CIS construction information services

MOBILE FRIENDLY

Tracking Companies in CIS CRM

2.1 TRACKING AND ASSIGNING PROJECTS

Begin tracking projects using CIS CRM by searching for projects you may be interested in or use one of your predefined saved searches. From the results list you will see that you have the option to track any of the projects.

• To track a project and assign it to yourself simply click the Track Project button

• If you have administrative privileges you can track and assign projects to other members of your team

• If a project is already tracked by one of your colleagues you will clearly see this from the list

• Tracking projects from the Project listing will automatically assign a recall date for the current day's date.

Projects

📄 5 results

Refurbishment of Health Centre   [Track Project ▼]

| ADDRESS | STAGE | DATE UPDATED | VALUE |
| Co. Dublin - Summerhill Health Centre, Summ... | Contract Awarded | 18/03/2015 | |

€245k - Nursing Home Refurbishment   [Track Project ▼]

| ADDRESS | STAGE | DATE UPDATED | VALUE |
| Co. Wicklow - Roseville Nursing Home, Meath ... | Contract Awarded | 18/03/2015 | €245,575 |

€5m - Medical Centre   [Track Project ▼]

| ADDRESS | STAGE | DATE UPDATED | VALUE |
| Co. Laois - Midlands Regional Hospital, Bl... | Contract Awarded | 13/03/2015 | €5,000,000 |

Tipperary Town Primary Care Centre   [Tracked: Clare Legge]

| ADDRESS | STAGE | DATE UPDATED | VALUE |
| Co. Tipperary - Rosanna Road, Tipperary Town | Contract Awarded | 13/03/2015 | €5,065,200 |

€3.4m Medical, Education and Training Centre   [Track Project ▼]

| ADDRESS | STAGE | DATE UPDATED | VALUE |
| Co. Donegal - Letterkenny General Hospital, ... | Contract Awarded | 11/03/2015 | €3,400,000 |

[Tender] [Closed]

Page 1 of 1   Records per page: [10 ▼]

The Project Listing above may not have enough information for you to decide if you want to track a particular project or not. In such cases you will have to clikc on the project title to look at the project details to learn more.

As with the project listing the facility to track the project is available. Once you click the **Track Project** button the CRM information becomes available for you to record your own specific project details.

CRM functionality gives you the tools to track and manage all of your CIS project leads whether you are a manager, single user or part of a larger team. With CIS CRM you can also stay up to date with client (and competitor) activity.

1.1 USING CIS CRM EFFECTIVELY

The journey from turning opportunities into new business begins with your search profile – setting out clearly what projects your company are interested in. It is important to define and prioritise your profile in terms of the sectors, regions and stage of project lifecycle that present you with the best opportunities.

By doing this you will be able to streamline the large volume of project leads available into a manageable set of candidates for your business.

Having a profile that is too wide in scope will yield too many leads and quickly become unmanageable.
The other important element of making CIS CRM work efficiently for you is time. You need to set aside time each day or week to keep your pipeline up to date and manageable.

Getting your profile right and spending a little time each week on your prospects will make CIS CRM an effective tool in generating new business opportunities. The CIS team are always on hand to help you define your profile.

1.2 THE CIS SALES CYCLE

Once you have defined your profile and are receiving regular details of relevant projects through your saved searches then by following these steps you can be sure that your pipeline is up to date in terms of yielding you the best quality opportunities.

1.**Track Projects & Set a Recall Date**
Look at new leads presented by your profile and track those that you feel offer an opportunity. Decide what action you are going to take on these opportunities and set a recall date for thataction or for any future action.

2.**Action alerts from CIS**
Once you track a project CIS will monitor it and send you an alert if anything significant changes. For example if the project goes out to tender or if planning is decided. When you receive these alerts you can look at the tracked project and decide if the change in the project's status warrants any action on your part. As this is a tracked project you will already have a future recall date set and actions to take and it may be that these are sufficient regardless of the change in project status.

3. **Action Projects Due for Recall**
From your tracked project list you will quickly see which projects are due for recall. By examining your project notes you can take the appropriate actions. After making notes on your latest actions you can then set a future recall date for the project or, if it no longer represents and opportunity, you can stop tracking the project and record an outcome i.e. Contract Won, Contract Lost or whatever reason you have for no longer tracking it.

BUILD A PROFILE

TRACK OPPORTUNITIES

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