

# CKEARNEY CONSULTING TRANSFORMS FIRM'S OPERATIONS

## A Case Study



Most professional services firms in the Architecture/Engineering/Construction (AEC) industry submit quality proposals and then wait for prospects to respond. EMJ Construction goes a step further, but that hasn't always been the case. The firm committed to integrating internal systems and processes, which led to companywide improvements.

Now, after submitting a strategic proposal, EMJ's marketing team refers to real-time CRM data and updates the firm's website. They highlight relevant projects that match the market for their latest proposal. If they're seeking construction work for a school, for example, they'll feature signature school projects on their homepage. They also may create relevant social media posts. When prospects conduct online research, EMJ's key projects will be readily available for review.

## Data-Driven Strategy

### What's EMJ's secret advantage?

CKearney Consulting (CKC) customized the company's use of Cosential, a cloud-based client relationship management software specially designed and developed for the AEC industry.

With one click, EMJ's marketing team can review its calendar for a summary of proposal and bid due dates as well as upcoming marketing activities, such as groundbreaking events. This transparency and centralized data allow them to implement strategic measures quickly.



Deron Smith

EMJ Executive Vice President of Marketing and Communications Deron Smith says they're still learning how to maximize this software for their needs. The marketing team wants to continue improving efficiencies between its offices in Dallas, Texas, and Chattanooga, Tennessee.

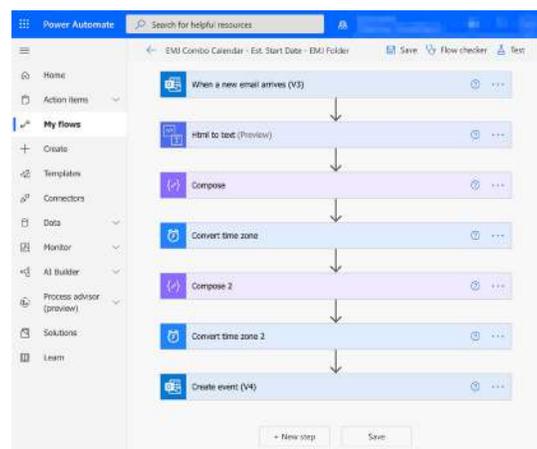
"Now we have more data accuracy," he said. "We can trust the information that's in Cosential because there's more transparency and accountability. It's a single source of truth."

Before going with CKC and Cosential, Deron noted the company's bid calendar required manual input by one person. Data was sometimes incomplete or unavailable.

After working with CKC, the construction firm implemented data entry requirements. Through a seamless automated process, the calendar is continually updated. This company saves hours of preparation time each week.

Besides the marketing team, several other departments rely on Cosential. Business development, accounting, and operations all use the improved Cosential dashboards to keep an accurate pulse on their business pipeline and opportunities.

Deron credits Courtney Kearney, owner and founder of CKearney Consulting, for streamlining business processes and responding to their requests to maximize the use of Cosential.



Power Automate Flow to Automate Cosential Dates to an Outlook Calendar

**“CKC streamlined our business processes and responded to our requests to maximize the use of Cosential.”**

*Deron Smith, EMJ Vice President of Marketing and Communications*

## Overcoming Disjointed Data

A few years ago, EMJ had disjointed data in multiple systems. The company didn't have a central location for critical dates and data. They used one CRM system for business development activities and a different CRM plus other platforms to house marketing and project data. Eventually, EMJ's management agreed the multiple systems and complex processes no longer met their needs.

Management decided Cosential would be the single source of truth. There was an expiring contract for one of EMJ's alternate systems, which put an urgent deadline on the project. To successfully implement this change in a short time frame, EMJ turned to CKearney Consulting for help.

Deron met Courtney a few years earlier when he attended a CKC training session. She emphasized, "That which has been typed should never be typed again." That rule resonated with Deron. He realized EMJ was entering data multiple times in different locations. He knew their system needed an updated approach.

During the transition process, CKC provided a bridge between EMJ and Cosential. "Courtney can ask the right questions and talk tech," Deron said.

## Experience Matters

Like EMJ, Courtney and her team focus on providing an exceptional client experience. For anyone considering implementing Cosential, Deron said their first action should be to budget for the software. Their second move should be to call CKC for customized solutions.

To learn more about CKearney Consulting and how we can help you achieve your firm's CRM goals, visit [www.ckearneyconsulting.com](http://www.ckearneyconsulting.com) or contact Valerie Delafosse at [valerie@ckearneyconsulting.com](mailto:valerie@ckearneyconsulting.com) or 713.305.5578 to book a discovery call.

### CKC - EMJ Milestones

- 2/2018: EMJ first hired CKC for CRM services
- 1/2020: EMJ attended CKC Cosential Workshop
- 2/2020: EMJ hired CKC to provide additional services
- 5/2020: CKC migrated CRM data into Cosential
- 5/2020: EMJ's Marketing Coordinator took maternity leave and CKC provided proposal support
- 11/2020: EMJ renewed CKC's consultative retainer
- 1/2021: CKC automated calendar functions for EMJ



Courtney Kearney

