



SUCCESS STORIES

AEC (Architecture, Engineering & Construction)

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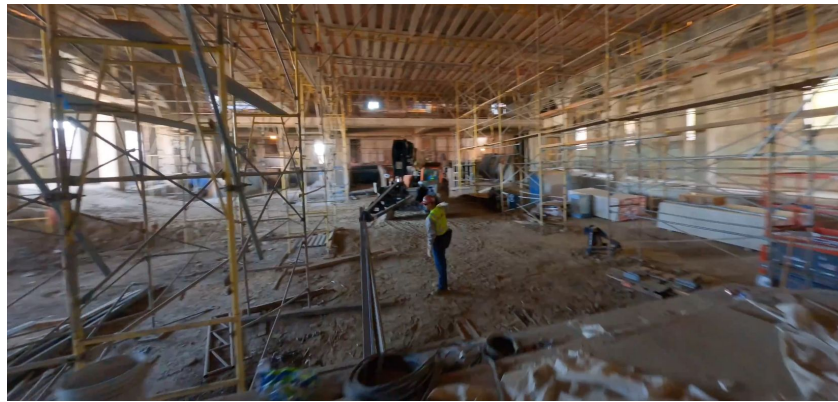
**Internal
Salesforce
use only**





General Contractor Success Stories

General Contractors and Construction Management companies typically manage the overall construction project, which generally includes managing subcontractors. Think of these companies as professional services with a twist. They are most likely to be a Sales Cloud play for Salesforce.



Rinse, Repeat, Close: 3-Week Deal Turnaround for a QuickStart in Commercial Construction



Agentforce
Sales

Challenge

Solution

Results

[ProWest Constructors](#), a Commercial & Residential Construction company **didn't have a CRM** and was managing all opportunities, contacts, and **project details manually in spreadsheets**. With long sales cycles and complex projects, it was difficult to track leads, account roles, and competition.

Hunley **will deliver a Sales Cloud QuickStart** in four weeks to give ProWest a practical way to manage sales more efficiently:

- **Accounts & Contacts:** Track key project stakeholders
- **Opportunities (Pursuits):** Manage milestones and sectors
- **Project Roles:** See who's involved on each project
- **Competition Tracking:** Record competitors and bid outcomes
- **Outlook & Dashboards:** Sync email/meetings and visualize pipeline

Once implemented, ProWest will have a **single source of truth** for pursuits, partners, and bid data. Teams will spend less time on spreadsheets, and leadership will gain clear visibility into pipeline and activity.

ACV \$5,000

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

– Matt Bergtraum, Salesforce Admin

Turner

Building the Future

Upgrading Visibility and Decision-Making with a Leading Construction Company



Sales Cloud

Challenge

Turner, 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 Turner to help them 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.



Sales Cloud

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

Challenge

LR Costanzo, 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.



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.

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Results

Hunley migrated data from Dynamics into Salesforce Sales Cloud and LR Costanzo 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.

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Improved Pipeline Visibility in Construction and General Contractor Firm



Sales Cloud



Account Engagement

Challenge

Solution

Results

Monteith, 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.

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.

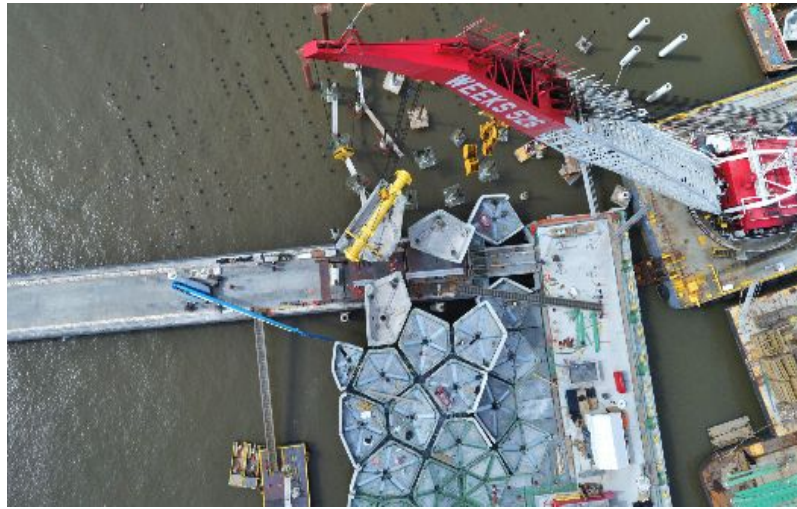
Through Hunley's solution Monteith achieved the following improvements:

- 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

Weeks, 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 Weeks 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.”

- Carol Shorbrook, Construction Business Development Manager





Specialty Contractor Success Stories

Commercial subcontractors are the “trades” who do the actual work on commercial construction projects (anything other than single-family homes). Electricians, plumbers, roofers, insulators, drywall, air conditioning specialists – there can be potentially a hundred different trades involved in a very large project.



Mechanical | Electrical | Plumbing

Modernizing Bid and Approval Management



Agentforce Sales

ACV: \$30,000K

Challenge

Solution

Looking Ahead

A leading **multi-trade construction firm** was struggling to manage RFPs, bids, and approvals spread across spreadsheets and email threads. Only one user actively engaged with the legacy CRM (Project Mark), leading to:

- **Disconnected data and duplicate opportunities** by trade.
- No central approval trail or audit visibility.
- **Unreliable reporting**, preventing leadership and PE investors from trusting pipeline forecasts.

These inefficiencies slowed sales cycles, increased risk, and limited the company's ability to scale through acquisitions.

Hunley planned and presented the following solution

- **Automated Bid & Approval Flows:** Standardized workflows with full audit tracking.
- **Unified Opportunity Management:** Consolidated multi-trade pipelines and eliminated duplicates.
- **Leadership Dashboards:** Delivered real-time visibility into pipeline, forecasts, and performance.
- **User Enablement:** Streamlined record layouts and quick-start dashboards to drive adoption.
- **Growth-Ready Architecture:** Configured to scale with acquisitions and evolving business needs

When this project is complete, we hope to see the following results:

- Unified spreadsheets and disconnected tools **into one Salesforce platform.**
- Delivered pipeline visibility and **reliable revenue forecasts** for leadership and PE backers.
- **Standardized bid-to-sale processes** across trades with audit trails and clear ownership.
- Built a scalable foundation to support future growth and acquisitions.

“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.”

– Phil Stephanik, Salesforce Admin



Electrical and Data Contractor: Revenue Forecasting and Workforce Planning



Service Cloud



CRM Analytics

Challenge

Morrow Meadows, 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.

ACV: \$150,000

Results

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

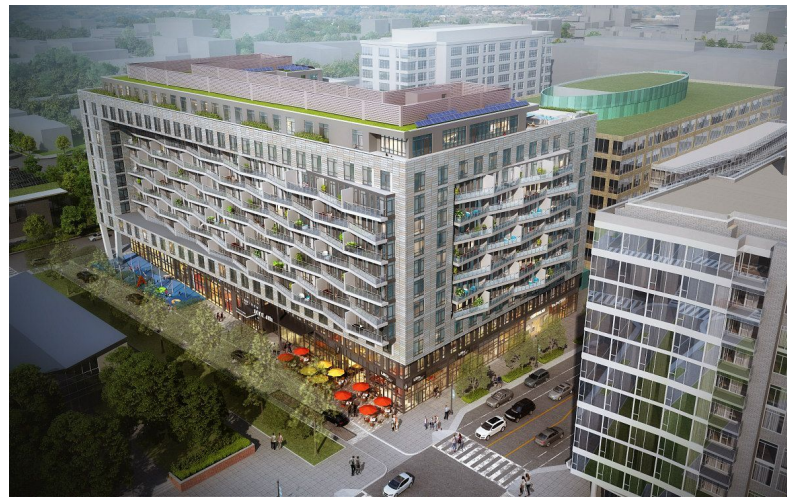
- Streamlined revenue forecasting month over month.
- Enhanced workforce planning accuracy.
- Increased efficiency in resource allocation.

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- Phil Stephanik, Salesforce Admin



Specialty Contractor Drives Success with Salesforce Sales Cloud Quick Start Solution



Sales Cloud

Challenge

Pillar Construction, 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 Pillar is bidding against.
- Einstein Activity Capture configuration for tracking interactions.

Results

Hunley migrated data from Pipedrive into Salesforce Sales Cloud and accomplished the 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.



Commercial Concrete Contractor Let's Go of Whiteboards and Spreadsheets



Experience Cloud



Field Service

Challenge

Solution

Results

Ground Thunder, 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.

The Hunley Group partnered with Ground Thunder 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.

ACV: \$56,000

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.”

- Jake Kimble, COO

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Sales Cloud

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

Challenge

Clark, 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 sales workflows, customized for Clark.

ACV: \$54,000

Results

With Sales Cloud, Clark was 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.” - Clark President



Meticulously Monitoring the Bid Process for a Specialized Contractor/Subcontractor



Sales Cloud

Challenge

Anning Johnson, a specialized contractor/subcontractor with expertise spanning multiple trades, sought to enhance their project cost tracking capabilities. Anning Johnson's 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

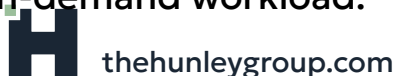


Sales Cloud

Challenge

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



Solution

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

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Results

With their innovative solution and Hunley's custom package, Blueline is 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.

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Architecture & Engineering Success Stories

Architects and engineers (the A and E in A-E-C), also known as “designers” or “consultants”, are professional service partners responsible for the design of construction projects. Architects design spaces, looks, and user experience; engineers focus on structure, systems, and functionality.



Optimizing Projects and Contractor Engagement: Environmental and Engineering Services Firm



Experience Cloud

Challenge

Tetra Tech, 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.

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.” - Emiko Guthe, Director of Applications



Sales Cloud



Account Engagement

Challenge

CANY, 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 CANY's 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.

ACV: \$74,000

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.”

- Jesse Lourey, Salesforce Admin

“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.”

– President