

Salesforce Construction Kickstarter Package



From bids to builds—fast CRM rollout in 6–8 weeks.

Who We Are

We're Salesforce Consulting & MSP Partners with 10+ years of experience delivering industry-specific CRM solutions. For construction firms, we unify business development, project execution, and post-handover service on one low-code Salesforce platform.

Our Services

Solving These Common Construction Pain-Points

Chaotic bid pipelines

missed
deadlines & low
hit-rates T

Project hand-off gaps

warranty issues
slip through the
cracks

Manual RFIs & change orders

costly rework
& margin loss

Little visibility for subs & suppliers

endless emails
and calls

Our **Salesforce Construction Kickstarter Package** delivers a tailored CRM that tackles these challenges—fast, cost-effective, and scalable.

Why Construction Companies Need Salesforce

Construction businesses often struggle with:

- Disconnected systems between sales, bids, field crews, and accounting
- Manual bid management, change orders, and contract approvals
- Limited visibility into project, equipment, and subcontractor performance
- Complex compliance and documentation (safety, permits, COI)
- Disjointed client, partner, and subcontractor communications

What's Included for – **\$12,999**

Category	Inclusions
Salesforce Setup	Standard setup for Sales Cloud + Service Cloud (sales process and ticketing system)
Bid & Project Flow Setup	Configure Lead - Opportunity - Bid - Project pipeline with status stages
Field Service Setup	Enable Field Service Lightning with technician assignment, job status, and service appointment tracking
Change Order Management	2 Flows to manage contract change approvals and internal pricing adjustments
Partner Experience Cloud Portal	Deploy portal for subcontractors to submit bids, upload documents, and track project status
Custom Flows & Automation	- 5 Flows per Standard Object (e.g., Opportunity, Case, Work Order) - 7 Flows per Custom Object (e.g., Projects, Subcontractors, COI Tracker)
Custom Objects & Fields	20 Custom Objects, 50 Custom Fields per Object
Reports & Dashboard	10 Reports, 5 Dashboards focused on: Pipeline, Compliance, Subcontractor Performance
Data Import	Migration of up to 5000 records (Leads, Accounts, Contacts, Bids, Projects)
Training & Enablement	Role-based sessions for Estimators, Project Managers, Field Technicians, and Subcontractors

Optional Add-ons (Quote-Based)

- Procore Integration for project management sync
- DocuSign / Adobe Sign for contracts & change order approvals
- Advanced CPQ Setup for job quoting and material estimation
- BIM / PlanGrid Integration for document control & blueprint sync
- Agentforce, autonomous bid/no-bid analysis, proposal drafting, schedule-risk alerts
- Data Cloud & Einstein – Predictive margin & schedule-variance dashboards

Why Construction Firms Choose Us



Construction Focus

Deep knowledge of bids, RFIs, change orders & field ops



Integration-Ready

SAP, Oracle, Dynamics, Sage 300 CRE



Win More Bids

Real-time pipeline insights improve hit-rate & backlog planning



Project & Warranty Alignment

Seamless hand-off from BD to PM to Service



Quick Turnaround

Go-live in 4–6 weeks with low-code configurability

Bonus We go beyond launch:



- 1 Week Free Hypercare Support
- Project Process Optimization Recommendations
- Admin Coaching & System Ownership Handoff

Ready to Transform Manufacturing Ops?

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