



Brochure

aec360
— by sa.global —

aec360
engage

Marketing, Business Development, Experience Management, and **Relationship Intelligence**

When it comes to marketing and business development in the AEC industry, your firm's relationships and experience must be up front and center. Ensuring that your firm is making wise business development investment decisions, building proposals that highlight the best possible experience and qualifications, and effectively leveraging your network of relationships are all critical aspects of winning new business. Your CRM system, therefore, needs to be an integral part of your firm's success.

aec360 engage provides a comprehensive cloud-based marketing, business development, experience management, and relationship intelligence solution – all built natively within Microsoft's industry-leading Dynamics 365 CRM application.

In addition to providing complete pursuit management and go/no-go decision support, aec360 engage offers a full experience management library and an innovative passive data collection strategy that reduces the need for your sellers/doors to enter information into a CRM system. This, along with a unique interface directly embedded in Outlook and a full cross-platform mobile app, can help your firm drive user adoption and ensure that your CRM data is complete.

Built with the AEC industry in mind, aec360 engage provides the foundation your firm needs to maintain a 360-degree view of your clients, contacts, relationships, pursuits, experience, and growth initiatives.

Core features of aec360 engage

Relationship Management

- Client and contact management
- Automated data harvesting
- Activity tracking
- Relationship connections
- Data quality management
- High-value contacts
- Relationship scoring
- Who knows who?
- Relationship trends



Business Development

- Lead tracking
- Pipeline management
- Opportunity scoring
- Go/ No-go automation
- Risk evaluations
- Pursuit budgets
- Job setup forms
- Notifications and approvals
- BD analytics



Marketing

- Project history database
- Employee experience
- Resume management
- Document assembly
- SF330s and government forms
- Marketing list management
- Events and campaigns
- eMarketing



Third Party Integrations

- Accounting and ERP systems
- Project management tools
- HR and payroll systems
- LinkedIn sales navigator
- Open asset
- InDesign
- Office365
- Construction market data sources
- Company websites



The aec360 **engage** difference

The Microsoft advantage

- Built on the award-winning Microsoft Dynamics 365 CRM platform
- Familiar Microsoft user interface embedded in Outlook
- Integration across Microsoft Office 365, LinkedIn, and the Power Platform

Modern

- The AEC industry's most modern business management platform built as a native cloud service on the Microsoft Azure platform
- Takes advantage of Microsoft's unmatched security, privacy, and compliance portfolio
- Designed to leverage Microsoft's leading-edge advanced analytics, artificial intelligence, and collaboration technologies

Comprehensive

- The only fully integrated Marketing, Business Development, Experience Management, and Relationship Intelligence suite from a single vendor

Why aec360 **engage** works for AEC firms?

aec360 engage was specifically designed to overcome the inherent challenges of CRM in AEC firms. Our solution leverages native integration with Microsoft Outlook and Microsoft Office to employ a unique automated data collection strategy, providing an integrated experience management and relationship intelligence platform. aec360 engage also seamlessly integrates with industry-leading project management, accounting, recruitment, and talent management solutions to help your firm gain a 360-degree view of your client activities.





Why sa.global and **aec360**?

sa.global is one of the largest Microsoft Dynamics 365 partners in the world, and the leading provider of Microsoft Dynamics 365 solutions to AEC firms and other professional services organizations. sa.global has won 10 Microsoft global and industry Partner of the Year awards, and is a proud member of Microsoft's Inner Circle, representing the top 1% of Microsoft partners worldwide.

The aec360 business management platform offers an integrated cloud-based solution spanning your firm's CRM, Enterprise Resource Planning (ERP), Human Capital Management (HCM), and BI needs. It is the industry's

broadest business suite purpose-built for AEC firms, and is designed to help your firm gain a 360-degree view of your clients, projects, finances, and employees. aec360 also leverages your firm's existing Microsoft investments – the Azure cloud and other Microsoft tools like Office 365 and Power BI – to put productivity and insights where you need them most – in the hands of your employees.

**Microsoft
Partner**

2019 Partner of the Year Winner
Dynamics 365 for Sales Award
2019 Partner of the Year Finalist
Dynamics 365 for Talent Award
Media & Communications Award

2019/2020
INNERCIRCLE
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