

# CSA GROUP



**Industry:**

Architecture, Engineering,  
and Environmental Consulting

**Geography:**

Headquartered in  
Miami Lakes, FL, USA

10 offices across North  
America and South America

**Employees:**

500

## Challenge

In order to be more responsive to its clients, CSA Group had expanded its operations to multiple office locations and divisions over a diverse geographic area. Over time, CSA's business processes and IT resources were becoming increasingly stressed and outdated. They needed a more effective way to track their activities with client accounts and contacts and also to facilitate their lead and opportunity pipeline.

With sources of information residing in various areas of the company, CSA's business development managers were stepping over each other's activities. There was no cohesive application to track all of the activities related to account and opportunity management. Redundant processes of updating multiple spreadsheets were consuming more time than necessary. Reports became quickly outdated because of static data.

Additionally, CSA's executives had no way to measure their opportunity pipeline across the multiple disciplines within the organization.

Key accounts were sometimes left untouched for months without any interaction from a designated account manager.

## Solution

CSA engaged BST Global to develop an integrated enterprise-wide client relationship management (CRM) solution to address the needs of their growing organization. CSA was already using the BST Enterprise application for all of their project financial management needs.

BST Global introduced the BST CRM Adaptor™ for Microsoft Dynamics CRM. This tool allows for seamless integration from all of the account and opportunity management functions to flow into the BST Enterprise application without redundant data entry.

Working collaboratively with BST Global, CSA examined all of its current business development processes. Through this team approach, BST Global was able to guide CSA in configuring a flexible system that

takes advantage of existing technology and can be modified for future changes and enhancements.

## Results

The new application gives CSA better insight into their business development process. And because they were able to mold the application to fit their current business processes, it allows for easy adoption among staff members. The application also makes assignment of dedicated account managers for all of CSA's existing clients a simple process.

Users are able to quickly access data relating to account and opportunity management. The solution allows a flexible and mobile means of keeping information up to date. Executives have up-to-the-moment insight into the firm's opportunity pipeline and the effectiveness of business development activities.

The BST Enterprise/Microsoft Dynamics CRM solution allows users to spend more time analyzing the needs and opportunities being presented to CSA. Overall, CSA is better able to meet the needs of their existing client base while pursuing business from new sources.

## ABOUT CSA GROUP

CSA Group is a multi-disciplinary organization that provides integrated management consulting, environmental, architectural, engineering, planning, and construction project and program management services to the public and private sectors throughout North America, Central America and the Caribbean.



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