



Construct-A-Lead MANUAL

TIPS ON USING CONSTRUCT-A-LEAD



CONSTRUCT-A-LEAD

DEVELOP LEADS. GROW YOUR BUSINESS.

HOW TO LOGIN

Go to app.construct-a-lead.com and login with your credentials.

WHAT YOU'LL SEE UPON LOGGING IN

The lifeblood of the site is the Projects page. Here you can search for construction leads, save & sort projects, put notes on projects, gain contact information, download projects (with special permissions) and ask our research department for more information on a project.

They are sorted by Date Updated, in descending order, newest first. If you only want to see brand new projects, without recent updates, just click on the heading *Date Entered*.

When you get to the Projects section, you will notice the navigation on the left. These links will allow you to save & note your projects while identifying them with the colored tabs. Those tabs are set up for your personal identification system.

NAVIGATING THE SITE

CREATE YOUR OWN TAGS

When you are looking at a report – at the top of the report it says *Add to My Project* – click on this to add to your Tag. Click the colored tag where you want the project to go to. Look at the left hand column and click on *My Projects*. You will see the default tags listed. You can use these tags OR at the bottom you will see *Add Tag* – click on this and you can create a *New Tag*.

Tags can be deleted or edited by moving the mouse over the label – an *Edit* button will appear. Click *Edit* and you can now rename / delete the tag.

ADD A NOTE

Once you've selected *Add To My Projects*, there will now be an *Add Note* button at the top of the page – this allows you to add your own private note to a project. Once you add a note all of your notes will be stacked under *Notes* in the left hand column (ordered by date). These are all of your notes from every project. Click on the specific note and it will take you to that project.

NAVIGATING **THE SITE** (CONTINUED)

CONTACT RESEARCH

You can perform *Contact Research* for any project. When on an individual project click on *Request Research*. You can send us an e-mail and we will get back to you within 24 hours.

ADVANCED SEARCH

To perform an *Advanced Search*, select *Project Search* on left and then click the *Advanced Search Options* button. The top bar searches by Project keyword, while the advanced search can help you find projects in a specific category, such as by project type, company, city, bid stage, product lists, room counts, etc. You can click on multiple construction types, bid stage, states, etc. Make sure they are green. Each project has its own unique project ID. You can search the database for a specific project if you have the project ID number.

Save your search in the *Advanced Search* section by clicking *Save Search* and then giving it a name.

THE INDIVIDUAL **PROJECTS**

Each project has a unique Project ID, generated by Construct-A-Lead as a reference.

Once you click on a project title, you are taken to the Project Overview, which gives the information regarding this project.

PROJECT **OVERVIEW**

Title: This is the title the Primary contact has given the title. If there is not one, we will usually use the address.

Cost: Total construction cost.

Project Type/Vertical: Often more than one project type fills this category.

Construction Type: New, Renovation, Addition.

PROJECT OVERVIEW (CONTINUED)

Bid Stage: Our database is divided into 8 bid stages.

- **Planning & Approval:** Project is in the design stage, or is seeking approvals from the municipality, or has been submitted for permits. There are additional requirements to fulfill prior to construction. Most often, there is a Developer, Design/Build company and / or Architect attached to the project. These are typically the decision makers when it comes to subs, materials, supplies, etc.
- **Pre-bidding:** Project will be moving forward, based on design, site approvals, or necessary infrastructure that the city agreed to. Many times, this project needs a GC or sub-contractor to proceed. Again, decisions such as materials, brands, and supplies are confirmed here.
- **Bidding:** This is where the Architect is calling for a GC and/ or the GC is calling for subs because they are in the process of bidding a specific project. This stage is usually short lived, but many decisions relevant to the project are made in this stage as well.
- **Pre-Construction:** Vendors and builders are in place and the project is ready to begin.
- **Construction:** Project is underway.
- **Completion** ■ **Cancelled** ■ **Hold**

Start & End Dates: Each project automatically updates on the given start dates and moves to the Completed stage on the given end date. If not end date is given, the project will move to Completed after two years in the Construction Stage.

Location: With zip codes and mapping.

Project Details: A brief narrative, offering more details.

Bidding Information: A project may be entered in Planning & Approval, with, for example, a start date of Q1, 2019. As we learn more about the project, additional contacts could be entered (GCs Architects, etc) and the start date can change. That project then moves to a different stage with a different start date. To further explain, let's assume the Q1, 2019 start date is accurate. The project will automatically move to construction (our database is set up that way), once the date approaches.

- **For example,** when a project is in the Bidding stage and has a bid date (bids due) of 1/20/2018, that project will automatically update to Pre-Construction on 1/21/2018 once the bids have been submitted and the bid stage has ended.

Updates: Additional information as our research team learns more about the project.

PROJECT OVERVIEW (CONTINUED)

Materials: Check the material lists to see if your product or service is listed. If it is not listed that does not mean it is not involved in the project. You know better than anyone if your product or service goes into that particular project.

Contacts: We will give you at least one key contact, although the majority of our projects have multiple contacts under this tab. Every contact has a phone number and most of our contacts have an email address, too. The email is a live link, allowing you to communicate directly. We strive to provide the main contact on every project, however, we will always give you a person who can answer your questions and lead you to the decision maker.

ADDITIONAL ACTIONS

DOWNLOAD PROJECT INFORMATION

With a paid yearly subscription, you can download our information into an Excel spreadsheet. The download will provide raw data, which will allow you to upload the data into your own CRM system. Go to [Project Search](#), add any additional parameters in [Advanced Search Options](#), then click [Download CSV](#).

Downloads are a great resource for the following:

- Call sheets
- Tracking projects
- Collecting email addresses
- Sales reports
- Upload project data into your own CRM system

PRINT PROJECT INFORMATION

The [Print](#) button at the top of the project page will give you a clean, two page document.

WEEKLY NEWSLETTER

We send you a weekly e-mail every Monday morning. The report will list all of your new and updated commercial construction projects, from the previous seven days. Just click on the title of a report and it will send you to that project once you are logged in. These emails are a great way to track projects.

SET CALENDAR REMINDERS

On each project, you can enter a personal note with the option of selecting a reminder date. Your will see a list of all your follow-ups under [Calendar](#) in the side menu, and you will also receive an email reminder on the date the follow-up is due.

A man with short dark hair and a beard, wearing a blue and white plaid shirt, is seated at a desk. He is looking down at a smartphone held in his left hand while his right hand rests on a laptop keyboard. On the desk in front of him are several sheets of paper, likely architectural blueprints. The background is softly blurred, showing what appears to be an office setting. The entire image is overlaid with a semi-transparent blue and green gradient that transitions from a darker blue on the left to a lighter green on the right.

MAKING THE
MOST OUT OF
CONSTRUCT-A-LEAD
REPORTS

GETTING PRIVATE WORK

Every project is different – especially private jobs. With over 100,000 live projects in our database, it only makes sense that the projects would vary. You need to call on every project that you are interested in. You will also want to e-mail the contacts. We have an e-mail for every project. These are construction sales leads - call sheets that give you information you will need to bid on construction projects. Make sure to call on every contact and introduce yourself and your capabilities. You want to be their supplier or service provider of choice going forward. You may not get that project, but you want to make sure and get the next project. Ask your contact if they have any more projects in the pipeline. This could help you get on their bidding list. Tag every report that you want to call on and use the [Add Notes](#) feature to take notes on that project during the call.

Do not expect bid dates on all private projects. Some bids are straight forward – but very few. Many private projects are negotiated work – meaning the owner/developer selects the general contractor or uses their own general contractor. Contact the project lead immediately to find out how they will handle your product or service. We have seen up to 50% of private projects that are “negotiated” projects.

Sometimes the owner/developer is also the GC. More often than not, the developer is the contact (as well as the architect), that will hire the subs. Many times when the GC is chosen already they have their team in place. The GCs are awarded a contract based on the complete package they have submitted. On some projects not all sub work and materials go out to bid. They may bid sub work/ materials on what they do not have. It would be to your benefit to contact these projects early on so that they can bid on subsequent jobs. Negotiated projects never go to bid. Call on these projects as soon as possible. We estimate 40% to 60% of private projects are negotiated.

PLANS & SPECS

We do not provide plans and specs. Why? Because we feel that you should not have to pay for them. Some of our competitors have plans and specs and you will wind up paying more for that service. They also have plans and specs on some of the projects, but not all projects. Very often the plans and specs our competitors have are old and out dated. We highly recommend you get the most current plans and specs from the architect, general contractor, or owner/developer. Most plan owners do not want their plans available to the general public. The plan owners have their own websites where they store their plans and specs.

BEST PRACTICES

Every commercial construction project is different: some projects are in the early planning and some projects may only have one contact. Not every project will be right for you. Don't dwell on an individual project, make good use of your time and move on to the next project. There are different rules for different projects. However, all of our projects, with the exception of those that are already completed, are live leads for your business.

If we do not have an e-mail address you can usually go to the contacts website and fill out a contact form under a "Contact Us" tab.

Always ask a developer, GC, or architect (depending on who you work with) if they are working on any other projects or if they have any new projects coming up.

It is not a set protocol on who and how a project gets built with private work. Sometimes rules are bent. That's why we encourage you to call on every project that looks interesting and to let us help you use Construct-A-Lead to its fullest potential!

Give us a call at 855-874-1914 or email us info@construct-a-lead.com and let us help you win new business!

