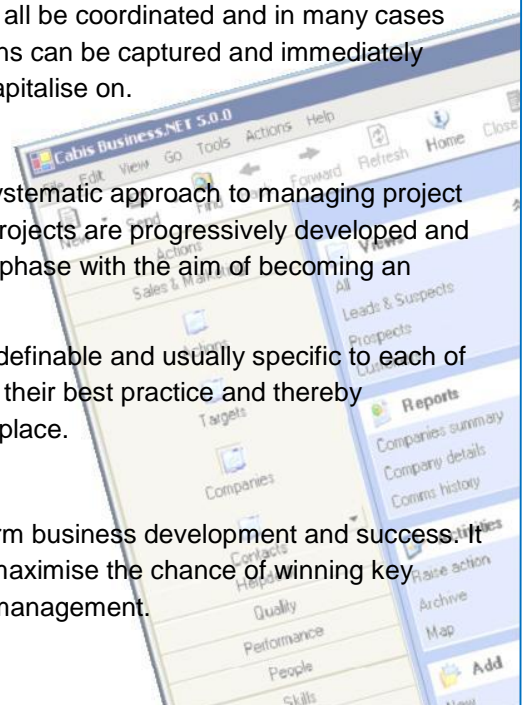
### Proposal Tool (Prospects, Tenders, Awards)

Proposal builds on the Communication tool and provides a systematic approach to managing project opportunities involving multiple companies in various roles. Projects are progressively developed and ideally transition from the prospect phase through the tender phase with the aim of becoming an award.

Project transition is governed by project status which is user definable and usually specific to each of our clients. In this way our clients can fine tune the system to their best practice and thereby differentiate themselves in what is a very competitive market place.

### Strategy Tool

Strategy is at the heart of the system and is critical to long term business development and success. It enables users to develop and manage strategic activities to maximise the chance of winning key accounts through effective intelligence gathering and action management.



## Features

- Comprehensive project opportunity tracking, analysis and reporting (pipeline)
- Importing lead data from the likes of Glenigan and ABI
- Action planning and management with email reminders
- Comprehensive communication tracking, analysis and reporting
- Event management
- Document management
- Email notification
- Prospective, tendered, awarded, and actual dates, costs and margins (integration point with ERP)
- Contract type, pricing scheme, insurance, and other contractual details
- Competitive tender tracking with variance to winner analysis
- Strategic prospect qualification
- Opportunity SWOT analysis and strategic opportunity management
- User defined lists (terminology and process)
- Analysis and reporting using Microsoft Excel and Crystal Reports
- Exporting to Microsoft Excel for data mining which can also be performed using SQL Server Business Intelligence tools

## Benefits

- Shared company, contact and communication data ensures that authorised users can be fully informed and prepared when working on business development activities
- Proposals can be effectively managed to maximise the conversion of project opportunities into awards
- Strategic activities can be developed and managed in order to increase market share, break into new markets or win key accounts
- Real-time monitoring and decision support for managers and senior managers
- Real-time business intelligence through analysis and reporting
- Scalability and extendibility
- Stronger CRM capability when linked to CABIS Quality

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