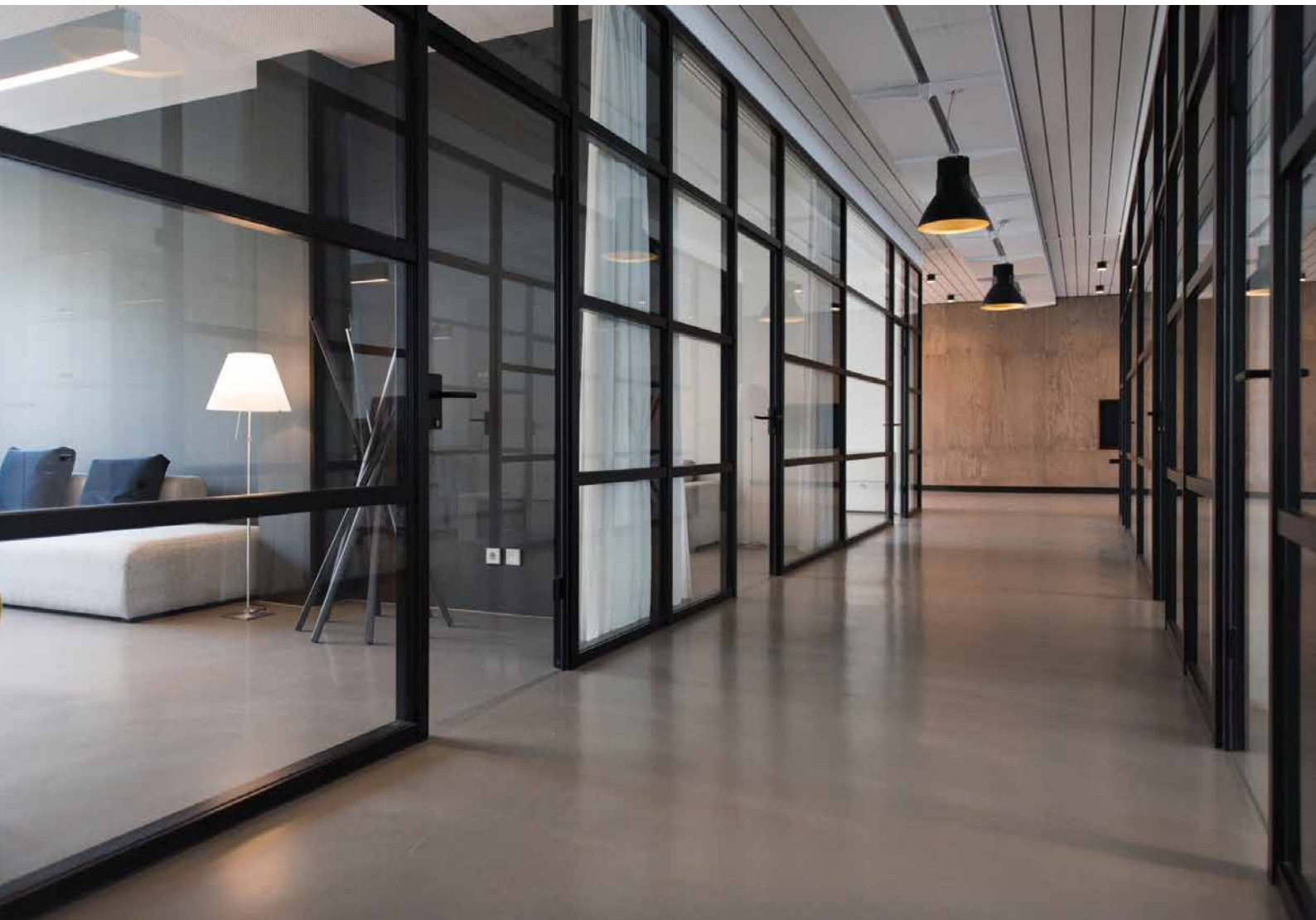




CLIMATECH

# Opportunity Pipeline and Tender Management with Salesforce





CLIMATECH

## When you count some of Australia's leading builders and developers among your valued customers, you must be doing something right. But that doesn't mean you can't improve.

### The Brief

Meet Climatech, one of Australia's leading mechanical services companies. Climatech and its family of businesses deliver heating, ventilation and air conditioning solutions on commercial building projects across Queensland, New South Wales and the ACT. Their goal? A perfectly climate-controlled environment that is so seamless, nobody even notices it.

Climatech's ability to deliver has allowed them to grow an enviable client list which sounds like a who's who of building and development in Australia. Westfield, Lend Lease, John Holland, Multiplex, Shape, Roberts Pizzarotti, Built, Richard Crookes and many other reputable names all count themselves as Climatech clients.

Until recently, Climatech was managing its opportunity pipeline and tenders using Microsoft Excel. But as they expanded, it was no longer enough. Without one source of truth, it was difficult for management to stay across key opportunities on the fly. The business development team tracked tenders – but there was a gap with the estimators, making it difficult for them to accurately cost project opportunities.

*Making investment decisions, assessing sales effectiveness or even forecasting future capacity was harder than it needed to be. There were even occasions when different parts of the business were inadvertently competing for the same project.*

What are we pitching for? With whom? And where are we likely to get engaged? These and many more questions were difficult and time consuming to answer. The time was right for Climatech to invest in Salesforce, with Carnac Group as their preferred Salesforce implementation partner.

### Our Approach

Here at Carnac Group, we love bringing agile methodology to our Salesforce projects. Using agile methodology means we can roll up our sleeves with our clients and create genuine solutions to problems in a short amount of time.

We created a small project team representing key parts of the Climatech business. Together we addressed the focus areas using agile methodology, including:

### What

Salesforce implementation including Salesforce Platform and Sales Cloud

### Key Requirements

- Opportunity pipeline management
- Tender management
- Account management and contact management
- Reporting and dashboards across the Climatech family of businesses

### Timeframe

6 weeks from kick-off to go-live

- **New business opportunities:** having clear, business-wide processes which capture and assess market intelligence and helping Climatech to make informed investment decisions
- **Opportunity management:** particularly given Climatech's collaboration with partners commences long before the job is even awarded

## Why Carnac?

**“As construction industry specialists, Carnac Group knew what we would need as a contractor. They anticipated our opportunities and challenges – and translated them into a solution which matched our business needs.”**

Martin Parker, Estimating Manager and Salesforce Project Lead, Climatech

- **Forecasting project delivery:** knowing what projects have been secured and what gaps remain in their pipeline. This also helps in knowing when they can price more competitively

## The Result

Climatech is now managing all its customer and supplier relationships and new business opportunities using Salesforce. Keeping track of tenders is much easier in Salesforce and collaboration on opportunities has significantly increased.

It has also delivered:

- Better consistency across sales teams
- Ability to forecast their pipeline of work secured and run what-if scenarios
- Better informed pricing decisions based on historical data points
- Improved resource allocation
- Increased transparency about opportunity costs across their divisions

## What Else?

Reducing manual processes and increasing efficiencies with Salesforce now means:

- Having one ‘source of truth’ for all contacts and opportunities and avoiding project-critical information being siloed across the group



- All market opportunities and invitations to tender from various sources (eg Aconex, Bidcontender, Estimate One, eTender) are funnelled into one central location, which is then coordinated for the entire group of businesses
- Transparently keeping track of key opportunities with alerts and reminders
- Automation of data for monthly board reports. Instead of scrambling for information, they wanted the relevant data to be pushed from Salesforce
- Objectively understanding the performance and workload of estimators and sales staff
- Accessing key tender information on mobile devices
- Creating a dashboard to track the tender process – from arrival on email or phone lead, through to completion. The dashboard also displays key tendering metrics, including volume tendered (in dollars), success rates, success rate by client. This means Climatech now has data-backed insights into which opportunities are more likely to be converted by sector, project type and even client. It also gives a single snapshot view of ALL the group’s tenders, with an ability to sort by company / division
- Using Salesforce as a forecasting tool means Climatech can track its cashflow projection



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**1300 315 526**

**[info@carnacgroup.com](mailto:info@carnacgroup.com)**

**[www.carnacgroup.com](http://www.carnacgroup.com)**

## **About Carnac Group**

Carnac Group is a certified Salesforce partner in Australia. We advise businesses on any aspect of their Salesforce journey including strategy development, Salesforce implementations and improvement projects. More than just tech experts, our clients value our business acumen and change management expertise to help them truly transform their business with Salesforce technology.