

Commercial Manufacturing & Design Company

Project milestones and customer data visibility becomes a reality with Salesforce Sales Cloud.

Decentralized sales and project management processes required significant manual activity and lacked visibility and transparency throughout the project management cycle.

The Challenge

Disparate customer and project data storage systems make clear visibility into a full project lifecycle an impossibility.

This commercial manufacturer and designer was struggling to get a full picture of their customer database and of their end-to-end project road maps. With a very manual customer and opportunity data management process, there was a disconnect between sales, services, marketing, and executive functions, which provided a mediocre customer and employee experience.

Additionally, their account data was managed in Epicor ERP, but their field sales representatives were managing all their leads and opportunities using individual Excel spreadsheets and email. This made it very difficult to have an accurate view into each opportunity, creating a siloed and disconnected sales and project management process.

The Solution

Strategic planning session pinpoints the need for a single source of data truth and project management dashboards.

In order to prioritize organizational needs, West Monroe started by conducting a requirements gathering session with the leadership team. Through this discussion, it became clear that they needed a technology solution that would centralize

THE BOTTOM LINE

TRANSFORMING SALES, CUSTOMER, AND PROJECT MANAGEMENT



ROLLED OUT SOLUTION TO **80+ USERS** ACROSS THE ORGANIZATION



ELIMINATED DOZENS OF MANUAL PROCESSES IN EXCEL ACROSS MARKETING, SALES, PROJECT MANAGEMENT, AND EXECUTIVE REPORTING FUNCTIONS



SAVED PROJECT MANAGERS AND COORDINATORS **>5 HOURS EACH WEEK** BY ELIMINATING MANUAL TRACKING, CALCULATION, AND SCHEDULING EFFORTS

This national manufacturing and design company specializes in end-to-end interior transformation for commercial spaces.

both their customer and opportunity data, and provide real-time visibility into project milestones for project managers.

The organization selected Salesforce Sales Cloud as their Customer Relationship Management (CRM) tool, which, once implemented, became their single source of truth for customer, new account, and opportunity data. Project documentation was stored and managed at the opportunity level with Dropbox integration, while Epicor ERP integration via Dell Boomi kept projects in sync and provided visibility to associated quotes and orders. This eliminated the email and Excel-based sales process and provided a more streamlined method for sales and customer management.

West Monroe established an automated task and email notification system to alert the project managers to progressive project milestones based on calculated target dates. This evolved into a dashboard-driven solution, allowing project managers to access milestone data in real time.

The Impact

The entire sales, customer, and project management processes have transformed—becoming more efficient, productive, and visible to the organization.

Over 80 users across Sales, Project Management, Design, Customer Service, Marketing, and the Executive team have been onboarded to Sales Cloud. The entire organization now has a single source of truth for all customer interactions, providing visibility to key activities.

The new technology and project management process has eliminated dozens of manual processes in Excel across marketing, sales, project management, and executive reporting functions. Sales representatives can now track activities across each point of the sales cycle and this documentation supports a seamless hand-off to project management when beginning the build phase. Project managers and coordinators are saving over five hours each week due to the elimination of manual tracking, calculation, and scheduling efforts. This has freed them up to focus on executing major milestones and providing an up-leveled customer experience.

