

The**Hunley**Group



SUCCESS STORIES

AEC (Architecture, Engineering & Construction)

A Pipeline Infrastructure Protection Solutions Provider Moves Away from Oracle



Sales Cloud



Account Engagement

Challenge

A prominent provider in pipeline infrastructure protection solutions encountered a significant hurdle with their antiquated CRM system. The complexities of their various business units, each requiring unique strategies for customer engagement, necessitated a flexible solution to streamline their sales operations.

Solution

Hunley executed the following solution:

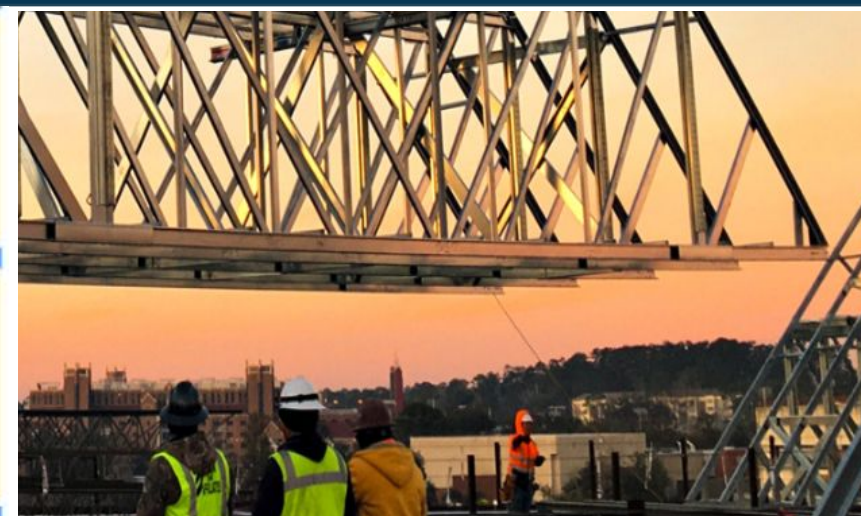
- Implemented Sales Cloud and Account Engagement.
- Integrated with multiple systems, including ERP and resource management, for multiple business units with diverse go-to-market strategies.

Results

They achieved the following improvements:

- Successful implementation of Sales Cloud and Account Engagement.
- Transition to Salesforce from Oracle.
- Integration with their ERP and resource management systems across business units.

Construction Management Firm Detects “Red” Project Early and Improves Client Testimonial Collection



Sales Cloud

Challenge

A prominent construction management firm that specializes in commercial, institutional, and residential projects nationwide, was looking to improve on several issues, including:

- Identifying "red" projects early.
- Obtaining client testimonials.

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Solution

Hunley executed the following solution:

- Implemented a sophisticated workflow, within Sales Cloud, to automatically send surveys to key project contacts at various stages.
- Integrated the Get Feedback platform into Sales Cloud to streamline the process of survey distribution and collection.

Results

With the implementation of Sales Cloud and integration with Get Feedback, the following results were achieved:

- Early detection of red projects.
- Improved client testimonial collection.
- More visibility into client satisfaction levels.

Hunley group is very thorough and structured, but is able to be flexible when required by client in regard to schedule, scope and implementation.

-Salesforce Admin

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Top Asphalt Maintenance Firm Drops Cosential and Transforms Their Sales Pipeline



Sales Cloud

Challenge

A top asphalt and pavement maintenance firm sought to replace its outdated CRM, Cosential, in order to enhance sales pipeline management.

Additionally, they aimed to streamline change order processes and track bids, with multiple general contractors.

Solution

Hunley's solution rollout included:

- Implementation of Sales Cloud integrated with Vista CRM and Sharepoint for improved functionality.
- Deployment of Inbox and mobile capabilities to empower field personnel with easy access to information.

Results

They achieved the following results:

- Increased efficiency within their sales pipeline management.
- Boosted bid tracking productivity.

“Our experience with The Hunley Group has been top-notch. We worked with their team through our initial Salesforce implementation and were so pleased we decided to partner with them for continued support.”

- Business Intelligence Process Manager

Electrical and Data Contractor: Revenue Forecasting and Workforce Planning



Service Cloud



CRM Analytics

Challenge

A leading electrical and data communications contractor faced these challenges:

- The ability to determine expected revenue month over month.
- Identifying required workforce.

Solution

Hunley devised the following solution:

- Implemented "Curve" for each project, aggregating data seamlessly.
- Employed CRM Analytics for intuitive presentation and analysis.

Results

With the implementation of Service Cloud and CRMA solutions, they observed the following results:

- Streamlined revenue forecasting month over month.
- Enhanced workforce planning accuracy.
- Increased efficiency in resource allocation.

"THG is THE leader in the A.E.C. salesforce world and should be recognized as such. I would trust no one else with managing the goals and visions of our salesforce journey."

–Salesforce Admin

Specialty Contractor Drives Success with Salesforce Sales Cloud Quick Start Solution



Sales Cloud

Challenge

A specialty contractor company faced challenges due to:

- Legacy Pipedrive CRM's limited functionality for effectively capturing project data.
- Managing interactions with contacts and generating forecasting reports.
- CTO faced difficulties understanding data in both Pipedrive, and in various spreadsheets among the sales team.

Solution

Hunley implemented the following solution:

- Quick Start solution with customization to core objects including Accounts, Contacts, and Opportunities.
- Implemented Project Account Roles on Opportunities for enhanced project management.
- Competitor tracking on Opportunities to provide insight into who they are bidding against.
- Einstein Activity Capture configuration for tracking interactions.

Results

Hunley migrated data from Pipedrive into Salesforce Sales Cloud and accomplished following results:

- Improved understanding of data among the team, due to the user-friendly interface.
- Saved time gathering data for forecasting and analytics, attributed to the structured nature of Salesforce.
- Purchased 5 additional licenses post Go-Live.

Optimizing Projects and Contractor Engagement: Environmental and Engineering Services Firm



Experience Cloud

Challenge

An environmental and engineering services company was unable to take a proof of concept and turn it into a robust system. They were seeking a partner to come in and advise them on a solution to improve their business processes.

The**Hunley**Group

Solution

The Hunley Group executed the following solution:

- Implemented a structured system for managing payments and work submissions.
- Established a contractor community portal for streamlined login and work claiming.

Results

The following results were achieved:

- Project complexities are now easily managed.
- Structured payment and work submission system implemented.
- Contractor engagement streamlined via community portal.

“Hunley Group brought an extraordinary level of professionalism to this work—both in managing the project as well as deep technical insight. We had some unusual needs and requirements that the Hunley team managed smoothly and with great grace.” –Director of Applications

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– Salesforce Admin

Commercial Concrete Contractor Let's Go of Whiteboards and Spreadsheets



Experience Cloud



Field Service

Challenge

A commercial concrete contractor was managing their dumpster rental business unit with whiteboards and spreadsheets. They were also running into the following issues:

- Dispatch used TickTick for work orders, resulting in inconsistencies.
- Dispatch would text drivers about work orders which caused inefficiencies.

Solution

The Hunley Group partnered with them to implement the following solution:

- Switched to Salesforce FSL Gantt Chart for organizing work orders, increasing weekly completions.
- Implemented FSL Mobile app, freeing phone lines for business growth.
- Replaced paper and whiteboards with screen flows and quick actions.
- Introduced employee communities for timecard tracking and communication.

Results

They were able to achieve the following results:

- Enhanced job dispatching with job and resource tracking.
- Improved time tracking accuracy with accessible history.
- Real-time communication on job site activities via mobile app.
- Increased dispatcher productivity, allowing focus on revenue generation.

"Field Service Lightning gave us full insights into our business, and saved us immensely on staffing costs."

- COO

Transitioning an Architecture Firm from Spreadsheets to Streamlined Processes



Sales Cloud



Account Engagement

Challenge

A distinguished architecture and engineering firm utilized spreadsheets for tracking Opportunities. Organized into studios, each with its own projects, they were aiming to enhance collaboration across teams.

Solution

Hunley, through a thorough assessment of their operational objectives, identified the need for a company-wide centralized database to optimize data management. Subsequently, Hunley also implemented Sales Cloud and Account Engagement to effectively realize their objectives.

Results

- Improved task tracking and organization via streamlined processes.
- Revamped task management for improved productivity, implementing better tracking mechanisms and workflows.

“The Hunley Group grasped our industry, service offering, and Salesforce goals from the start. They asked the right questions and broke down the onboarding process into manageable tasks. Any deviation from the original timeline and budget was discussed early.”

– Salesforce Admin

Upgrading Visibility and Decision-Making with a Leading Construction Company



Sales Cloud

Challenge

A leading construction company struggled with the absence of Go/No-Go assessments at various stage-gates in pursuits, along with intricate approval requirements.

Solution

By consolidating multiple data points into a single interface, The Hunley Group partnered with them to streamline visibility with Sales Cloud.

Results

The following results were achieved and observed:

- Timely notifications and escalations led to more proactive responses from the team.
- Enhanced project performance overall.

Design-Build and Construction Company Eliminates Manual Reporting Tasks with Sales Cloud Quickstart



Sales Cloud

Challenge

A Design-Build and Construction Management company faced challenges due to:

- Microsoft Dynamics' limited functionality for capturing project data, managing interactions with contacts, and generating forecasting reports.
- Vice President was manually extracting data into Excel every 3-4 months to track and report on company performance.

The**Hunley**Group

Solution

Hunley planned and presented the following solution:

- Quick Start solution with customization to core objects including Accounts, Contacts, and Opportunities.
- Ability to track Project Account Roles on Opportunities.
- Einstein Activity Capture configuration for tracking interactions.
- Reports and Dashboard designed to analyze activity metrics and KPIs to drive informed decision-making.

Results

Hunley migrated data from Dynamics into Salesforce Sales Cloud and they witnessed the following results:

- Substantial time saving achieved by eliminating manual reporting tasks for Vice President.
- Comprehensive 360 view into project life cycle from the early stages of a project through completion.

Improving Third-Party Account Tracking for a Leading Food Service Equipment Company



Sales Cloud

Challenge

A leading food service equipment company faced challenges in managing their sales process, primarily relying on emails and spreadsheets.

Solution

The Hunley Group suggested and implemented Sales Cloud with data migration, facilitating streamlined sales processes. Hunley also established four distinct customized sales workflows.

Results

With Sales Cloud, they were able to achieve efficient tracking of multiple third-party accounts within their project teams.

“Really positive overall. Data loading is in work and we are making sure we’re testing and feeling confident with this. Feeling really good about what we have built so far.” – Company President

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– Company President

Meticulously Monitoring the Bid Process for a Specialized Contractor/Subcontractor



Sales Cloud

Challenge

A specialized contractor/subcontractor with expertise spanning multiple trades sought to enhance their project cost tracking capabilities. Their goal was to meticulously monitor the entire bid process, from initial invitation to bid, to post-bid follow-up.

Solution

Hunley supported their goal of improving project cost tracking by implementing Sales Cloud and refining processes for better efficiency and monitoring. This solution also helped to ensure accountability across the bid lifecycle.

Results

The following results were achieved:

- Unified project records, enhancing bid-related data tracking.
- Improved bid lifecycle tracking throughout all phases.

Solving Drywall & Insulation Contractor Obstacles with Invitation-to-Bid and Go/No-Go Decisions



Sales Cloud

Challenge

A drywall and insulation contractor found themselves grappling with the management of a significant volume of invitations-to-bid, coupled with the task of navigating the go/no-go decision-making process.

Additionally, they encountered the challenge of effectively coordinating estimation processes amidst this high-demand workload.

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Solution

Hunley planned and presented a Sales Cloud implementation with a custom package, designed for construction contractors, that addressed their specific challenges.

Results

With their innovative solution and Hunley’s custom package, they are now able to seamlessly:

- Manage the invitation-to-bid process from start to finish.
- Navigate go/no-go decisions with greater precision.
- Coordinate the estimation process more efficiently.

Improved Pipeline Visibility in Construction and General Contractor Firm



Sales Cloud



Account Engagement

Challenge

A construction and general contractor firm was running into the following challenges:

- Lack of pipeline visibility which led to projects slipping through the cracks.
- One person, the Chief Estimator, was tracking and making all the decisions on leads from iSqFt.

Solution

Hunley proposed an integration from iSqFt to Salesforce, and introduced lead scoring on iSqFt to prioritize leads efficiently.

Hunley also implemented dashboards with customizable filters by business unit for targeted analysis.

Results

Through Hunley's solution they achieved the following improvements:

- Enhanced pipeline visibility, preventing projects from being overlooked.
- Decentralized lead decision-making, relieving the burden on the Chief Estimator.
- Customizable dashboards by business unit allowed for more targeted analysis and informed decision-making.

Overcoming Challenges and Simplifying Operations in Marine Construction



Sales Cloud

Challenge

A marine construction firm, was facing challenges:

- Divergent focus among offices.
- Transitioning away from labor-intensive spreadsheet systems.
- Need for a comprehensive view of opportunities from the perspective of multiple decision-makers.

Solution

Hunley planned and presented the following solution:

- Implementation of a relational structure enabling comprehensive viewing of opportunities and other relevant data.
- Development of a pipeline dashboard featuring filtering options by business unit, market type, and region.

Result

Through Hunley's solution they achieved the following improvements:

- Streamlined collaboration and decision-making across offices by providing a unified view of opportunities.
- Enhanced efficiency and decision-making accuracy through dashboards.

“The simplicity exceeded our expectations, we didn’t realize how simple it could be.”

-Construction Business Development Manager

Energy-Efficient Canadian Homebuilders' Journey to Digital Excellence with Field Service and Youreka



Field Service



Youreka

Challenge

A homebuilder focused on providing Canadians with energy-efficient homes and appliances, faced challenges due to:

- Limited MS Bookings functions for dispatching resources for audits.
- Disjointed communication between back office and assessors about appointments and status changes.
- Inconsistent form completion for Canadian government reporting.

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Solution

Hunley planned and presented the following solution:

- Converted a custom object into Salesforce Field Service objects.
- Introduced Youreka for form completion and expense reporting.
- Used Service Resources for skills tracking and Service Territory Members to reduce travel.
- Enhanced the screening process to gather vital appointment information like language barriers and safety concerns.

Result

Hunley implemented Salesforce Field Service and Youreka into the existing Salesforce Org. The following results were observed:

- Dispatchers now use a 360° Gantt Chart view, reducing travel time to under 60 minutes.
- Appointment booking has improved from 15 minutes to 5.
- Assessors process about 500 appointments weekly and 2,000 since Go Live using Youreka forms, speeding up installation actions.
- The QA team reviews forms more efficiently, enhancing data accuracy and processing speed.
- Improved communication and streamlined rescheduling have enhanced response times and customer satisfaction.