

From Document Chaos to *Organized, High-Volume* Operations with Construction CRM

Background

MMC Inc. is a California-based construction firm founded in 1995, **completing 100–150 projects over nearly three decades**. With project timelines typically spanning 1–2 years and team size of 60 employees, MMC manages high volumes of documentation, coordination tasks, and long-running workflows across numerous teams.

Before adopting Zoho, documents such as Submittals, RFIs, and Change Orders were manually created in Word/PDF and shared via email. This created **challenges in document tracking, maintaining logs, onboarding new team members, and ensuring continuity on long-duration projects**.

Challenges



Inefficient Project Pipeline

Project intake, qualification, and stage progression happened across spreadsheets, emails, and PDFs—making it difficult to track status, responsibilities, and timelines.



Manual & Error-Prone Document Creation

Submittals, RFIs, and Change Orders were manually built for every project, slowing teams down and increasing version-control issues.



Lack of Real-Time Field Visibility

Daily reports were inconsistently submitted, causing delays in identifying job-site issues and limiting executive oversight.



Limited Accountability & Delay Tracking

There was no automated system for measuring contractual response times, creating compliance risks and limiting transparency.



How We Implemented Automation

01

We created a document management automation system using:

- Zoho Writer
- Zoho PDF Editor
- Zoho WorkDrive
- Custom Widgets inside CRM

Key capabilities delivered:

- ✓ Auto-generation of Submittals, RFIs, Change Orders, and Transmittals
- ✓ Standardized templates pre-filled with project, vendor, and spec data
- ✓ Version-controlled storage linked to each project

IMPACT

Document creation time dropped from **5 minutes to <30 seconds** per document.

02

Built a project pipeline automation with end-to-end project tracking

We configured a multi-stage project pipeline covering:

- Bid Intake
- Estimation
- Contracting
- Pre-Construction
- Construction
- Closeout

Configuration Highlights:

- ✓ Custom modules for Bids, RFIs, COs, Submittals, Vendors, Calls, and Daily Logs
- ✓ Linked records across all project stages
- ✓ Automated status updates based on activity

IMPACT

Created a unified system of record covering **150+ projects over 30 years.**



03

Built a dedicated workflow for field teams with daily field logs module

- Daily logs submitted via mobile
- Weather auto-captured via API
- Worker activity, equipment usage, and issues logged
- Photos uploaded directly from job site
- Supervisor approval workflow

IMPACT

Shifted the company from **weekly to daily reporting**, increasing oversight and reducing disputes.

04

Added a delay tracking & compliance workflow — Contractual Delay Measurement

We configured:

- Time-stamped workflows
- Delay thresholds based on contract requirements
- Automated reports showing total delays, delay types, and responsible parties

IMPACT

Created **reports and analytics** for client accountability and measuring project performance to reduce delays.

05

Created a centralized knowledge hub & digitized operational SOPs

- Embedded process guidance into CRM modules
- Simplified handoffs for long-duration projects

IMPACT

Significantly improved CRM adoption and standardization amongst Project Managers.



Results & KPIs

Since system go-live, MMC has processed:

750

Submittals Created

142

Submittal Delays
Logged

124

RFIs Submitted

83

RFIs Answered

32

New Projects Added (16 Active)

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