

# AEC360

## AEC360 Overview:

AEC360 leverages more than 25+ years of AEC experience and 12+ years of Dynamics CRM experience to engineer and deliver a purpose-built CRM solution that is designed to support the business development and marketing requirements of the diverse practices within the AEC marketplace.

### AEC360's Pre-Configured Application Layer:

- At the core of the AEC360 solution is the Microsoft Dynamics 365 platform
- AEC360 is an AEC application layer that is built to run as an extension of the Dynamics 365 platform for both cloud and on-premise environments
- The AEC360 solution delivers a powerful set of application modules that extend the functionality of Dynamics to support the unique requirements of AEC companies



### Microsoft/AEC360 Functionality:

- Centralized database of clients, accounts, contacts, projects, employees & relationships
- Opportunity Tracking, Pursuit Management & Pipeline Reporting
- Native Outlook user interface delivering full CRM functionality within Outlook
- Track Outlook activities, such as emails, appointments & tasks directly to CRM
- Automatic data harvesting & relationship intelligence tools
- Marketing List, Campaign, and Event Management
- Full mobile platform for phones, tablets & Surface devices
- On-Line & Off-line Functionality to support the mobile work force

### The AEC360 Difference:

- Provides a 360° view of clients, contacts, employees, opportunities & projects
- Relationship Intelligence: "It's not always what you know, it's who you know!"
- Project Lead & Opportunity "Scoring" to focus & pursue the right opportunities
- Experience & Talent Management and Reporting
- Pre-configured AEC Dashboards & Reports
- Outlook Contact Harvesting, automated contribution/assembly of relationships
- Document Assembly, Resume Generation, Proposal Automation, & Adobe InDesign Integration
- Competitive Tracking & Analysis, including win / loss reporting
- eMarketing and Marketing Automation Integration

### Sync360 - Data Harvesting & Integration

- Outlook Contact Contribution and Relationship Mapping
- Integration with the Industry's leading time/billing/practice management solutions
- Strength of relationship "scoring" to leverage the strongest relationships

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360° of a Contact

NEW

SEND EMAIL CAMPAIGN

DEACTIVATE

CONNECT

ADD TO MARKETING LIST

ADD SIGN

EMAIL LINK

UPDATE

FORM

CONTACT CONTACT - JACOB

Paul Shank

General

Full Name

Paul Shank

Job Title

Chief Operating Officer

Company Name

Maryland Aviation Administration (BAA)

Email

psank@baa.org

Business Phone

+1 (202) 598-8833

Mobile Phone

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Preferred Method of Contact

Any

Personal

Marital Status

Married

Gender

Male

Spouse/Partner Name

Sharon

Birthday

02/01/1975

Assistant Name

Meredith

Categories

Role

Decision Maker

Lead Source

CMO

Address

123 Main Street

Frederick, MD 21766-7670

United States

PROVIDE

ACTIVITIES

NOTES

ALL

+

ADD PHONE CALL

ADD TASK

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+

T

Paul Shank

Spoke with Paul, playing golf on Saturday

Completed by Cole Michael: 8/22/2017 2:57 PM

Paul Shank

Sign notes around phone call

Completed by Cole Michael: 7/27/2016 2:58 PM

Paul Shank

Spoke with Paul to discuss the upcoming deadline around the security checkpoint

Completed by Cole Michael: 6/25/2015 9:02 AM

Call with Paul Shank to discuss BAA Airport Renovation

COMPLETED

Call Date: 10/26/2016 9:59 AM

Modified by Cole Michael: 6/25/2015 8:47 AM

Paul Shank

Discussion around lighting systems

Completed by Cole Michael: 6/25/2015 8:47 AM

Paul Shank

Spoke with Paul about BAA Design

Completed by Cole Michael: 6/25/2015 8:47 AM

Client Status

Prospect

Preferred Method of Contact

Owner

Cole Michael

Relationship

Employee

Strength of

Type of Relationship

City/State

Steve Andrews

65

Positive

Chesapeake

Dave Mathison

47

Positive

Boston

Cole Michael

15

Neutral

Atlanta

Previous Employment

Previous Company

Years Active with Firm

Chesapeake City Hall

1995 - 2001

Maryland Port Administration

2001 - 2005

Project Leads

Name

Project Owner

EC

West Bend Municipal Airport

Maryland Aviation Administration -

Bd

BAA Security Improvements

Maryland Aviation Administration -

EC

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Business Development Dashboard

SAVES ALL

NEW

REFRESH ALL

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AEC360 KPI Dashboard

Pipeline

AEC360 Opportunities

1

2

3

4

5

6

Est. Revenue by Market

AEC360 Opportunities

Est. Revenue by Delivery Method

AEC360 Opportunities

Est. Revenue by Regional Office

AEC360 Opportunities

Deals Won vs. Deals Lost

AEC360 Closed Opportunities

# New Business Pursuit

+ NEW + OPEN DOCKY + CLOSE AS LOST + CREATE PROJECT + FORM + PROCESS + ASSIGN + EMAIL LINK + ...

**BWL Airport - Renovation**

Award Date 3/25/2016	Est. Revenue \$5,000,000.00	Probability 50	Opportunity Owner <a href="#">Cale Miller</a>
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**Identify Active to B2B** | **B2B Kick Off Meeting** | **Develop Capture Plan** | **Pitch Proposal** | **Develop Proposal** | **Shortlist Interviews** | **Award** | **Completion & Sign Off** | **Negotiations** | **JOB Set Up**

**Name \*** BWL Airport - Renovation  
**Name Opportunity \*** + 1026-BMW  
**Client Name \*** Maryland Aviation Administration (MAA)  
**Primary Contact \*** Paul Shanks  
**Opportunity Owner \*** Cale Miller  
**Office Location \*** Northwest  
**Market \*** Aviation  
**Sectors \*** Airport  
**Work Type \*** Highway  
**Civilian/Military \*** Civilian  
**Go/No-Go \*** GO

**Summary**  
 Total Project Value \$14,000,000.00  
 Fixed Fee Price \$0  
 Fixed Fee Percentage 40  
 Fixed Fee Revenue \$5,600,000.00  
 Risk Factors Schedule  
 Probability High  
 Owner Decision Year 2017

**Cost of Work**  
 Annual Budget \$2,000,000

**Scope:**

BWL Thurgood Marshall Airport is undergoing a \$105 million expansion that will support the airport's growing international traffic and provide additional amenities for passengers. The multi-phase project will be completed in 2017 and include a new security checkpoint connector between concourses D and E, and add new gate gates that will be used by international carriers.

**Current Strength: 75%**

- Donor
  - Maryland Aviation Administration (MAA)
    - Paul Shanks
  - Sub Consultant
    - Robert J. Hill Engineers Inc.
    - Adam Jones
    - BJ Design
    - New South Construction Company, Inc.
    - Harty Gordon

**Tenuring Factors**

Company	Role	CS
Robert J. Hill Engineers Inc	Sub-Consultant	
BJ Design	Sub-Consultant	

**POINTS ACTIVITIES NOTES**

All | Add New Item | Add Task | ...

**EPA Agreement**  
Open note for EPA meeting  
Modified by: Cale Miller 4/28/2017 11:03 AM

**Cale Miller**  
Task Item email CRM0001493  
4/28/2017 11:03 AM

**Cale Miller**  
Submitted for Bid Approval: BWL Airport - Renovation CRM0001514  
12/19/2016 6:48 PM

**Personal Appointment**  
Meeting with John  
Modified by: Cale Miller 11/19/2016 12:43 PM

**Kennedy-Johns Appointment**  
Learning more about bid  
Modified by: Cale Miller 11/19/2016 12:30 PM

**HCWHR - Bristol - Demonstration**  
HCWHR-Bristol  
COMPLETED

Open

# Full Mobile Applications

Cost effective cloud licensing options,  
a reduced amount of services required  
for implementation & configurations,  
affordable for all sizes of businesses

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