

Developing Your Data Collection & Maintenance Program – *No CRM Needed*

Biggest Proposal
Frustrations.....

RELIABLE
EASILY-AVAILABLE
INFORMATION

Types of Data



Data Maintenance System

WHAT IT IS....

WHAT IT IS NOT....

**“Management works in the system;
Leadership works on the system.”**

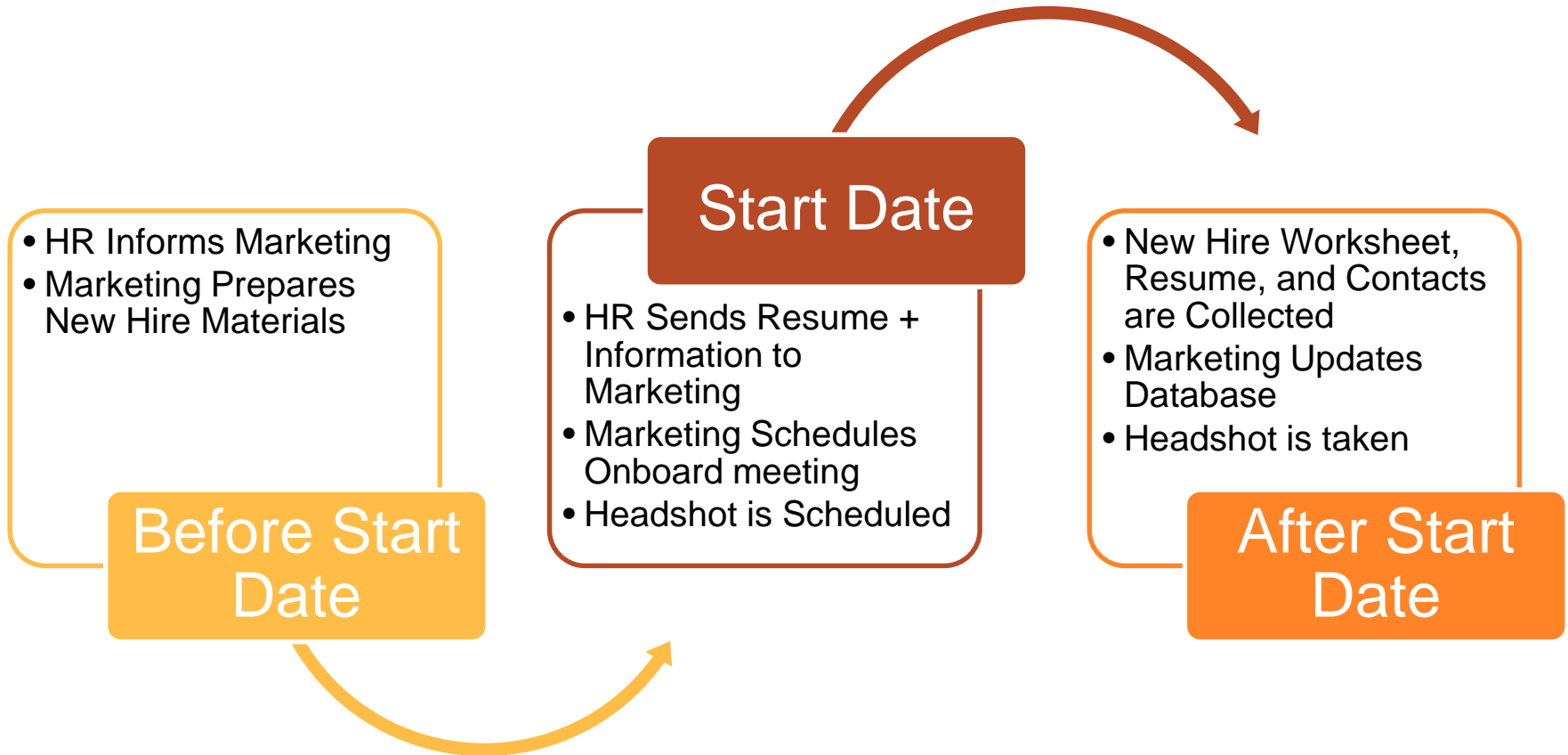
STEPHEN COVEY

Best Practices People


New Hires

- Ideal time
- HR Department is your friend
- Information types
 - Bio
 - Previous projects (with years completed)
 - Licenses (with expiration dates)
 - Awards/Special Achievements
 - Special skills/expertise
 - Software
 - Languages
 - Contacts

In Action: BRPH New Hires



In Action: BRPH New Hires



Architects | Engineers | Constructors
 935 Lake Baldwin Lane
 Suite 200
 Orlando, FL 32814
 407.896.9301
 407.896.9304 f
 www.brph.com

DATE

Dear **FIRST NAME**:

Overview
 Welcome to BRPH. As a new employee, we need to obtain the following items from you:

- Resume (with any additional pertinent information)
- Photograph
- Mailing list

Resume
 As part of the new hire process, marketing creates your resume in our corporate database, Deltex Vision. The information is used in bids, proposals and other documents. We need to receive your resume, along with any supplemental information by **DATE (ONE WEEK FROM HIRE)** in order to get this information into the database as soon as possible. You can email or give your resume and information directly to **INSERT COORDINATOR NAME AND CONTACT INFORMATION HERE**.

For your resume, please make sure to include the following:


- **Years of Experience** – this usually starts with the year you graduated from college
- **Education** – list all degrees and certifications
- **Professional Registration** – please provide a copy of your license
- **Organizations** – list any professional organizations in which you are currently a member
- **Publications** – list any papers you have published or presentations you have given
- **Computer Fluency** – list the computer programs in which you are fluent
- **Foreign Language** – list the languages, other than English, in which you are fluent
- **Awards** – list any awards you have received
- **Professional Experience** – this is a general paragraph about your past experience
- **Project Experience** – provide project name, client name, location, brief summary of project and your role in the project, construction value, and dates complete (design and construction) for each project

Photograph
 Please make arrangements with Todd Reed, Graphics Manager, (treed@brph.com or x3057) to schedule an appointment to take your company photograph. Please make arrangements to get your photograph taken by DATE (TWO WEEKS FROM HIRE).

For your photography session, business attire is required (suit jacket, shirt, and tie for men; business wear or other suitable dress for women).

Mailing List
 Our database will hold a mailing list for you. This list should have any contacts you have that you would want to receive mailings from BRPH. For each contact we need the following information:

• Name	• Fax
• Title	• Email
• Company Name	• Sector Code for Clients
• Address	• Types of Mailings to be received
• Phone	



Team Member Experience Worksheet

GENERAL INFORMATION

Team Member: _____

Education: _____

Work Phone: _____ BRPH Call Phone: _____

Software: _____ Skill Level: Expert Competent Knowledgeable

Software: _____ Skill Level: Expert Competent Knowledgeable

Software: _____ Skill Level: Expert Competent Knowledgeable

Language: _____ Skill Level: Conversational Fluent

Language: _____ Skill Level: Conversational Fluent

EXPERIENCE DETAILS

This information section applies keywords to your professional experience, allowing marketing to conduct easier and more accurate searches. Please select the key words for each area of expertise, if they are applicable to your experience.

Planning: Master Planning Environmental Impact Studies Zoning/Land Use Studies

Project Management: Proposal Preparation Contracts/Language Managing Outside Consultants Client Management/Business Development
 Financial Management/Earned Value Scheduling Risk Management

Civil Engineering: Pump Station Design Hydrology Roadway Design (Plan/Profile) Irrigation, Drainage Coastal Engineering Parking Lots
 Drainage/Sewerage Rail/Transit/Guideways Sewage Treatment Water Supply, Treatment and Distribution Technical Writing

Architecture: Programming Master Planning Anti-Terrorism/Force Protection Planning/Character Space Planning Design Development
 Visualization Construction Admin Construction Documents Business Development Technical Writing BIM Design Thinking
 Project Execution Plan (PXP) Quality Control

Structural Engineering: Cast-in-place Concrete Steel Drilled Shaft Foundations Pile Foundations Cranes Long Span Trusses High Wind
 Seismic Design & Studies (Category D, E, F) Launch Infrastructure Technical Writing Equipment Foundations Timber
 Post-Tension Concrete CMU Multi-Story Buildings Underground Structures

Mechanical Engineering: Cold Storage, Refrigeration Systems Hydraulics & Pneumatics Product, Machine Equipment Design Process Piping
 Chiller Plants Technical Writing Boiler Systems

Industrial Engineering: Plant Design Tank Storage Automation, Controls & Instrumentation Technical Writing

Electrical Engineering: Communications Systems Lighting/Interior Theater Lighting Lighting-Exterior Street Lighting Athletic Field Lighting
 Power Generation, Transmission, Distribution Design Technical Writing

Interiors: Planning/Character Programming Space Planning Design Development Move Management Interior Renderings
 Furniture, Fixtures & Equipment Comprehensive/Structural Interior Design Construction Admin Construction Documents
 Business Development Branding Design Thinking/Visiting AV Integration

PROJECT TYPE EXPERIENCE

This information section applies keywords to projects. Please select the key words for each type of project you have experience.

Aviation: Airside Landside MRO Hanger FBO Terminals Runways Aprons/Taxiways Master Planning Airport Lighting
 NAVIGIS Aircraft Fueling Airfield Paving Concessions Soaring Embroider Nonstop/Groundair Gulfstream

Manufacturing: Clean Rooms Composite Facilities Autovehicles Warehouses Chemical Plants Wind Tunnels Paint Facilities
 Tooling Automation

General Facilities: Refrigeration Facilities Food Storage Facilities Corporate Campus Healthcare Retail Medical Labs
 Auditoriums & Theaters Churches Field Houses, Gyms, Stadiums Hotels/Motels Research Facilities Data Centers

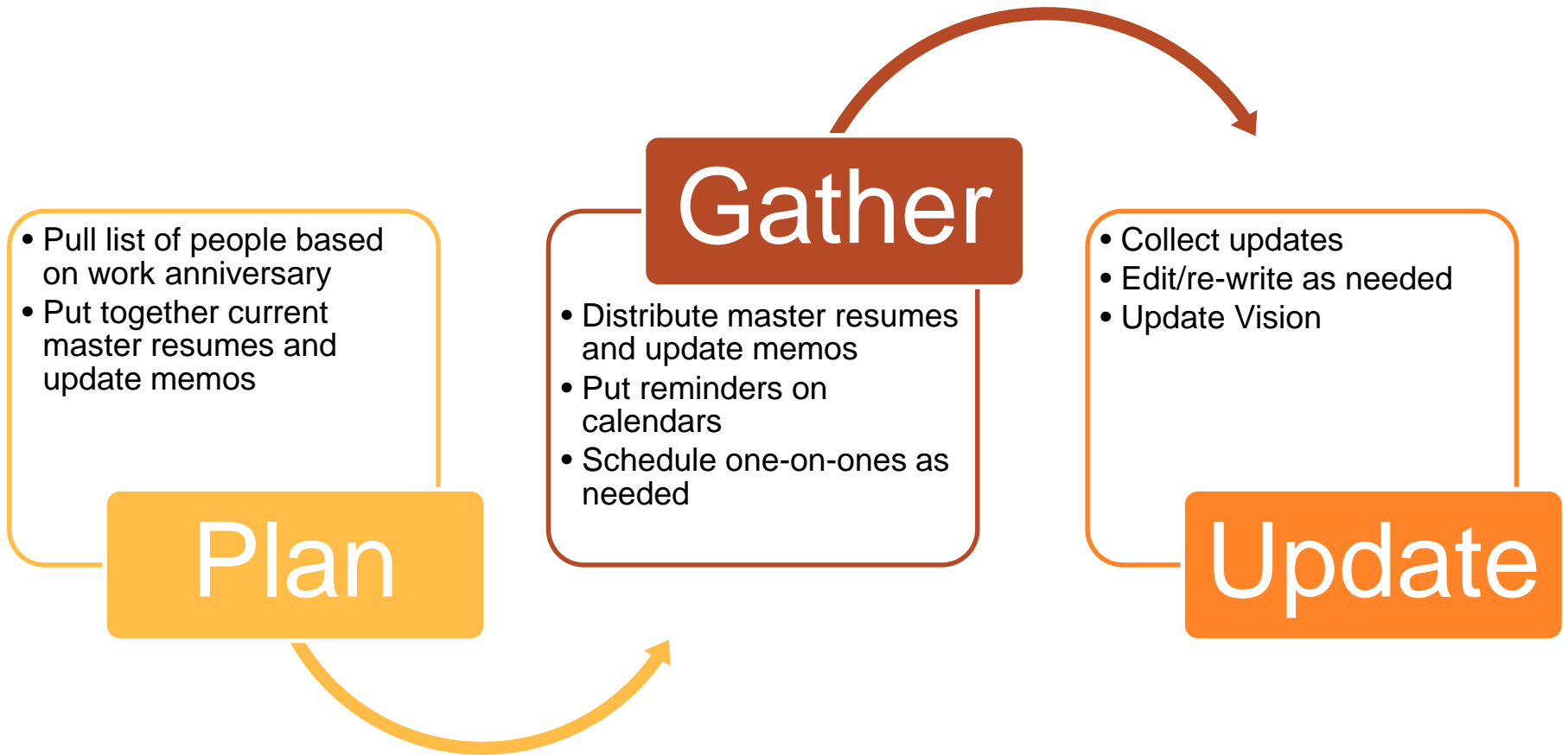
Energy Projects: Central Plant Chillers Distribution Systems Energy Master Plan Energy Audits Cryogenic Facilities Biofuel Refineries
 Wind Plants Solar Plants

1/31/2018 1

Resume Updates

- Determine **frequency** – annual, quarterly, etc.
- Determine **who's** to update
 - Everyone at once – make it a big event/initiative
 - Work Anniversary updates
- **Hand them** a current resume
- **Hand them** instructions or a checklist
- Give a **deadline** (send them a calendar invite reminder)
- Schedule a one-on-one meeting (even record it)
- **Gather** information
- **Update** database or master resume

In Action: BRPH Annual Updates



In Action: Annual Update Instructions

memo

[Company name]

To: [Recipient names]
From: your name
CC: [Recipient names]
Date: [Pick the date]
Subject: Resume Update

ANNUAL UPDATE BLURB:

Another great year has passed at [FIRM NAME]. As part of this great year, we would like you to review your professional resume on file in the marketing database. It is imperative that it reflects all of your great accomplishments for use in proposals and qualifications to obtain new work.

Attached is your current resume from our current marketing files. Please take few moments to look at the following areas on your resume. Mark any edits or changes and return it to marketing no later than **Wednesday, April 25th 2018**.

WORK ANNIVERSARY BLURB:

Happy Work Anniversary! As part of celebrating another year with [FIRM NAME], we would like you to review your professional resume on file in the marketing database. It is imperative that it reflects all of your great accomplishments for use in proposals and qualifications to obtain new work.

Attached is your current resume from our current marketing files. Please take few moments to look at the following areas on your resume. Mark any edits or changes and return it to marketing no later than **Wednesday, April 25th 2018**.

Name and title – Is your name spelled correctly? Is your professional registration designation correct (i.e.: PE, EI, ASLA, AIA, etc.)? Is your job title correct?

Employee Bio – This can be a general paragraph about your past experience or a specific description of one of your specialties (manufacturing design, mechanical expertise, experience with FDOT, etc.). Refer what is currently showing for accuracy. Let marketing know if a specific one needs to be developed. *Please note I've attached a document to help with information for your bio.

Years of Experience – This usually starts with the year you graduated from college. Please tell us your years of total experience and years with [FIRM NAME].

Education – If you are missing any degrees, please provide the marketing department a copy of your diploma.

Professional Registration – If any of your registrations are missing, please provide a copy of your license.

Organizations – List any professional organizations in which you are currently a member. If you are no longer a member of one listed on your resume, please mark through it.

Publications & Presentations – List any papers you have published or presentations you have given at conferences. Include publication/organization, title and description.

Computer Fluency – List the computer programs in which you are fluent.

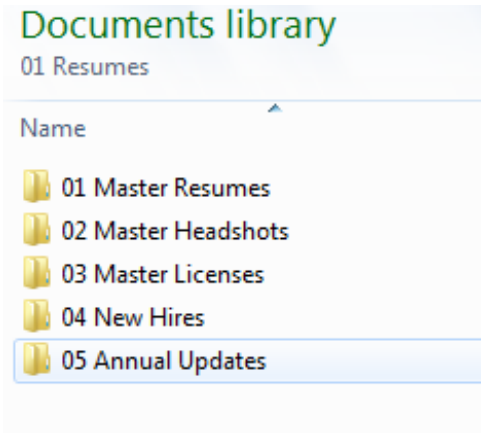
Foreign Language – List the languages, other than English, in which you are fluent.

Awards – List any awards you have received and date received (DD/MM/YYYY).

Firm Projects Currently Showing on Resume – Please take a few moments and write what your role was on each project listed (example: Mechanical Designer, Architectural Project Lead). Also please add a sentence or two about your specific job duties on the project (example: Mr. Traylor was responsible for coordinating with team members to determine LEED credits and preparing LEED documentation to register and certify the project with USGBC).

No Database, No Problem

- Use Same Steps
- Use Windows Explorer to Store:
 - New Hires
 - Annual Updates
 - Master Resume File, lock for editing
 - Master Headshot Folder
 - Master License Folder



BONUS: Automation

With CRM

- Use workflows to identify and alert resume is due to be updated (based on start date)
- Send current resume with instructions in message to both employee and marketing staff

Without CRM

- Annual resume updates done as part of performance reviews
- Resume updates reviewed by supervisors

Resumes
Maintenance

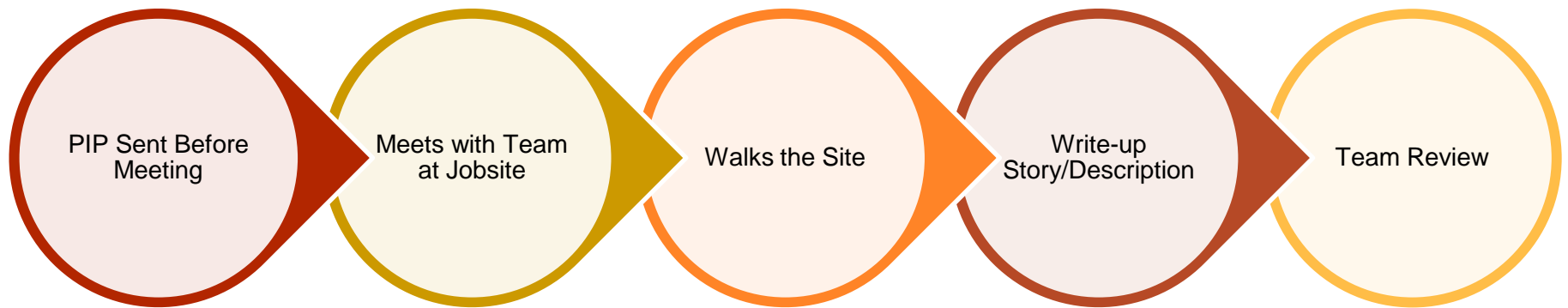
OTHER BEST
PRACTICES?

Best Practices Projects

Methods

- Annual Updates
- Project Milestones
- Pursuit Driven
- Award Submittals
- Initiative Driven Updates
 - Website updates
 - Rebrand
 - Merger-Acquisition
 - CEO wants it!

In Action: Hensel Phelps Site Visit Program



Project Information Worksheet

PROJECT INFORMATION WORKSHEET

Distributed To: _____
 Due By: _____ Return To: _____

BASIC PROJECT INFORMATION

This is the basic information needed for each project and is used as the starting place for choosing projects for resumes, proposals, SOQs, presentations, the firm website, etc. If the project is not of marketing importance, please fill in this basic information and check the corresponding box at the end of this section.

Project Name: _____

Project Number: _____ Confidential (verify): _____

Project Address: _____ City, State, Zip: _____

Project Manager: _____

Firm Role: _____ Project Size: _____

Service Dates: _____ to _____ Construction Dates: _____ to _____

Service Fees: _____ Est. Construction Cost: _____

Marketing Importance: Very Important Somewhat Important Not at this time

Professional Photography Needed: Yes No

Project Milestones (for follow-up): _____

CLIENT/OWNER/REFERENCE INFORMATION

The client is the entity that pays our invoices and is not always the entity that ultimately owns the project (for example, when we are a subconsultant). The reference is a person who is associated with the project who will serve as our references for the work we perform.

Client Company: _____

Client Contact: _____ Title: _____

Client Address: _____ City, State, Zip: _____

Client Phone: _____ Client Email: _____

Owner Company: _____

Owner Contact: _____ Title: _____

Owner Address: _____ City, State, Zip: _____

Owner Phone: _____ Owner Email: _____

Reference Company:

Reference Contact: _____ Title: _____

Reference Address: _____ City, State, Zip: _____

Reference Phone: _____ Reference Email: _____

BONUS: Automation

With CRM

- Use alerts with built-in questions at various project milestones
 - Open
 - XX% of Billings
 - Closeout
- Don't allow project closeout with missing data (or empty fields)

Without CRM

- Project Set-Up Forms
- Master Project Data Spreadsheet
- Project Schedules + Reminders in Outlook

Project Information
Maintenance

OTHER BEST
PRACTICES?

Start-Up Guide

- Resumes
 - New Hire Memo
 - Employee Experience Worksheet
 - Resume Update Memo
 - Questions to Help Write a Bio
- Projects
 - Project Information Worksheet

Thanks for Attending!

For more information contact:

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