

Smarter Bidding, Better Selling — Driving Adoption with an Intuitive Salesforce Experience

Context

One of the world's largest air conditioner manufacturers, struggled with low Salesforce adoption in its Equipment Sales bidding and specification process. Sales reps faced inefficiencies from complex navigation, fragmented document management, and limited pipeline visibility. They aimed to enhance Salesforce usability and streamline the bidding and specification process to drive adoption across sales teams.

“Implementing new workflows and tools helped streamline the bid management process and increased efficiency.”

-Sales Manager

Challenge

- Limited Salesforce functionality led to low engagement, with minimal adoption by sales teams for Bid & Spec processes.
- Inconsistent sales processes across offices created confusion and reduced efficiency for users.
- Cumbersome interface and workflows negatively impacted usability, discouraging regular use by Sales Reps.
- Fragmented document management and limited pipeline visibility made it harder for managers to track progress, while Sales Reps spent excessive time on administrative tasks.

Solution

- User journey mapping workshops to identify major opportunities for improvement
- Delivered a streamlined, intuitive Bid Management experience in Salesforce to simplify project and bidder tracking for users.
- Standardized sales workflows across offices to create a consistent, easy-to-follow experience for sales teams.
- Empowered managers with real-time visibility into team activities and pipeline through enhanced dashboards and reporting.
- Integrated SharePoint and automated workflows to reduce manual effort, minimize errors, and improve document accessibility.

Outcomes

- Centralized bid management consolidates all bid data, enhancing organization and accessibility.
- Streamlined workflows and improved visibility lead to more efficient bid handling, better coordination, and faster decision-making.
- Significant time and efficiency gains, saving each sales rep 3 hours per week and reducing project management time by 50%.
- It drives tangible business impact by adding 8,880 productive hours annually, generating \$3 million in additional sales, and increasing the win rate by 4%.

Country: USA
Industry: Manufacturing
Project Year: 2024-2025
Products: Salesforce Sales Cloud / SharePoint