

Hellmuth Obata & Kassenbaum

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The Business

Established by three principals and 26 employees in 1955, Hellmuth, Obata & Kassabaum (HOK), Inc. is now the world's second-largest architectural firm according to World Architecture magazine, January 2001. HOK offers integrated services to clients in various markets through many locations worldwide. The firm's customers include major corporations, institutions, and governmental agencies. Its past projects include sports complexes, airports, governmental facilities and retail and commercial buildings. The organization's size and geographical dispersion made lead sharing and sales coordination difficult. Sales people in different offices often found themselves competing for the same business. This sort of conflict lowered HOK's potential for winning the business, created double-booking of single opportunities in the firm's forecasts, misused sales resources and created potential embarrassment with the prospect. HOK was also limited in its ability to view relationships between prospects and existing clients. This weakness negated any possible leverage the firm could gain in the sales process from these relationships.

In addition to problems created by the organization's size, the decision-making process for architectural design at this high level typically takes five to six years from concept. In spite of the snail's pace of project development, HOK gets involved in the process as soon as possible to ensure a successful sales effort.

The Challenge

HOK's sales process was hamstrung, wasting valuable resources and talent. To properly manage its sales efforts and such a long sales cycle, HOK needed a customer and sales management system that could optimize the use of all its sales and design resources. The system would have to provide a detailed view of the customer and its affiliates.

Additionally, in order to accurately project resource requirements for its enormous projects, the firm needed an accurate and robust forecasting capability.

But the firm also faced risks in launching a new system. In the complex business of architectural design, sales success is predicated on superior customer relationships, accurate resource projections and design savvy. Its new system, implementation and performance, needed to live up to these high standards.

The Stakes

As anyone at the top knows, the higher you are, the more you have to lose. HOK risked its architectural reputation with organizational inefficiencies. The firm needed to resolve its systems issues to preserve its standing as a premier design firm, promote revenue growth and leverage existing customer relationships.

The Solution

After evaluating over forty possible solutions, HOK chose eVentive to create a worldwide, integrated customer and sales management solution. eVentive helped HOK implement a Pivotal CRM solution by customizing various aspects of the application to meet HOK's unique needs. eVentive created and implemented a workflow for managing customer parent/off-spring relationships. The firm also integrated syndicated data with HOK - specific data to enrich the view of the customer. By adding a robust forecasting capability to the system, eVentive eliminated double-booking of expected revenue.

The Benefit With its new system, the sales organization can access a single database containing all prospects and customers. For the first time, both sales people and senior management can view clients the way the client views their business with HOK. The single database eliminated intra-firm competition for projects and enhanced team-selling efforts, which often span continents. Sales pursuit teams are better equipped to close deals and assign project resources. Overall, increased sales efficiency, more accurate forecasts and improved customer relationships have positively affected HOK's bottom line.