

## Custom Proposal Process Solution – built right into Salesforce — Provides Huge Efficiency Gains

Material Handling Manufacturer Maximizes their Salesforce Investment with Integrated Project Management Tool

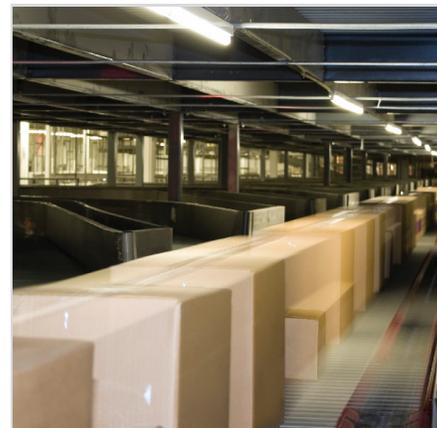
### Business Challenges

A provider of automated material handling solutions was not able to fully utilize Salesforce for both opportunity management and proposal processing. Once a sales opportunity was approved, it was handed over to the Proposal Delivery Group (within the company). Multiple team members (mainly engineers) were then assigned to work on different aspects of the proposal — often in parallel. Because all project management activities for the creation and processing of a proposal had to be managed outside of Salesforce, this created several issues:

1. Even though proposal information and milestone dates were tracked within the Salesforce Opportunity at a high level, all changes had to be entered manually.
2. All of the collaborative efforts for both the opportunity and the proposal were tracked within the Salesforce Opportunity, but this required manual tracking via spreadsheets.
3. There was no functionality to clone Project/Proposal templates to streamline recurring tasks and deliverables.
4. Tasks and Activities were not utilized in Salesforce; therefore, team members had to work from a project plan created within Microsoft Project, without the use of dependency and timeline (i.e. milestone dates) information. This required more manual tracking as well as regular status meetings specifically to communicate resource management.

In addition to a difficult and cumbersome user experience, these issues impacted the proposal team's efficiency. A lot of time was eaten up, which put them at a disadvantage with their competitors.

The company needed to rework their Salesforce implementation to support their very specific needs around the proposal process. As it stood, Salesforce worked well for maintaining, updating and sharing contact and status information related to an opportunity, contact or lead. However, they needed an integrated project management tool that would work seamlessly with Salesforce's opportunity management functionality.



Forced to do more with less, businesses are getting creative with their use of technology and blending it with business processes, workflows, and employee production programs, and are getting amazing results

...Forrester

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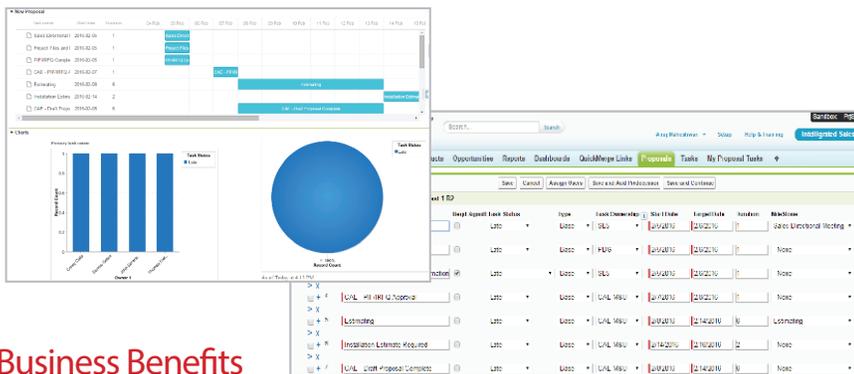
## Business Solution

The Keste solution offered a combination of online project management, project tracking, task lists, and other project management-related activities in Salesforce while linking projects to key Salesforce customer opportunity records.

Keste completely split the proposal process away from the Salesforce Opportunity object; a new Proposal object was added which has a direct lookup to the Opportunity object.

The company's sales organization continues to update and manage the Opportunity object, while proposal and project management functions resides on the separate Proposal object. Existing fields have been split between the two objects (Opportunities and Proposals), depending on where that information is needed.

In addition, a custom Task object was also incorporated to assist with proposal and project task plans. Proposal generation and task management now operate as one unified tool, removing the need for manual tracking and status meetings.



## Business Benefits

Keste's new integrated project management tool has improved efficiency by almost 25,000 hours per year, thanks to the elimination of manual processes and the teams' ability to collaborate within Salesforce and not switch back and forth between two systems. The highly skilled engineers can now focus on other critical, higher revenue-generating activities. The proposal management team is able to still produce results with less people, because they are able to manage and track all proposals as well as the overall project plan within Salesforce.

In addition, the company is able to fully maximize their investment in Salesforce, including taking advantage of mobile applications. A new set of reporting capabilities provides management the ability to see and deal with backlogs, allowing them to make status meetings much more strategic and productive.

In addition, by eliminating manual processes and automating their proposal process, proposal accuracy has increased as well as productivity (due to the number of proposals that can be generated in a given time period). The company is now agile enough compete head on with (and win against) others in their industry.

Contact: [solutions@Keste.com](mailto:solutions@Keste.com) or +1 877-537-8360 to learn more.  
Or, visit us online to see our entire solutions portfolio at: [www.keste.com](http://www.keste.com)

## CASE STUDY HIGHLIGHTS:

**CUSTOMER:** A provider of intelligent automated material handling solutions (i.e conveyor systems, sortation systems, palletizers, etc.)

**INDUSTRY:** Manufacturing

### BUSINESS CHALLENGES

Needed to customize their Salesforce instance to support their very specific needs around the proposal creation process. They felt that the out-of-the-box functionality to support their proposal process did not meet their very specific needs.

### KESTE SOLUTION

- Splitting the proposal process away from the opportunity and adding an additional Proposal object which will have a direct lookup to the opportunity.
- Adding a custom Task object, which is directly related to a proposal to track their Task process, Task hierarchy (Primary/Secondary), Successor/Predecessor workflows.
- Usability features were incorporated to assist with Proposal and Project Task Plans

### BUSINESS BENEFITS

Efficiency has improved by almost 25,000 hours per year, since the highly skilled engineers can now focus on other critical activities. In addition, the company's Proposal Management Team are able to

- Manage and track all proposals and project plans within Salesforce.
- Work with visual representation of proposal schedule.
- Clone Project/Proposal templates for recurring tasks and deliverables.
- Track predecessor and successor tasks of a proposal/project and flag tasks where the predecessor task is delayed.



# keste