



 **AUTODESK** Construction Cloud

sorellaGROUP
SPECIALTY CONTRACTOR

Sorella Group Overhauls Bid Management with Bid Board Pro, Increasing Bid Submittals by 15%

Founded in 2006, Sorella Group is a Division 10 Specialty Subcontractor headquartered in Kansas City that provides product installation and full-service carpentry packages nationwide. Antiquated and disjointed methods for managing bid invitations led to data loss and missed deadlines. With the implementation of Bid Board Pro, Sorella Group improved processes for tracking and managing bid invitations, resulting in an increase of bid submittals by 15%.

Customer Snapshot

FIRM SIZE: <500
FIRM TYPE: SPECIALTY CONTRACTOR
REVENUE: \$13 MILLION
FOCUS AREA: INSTITUTIONAL
HQ: KANSAS CITY, MO, US

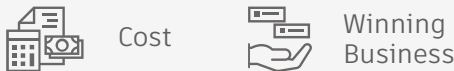
PHASE:



CAPABILITIES:

- Bid Management

OUTCOME:



Challenge: Unorganized Bid Management Led to Missed Opportunities

Contracting services across diverse markets, including transportation, federal government, and healthcare, Sorella Group prides itself on being accomplished, reliable, and proactive. Fragmented processes presented a challenge to organizing and tracking bids, managing and pursuing top customers, and measuring win rate over time. “Our process for managing bid invitations was cumbersome,” says Chris Anderson, Sales Estimator at Sorella Group. “With bids coming from multiple sources and in inconsistent formats, we had difficulties sorting and compiling information in an easily digestible format. This led to information loss and missed deadlines.”

For subcontractors, organizing and keeping track of many simultaneous opportunities is a struggle. With Project Managers juggling between 50-60 bids at any given time and 300-500 different projects assigned to Estimators daily, Sorella Group was in the market for an easy-to-use solution that could help them sort and determine which bid invitations were the best fit for the company.

Solution: A Connected Tool to Organize, Manage, and Track Bids

Sorella Group invested in Bid Board Pro to make it easier to follow up on leads and prioritize bids. With Bid Board Pro, Sorella Group has increased visibility into bidding and can consolidate multiple bid packages for the same project into one entry. The result is better



coordination and communication around numerous projects, all of which drives quality.

“With a single platform for bid management, we have more control over bidding cycles and can minimize information loss,” says Anderson. “The flexibility of the solution lets us drill down into different areas of a project to track when bids are due, organize milestone events, like job walks, and access all bid details to deliver what the customer needs.”

“

Bid Board Pro enables us to easily track, coordinate, and manage numerous projects at the touch of a button. With increased visibility into our pipeline, we’re able to bid more, bid smarter, and drive quality.”

-Chris Anderson
Sales Estimator,
Sorella Group

By using a centralized platform, teams can quickly access information to closely monitor and measure estimates, sales, and close ratios while tracking top customers. With greater insight into their win rate, Sorella Group can identify and select bids based on the potential success rate. As a result, they have been able to improve and grow their business.

Success: Better Documentation and Coordination Leads to an Increased Bid Rate

Choosing the right projects to bid on can be a challenge, and submitting winning bids requires significant time and resources. By bidding smarter with Bid Board Pro, Sorella Group can track General Contractors (GCs) to see who they’ve have had success with in the past and who they’re building relationships with to prioritize bids and increase win rate.

With Bid Board Pro, Sorella Group has grown by 57% and went from \$3 Million to \$13 Million, which would not have been possible without using a bid management platform. The company has also been able to take on 15% more bids by having a streamlined process during preconstruction.

“If you are not willing to adopt technology, you will have a hard time staying up-to-date with bids,” says Anderson. “Bid Board Pro enables us to easily track, coordinate, and manage numerous projects at the touch of a button. With increased visibility into our pipeline, we’re able to bid more, bid smarter, and drive quality.”

