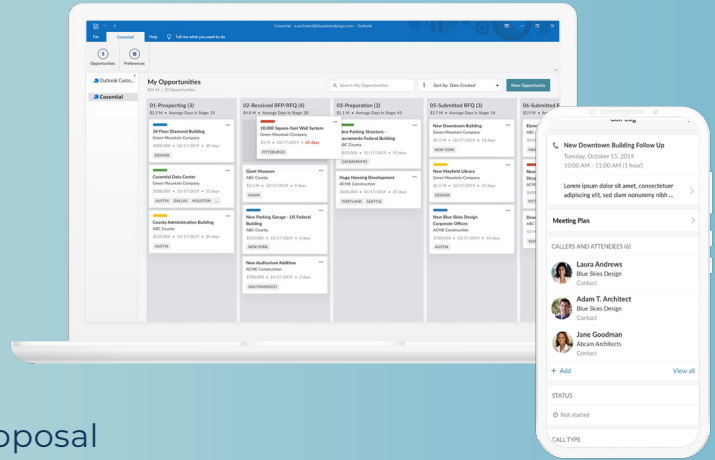




Not all CRM platforms are alike

The only project-based growth CRM and Proposal Management software built for Architecture, Engineering, and Construction firms, by AEC industry experts



We're the #1 Choice for AEC Professionals

Work with a Company You Trust

Just like our parent company, Unanet, the Cosential staff is AEC experienced and focused, providing our clients with top notch support and industry knowledge. Every single Unanet CRM by Cosential account is an A, E, or C firm, and each one is provided with implementation and support from our US-based team.

Tap into a Single Source of Truth

Our scalable, secure platform lives on the cloud. With open integrations, users can access all the data they need from their computer or phone. The dedicated mobile app lets you view contacts, leads, opportunities, historical information, projects, and more—at your desk or on the go.

“For four consecutive years, Unanet CRM by Cosential has dominated respondent’s top choices for CRM software with Salesforce trailing behind at between 9% to 15%. The ‘Other’ category included a collection of write-in answers prior popular CRMs such as Zoho, or Deltek—although none of them appearing frequently enough to comprise 1% or more.”

**2020 Construction Technology Report
JB Knowledge**

“There’s no point in bringing a software onboard, or any system or any process, if your users aren’t going to adopt it. And I think that’s what I love about Unanet CRM by Cosential, is that they will adopt it. It’s intuitive, it’s easy for people to grasp, and that once they start using it, they love it.”

**Jennifer Waugh,
Director of Marketing,
Fishbeck**

Adopt a System the Entire Team Can Enjoy

Operate as a unified company by bringing your data together. Our clients have seen a 70% adoption rate within the first 30 days of Unanet CRM by Cosential implementation.

Contact Management

Automate Your Address Book

Manage contact information in one place. Our Microsoft Outlook experience lets you create leads, contacts, or call logs while managing pipeline/opportunity stages with a simple drag and drop. Collect all the details you need with our AI-driven signature scraping tool.

“The beauty of [Unanet CRM by Cosential with Outlook] is that I don’t even feel like I’m updating data.”

Jim Cecil
Director of Business Development
A.P. Construction

Pursuit Management

Show Pursuits What You’ve Got/Who’s Boss

Manage leads, opportunities, activities, projects, and people, and assign current or future activities to each. Use our tool to track and calculate years of experience, certifications, and licenses—or even bid on one project with multiple partners while forecasting everything as one overall opportunity.

“Unanet CRM by Cosential’s New Business Development Experience is a game-changer, enabling us to move fast, drive predictable revenue, and be more strategic all while ensuring our entire firm is on board.”

Ryan Hutchins
Executive Vice President
Gilbane Building Company

Decision Support

Win the Projects You Want, Ditch the Ones You Don’t

Get go/no-go decisions on the fly. Configure your own question criteria to see which projects are worth investing in and which ones to ditch. Build, customize, and save detailed yet simple reports, view pipelines, or export the data to excel. Unanet CRM by Cosential seamlessly integrates with other analytics tools like PowerBI, enabling smarter business decisions that increase profit margins.

“Unanet CRM by Cosential is a huge time-saver when all I have to do is make one change to a project on my dashboard and it populates all the associated records within Unanet CRM by Cosential. It keeps me focused on my pipeline instead of data management.”

Chris Jacobs
Senior Market Data Analyst
JE Dunn

Proposal Management

Show Competitive Advantage with Proposals That Win

Merge project data, resumes, and images into one proposal. Access Adobe InDesign and MS Word files, or upload other file types that fit your workflow. Resume content and certifications are automatically updated, so proposals accurately reflect your firm’s experience. Configure unlimited proposal templates or pull past project data in from a financial system.

Unanet CRM by Cosential for Mobile and Outlook

Convenience and familiarity lead to increased productivity

Imagine running on the power of your firm's data while connecting with your contacts, leads, and maintaining your pipeline straight from Outlook, or managing your contacts and feed teams critical milestone moments straight from your smart phone. Unanet CRM by Cosential enhances the way you do business by offering a hand in easily linking your daily habits to your advanced strategic pursuits. Take your Customer Relationship Management (CRM) to the next level by working where your Business Development team's daily habits already thrive.

Challenges for AE Firms

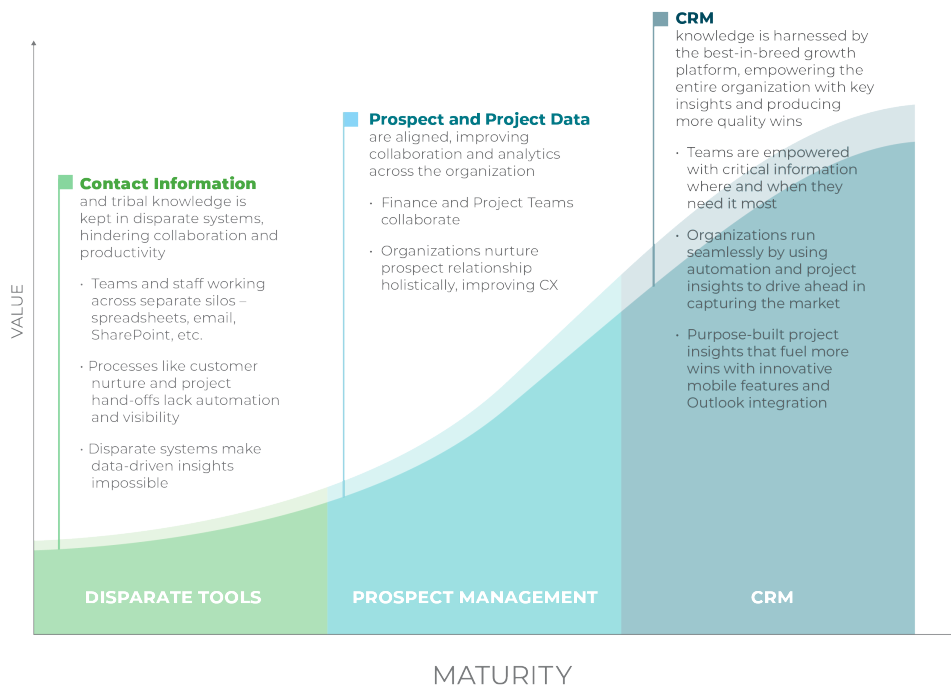
The information needed to pursue and win business is spread across systems and teams, making collaboration and data-driven decisions impossible.

- Disparate systems and tribal knowledge
- Collaboration and processes hindered by lack of centralized CRM
- Spreadsheet chaos

Why Best-in-Class

- CRM that delivers project insights to Business Developers, Seller-Doers and Marketers where they are—whether in their email or on the go
- Purpose-built innovations like mobile Caller ID, Business Card scan and Outlook integration
- Easily collaborate across the organization to nurture prospects and produce more quality wins

CRM OPTIMIZATION JOURNEY



Where Information Means Insight

Unanet is a leading provider of ERP solutions purpose-built for Government Contractors, A/E, and Professional Services. More than 3,200 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, and nurture business growth.