

Customer Spotlight: RAFN

From Manual Tracking to Strategic Growth: RAFN's CRM Evolution

RAFN is a construction firm known for its strong project pipeline and relationship-driven approach to winning work. With around 75 employees and a dozen project managers and superintendents, the company prioritizes organization at every stage of the pursuit process. Structure, consistency, and timely communication are critical to securing projects through negotiation, qualifications, and referrals.

That's why RAFN turned to TrebleHook. They needed more than another CRM. They needed a partner that understood the rhythm of AEC business and could adapt to their unique workflow. With TrebleHook's Salesforce foundation and deep customization, RAFN found a platform built not just for their industry—but for them.

We sat down with Chris Imbeau, Marketing Director at RAFN, to learn how their team is using TrebleHook to streamline operations, strengthen relationships, and pursue the right projects.

The Breaking Point: When Reports Become Roadblocks

Before making the switch, RAFN was stuck wrestling data out of an old CRM. Reporting was clunky. Insights were buried. End-of-month metrics felt more like a fire drill than a strategic checkpoint. TrebleHook changed that. The platform's flexible reporting engine and automation capabilities turned a source of stress into a streamlined, strategic advantage.

Now, clean data flows in, and powerful reports roll out—automatically.

- **Monthly Metrics:** Custom reports land in inboxes like clockwork at month's end, cutting hours of manual work and freeing the marketing team to focus on insights, not formatting.
- **Real-Time Business Development Data:** Every weekly BD meeting runs on live data, helping the team chase opportunities, close gaps, and stay aligned with RAFN's 2025 contact activity goals.



Website
rafn.com

Industry Vertical
Commercial Construction



Turning Data into Differentiation

With TrebleHook, RAFN's outreach efforts got sharper. Having a full history of past interactions gives their team a head start in every conversation. Using the engagement module, they've built and executed targeted campaigns and events that speak directly to each prospect's development needs. It's not just about more touchpoints—it's about smarter, more relevant ones.

Backed by a Team That Gets It

TrebleHook's support isn't just responsive—it's proactive. From quick interface tweaks to larger enhancement rollouts, the team listens, understands, and delivers. RAFN sees them less as a vendor and more as an extension of their team.

"I would recommend TrebleHook to anyone who thrives on clean data and needs to have an easy way to stay up to date on their team's project opportunity pursuit efforts. Take advantage of the automation possibilities in the TrebleHook system. Use your imagination to think about what would make your life easier, and work with TrebleHook to make it happen. Don't just settle for what you know how to do, dream about what CRM opportunities are possible."

Chris Imbeau
Marketing Director, RAFN

