

PE/VC-BACKED ENVIRONMENTAL MARKETS FIRM

Salesforce data model rebuilt and NetSuite connected at an environmental markets firm

12+

core Salesforce objects restructured

10+

hours a week of manual reconciliation removed

2-way

sync of accounts, orders and financials with NetSuite

THE PROBLEM

The firm ran an inherited Salesforce setup with a flawed data model, which made reports unreliable. NetSuite and Salesforce were not connected, so finance and pipeline data were reconciled by hand. Responding to a bid took weeks because staff gathered data from disconnected systems, which limited how many deals the firm could pursue.

WHAT WE DID

The original scope did not include bid response. Discovery showed it was the real constraint, so we refocused the engagement on it. We restructured more than 12 core objects to fix the data model, connected NetSuite and Salesforce with two-way sync of accounts, orders and financial data, deployed Agentforce Sales Coach for the sales team, and built an AI assistant that gathers bid data, analyzes pricing and drafts proposals.

RESULTS

- 1 Bid response cut from weeks to days.
- 2 More than 10 hours a week of manual reconciliation removed.
- 3 Reliable pipeline and revenue reporting across 12 core objects.

CLIENT

PE/VC-backed firm in environmental commodities and carbon markets

OUR ROLE

Salesforce rebuild, integration, Agentforce

SYSTEMS

Salesforce, Agentforce Sales Coach, NetSuite, Breadwinner

TIMELINE

2025

Discovery showed bid response, not the original scope item, was the constraint. The engagement was refocused on it.