Subcontractor Management in Project-CRM

In the construction industry, effective project, and customer relationship management (CRM) tools are invaluable. KMS, a specialist in construction CRM solutions, offers KMS Project-CRM, a versatile solution designed to streamline various aspects of construction operations. Among its many features, KMS Project-CRM simplifies subcontractor management, eliminating the need for cumbersome spreadsheets. In this article, we'll explore how KMS Project-CRM can assist in optimising the subcontractor management processes.

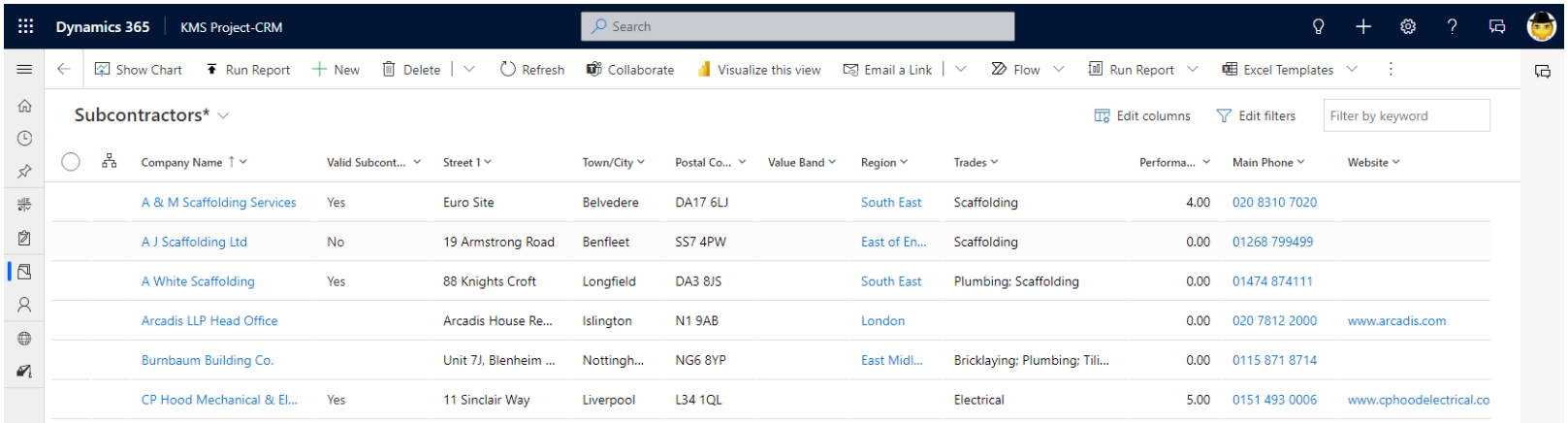
Data Capture: The Foundation of Subcontractor Management

Managing subcontractors effectively hinges on comprehensive data capture. KMS Project-CRM excels in this regard by offering two primary areas of data capture:

1. Subcontractor Company/Contacts:

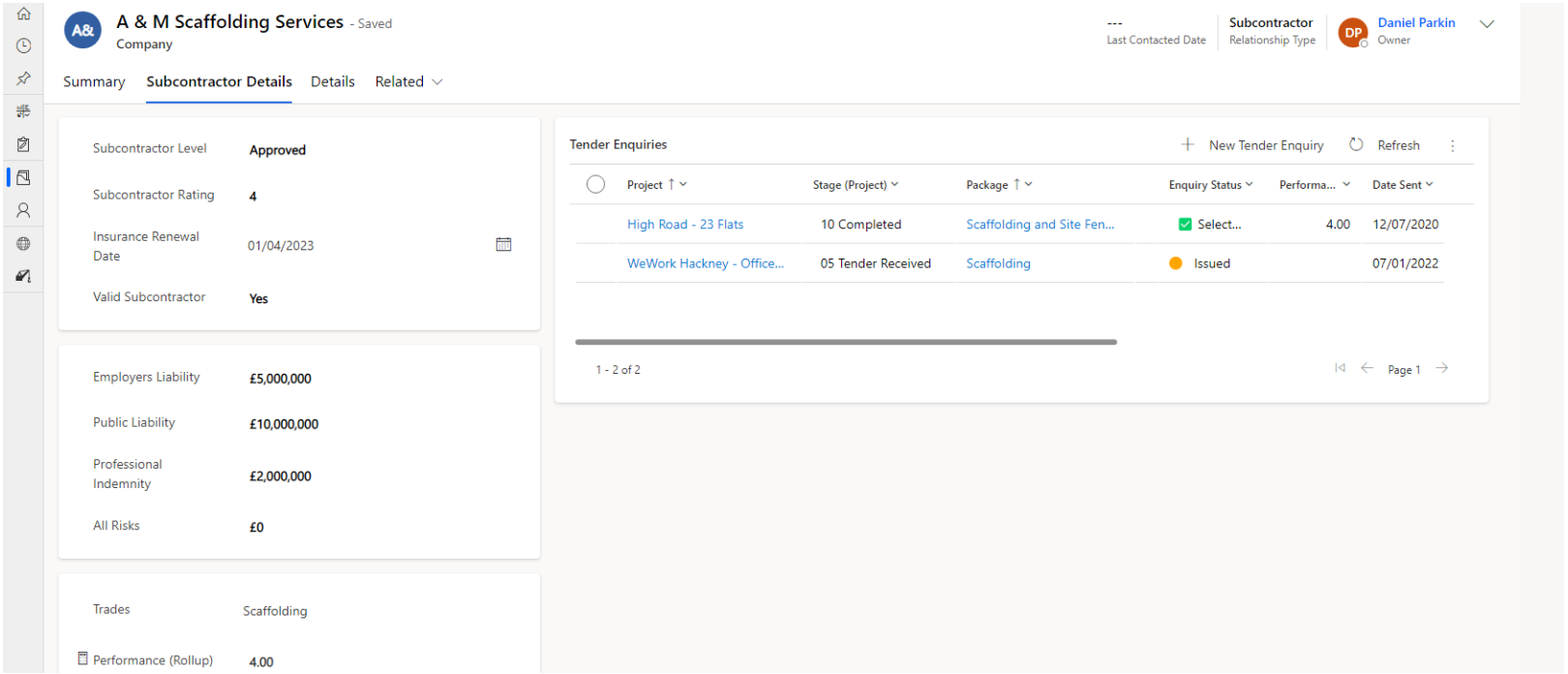
   In your CRM database, subcontractors are treated just like any other company but come with a wealth of additional details. These details encompass crucial information such as insurance coverage, trade expertise, and performance ratings. This feature ensures that you have a holistic view of your subcontractors, enabling informed decision-making.

   Subcontractor Views in Project-CRM:



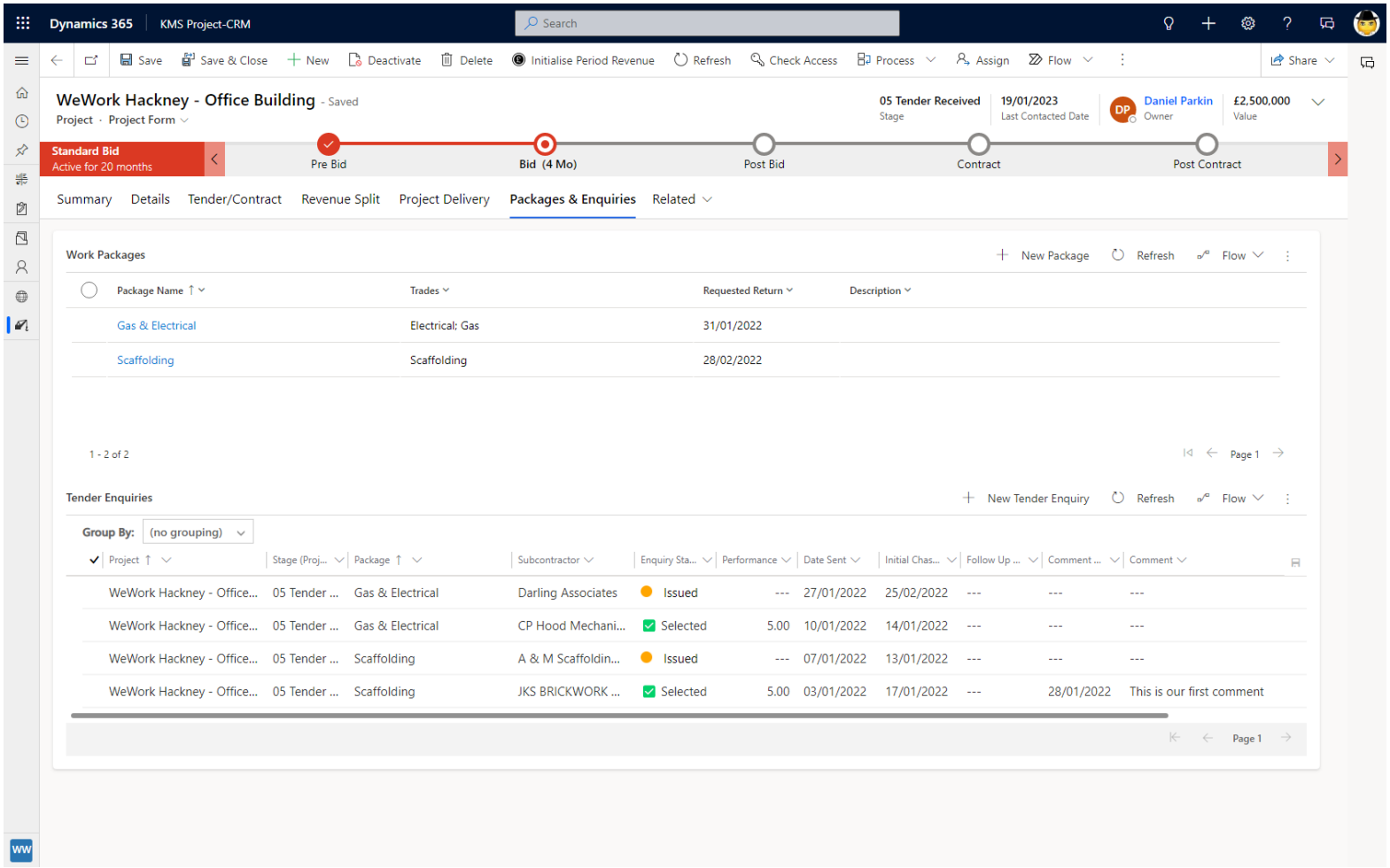
Company Name	Valid Subcont...	Street 1	Town/City	Postal Co...	Value Band	Region	Trades	Performa...	Main Phone	Website
A & M Scaffolding Services	Yes	Euro Site	Belvedere	DA17 6LJ		South East	Scaffolding	4.00	020 8310 7020	
A J Scaffolding Ltd	No	19 Armstrong Road	Benfleet	SS7 4PW		East of En...	Scaffolding	0.00	01268 799499	
A White Scaffolding	Yes	88 Knights Croft	Longfield	DA3 8JS		South East	Plumbing; Scaffolding	0.00	01474 874111	
Arcadis LLP Head Office		Arcadis House Re...	Islington	N1 9AB		London		0.00	020 7812 2000	www.arcadis.com
Burnbaum Building Co.		Unit 7J, Blenheim ...	Nottingh...	NG6 8YP		East Midl...	Bricklaying; Plumbing; Tili...	0.00	0115 871 8714	
CP Hood Mechanical & El...	Yes	11 Sinclair Way	Liverpool	L34 1QL			Electrical	5.00	0151 493 0006	www.cphoodelectrical.co

Let's take a closer look at a sample subcontractor record in Dynamics:



2. Tender Enquiries:

One of the standout features of KMS Project-CRM is its ability to build packages within a project and seamlessly associate them with subcontractors. This not only simplifies the process of tracking tender enquiries but also provides a centralised hub for monitoring and managing subcontractor-related tasks. Packages can be created, and then each package can be assigned to a set of subcontractors:


Dynamics 365
KMS Project-CRM
Search
Save
Save & Close
New
Deactivate
Delete
Initialise Period Revenue
Refresh
Check Access
Process
Assign
Flow
Share
WeWork Hackney - Office Building - Saved
Project · Project Form
05 Tender Received
Stage
19/01/2023
Last Contacted Date
Daniel Parkin
Owner
£2,500,000
Value
Standard Bid
Active for 20 months
Pre Bid
Bid (4 Mo)
Post Bid
Contract
Post Contract
Summary
Details
Tender/Contract
Revenue Split
Project Delivery
Packages & Enquiries
Related
Work Packages
New Package
Refresh
Flow
Package Name
Trades
Requested Return
Description
Gas & Electrical
Electrical; Gas
31/01/2022
Scaffolding
Scaffolding
28/02/2022
1 - 2 of 2
Page 1
Tender Enquiries
New Tender Enquiry
Refresh
Flow
Group By:
(no grouping)
Project
Stage (Proj...
Package
Subcontractor
Enquiry Sta...
Performance
Date Sent
Initial Chas...
Follow Up ...
Comment ...
Comment
WeWork Hackney - Office... 05 Tender ... Gas & Electrical Darling Associates Issued --- 27/01/2022 25/02/2022 --- --- ---
WeWork Hackney - Office... 05 Tender ... Gas & Electrical CP Hood Mechani... Selected 5.00 10/01/2022 14/01/2022 --- --- ---
WeWork Hackney - Office... 05 Tender ... Scaffolding A & M Scaffoldin... Issued --- 07/01/2022 13/01/2022 --- --- ---
WeWork Hackney - Office... 05 Tender ... Scaffolding JKS BRICKWORK ... Selected 5.00 03/01/2022 17/01/2022 --- 28/01/2022 This is our first comment
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Business Uses: Harnessing Subcontractor Data for Success

Once you've harnessed this data, you can leverage it in a myriad of ways to optimise your operations and improve overall project performance. Here are some key applications:

1. Insurance and Approval Management:

   Use customised views and alerts to ensure that insurance details for subcontractors are consistently up-to-date. With KMS Project-CRM, you can even automate the approval process for new subcontractors after they've successfully undergone your qualification procedures.

2. Tender Enquiry Tracking

   Say goodbye to the chaos of managing multiple subcontractor quotes across various projects. KMS Project-CRM empowers you to keep a tight grip on tender enquiries and return dates. Whether you prefer a project-specific approach or want to view a comprehensive list of outstanding enquiries, the system has you covered.

3. Performance Monitoring:

   Performance Monitoring: Performance is paramount in the construction and project management realm. By scoring subcontractor performance on each project, KMS Project-CRM allows you to create a valuable profile of your best-performing subcontractors. This not only rewards excellence but also helps you identify areas for improvement.

With KMS Project-CRM's subcontractor management capabilities, project-centric businesses can bid farewell to the days of spreadsheet chaos and embrace a streamlined, data-driven approach to managing subcontractors. By centralising data capture and offering a plethora of practical applications, this CRM solution empowers organisations to optimize their operations and deliver exceptional results on every project.

Contact KMS via phone or email to find out more:

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