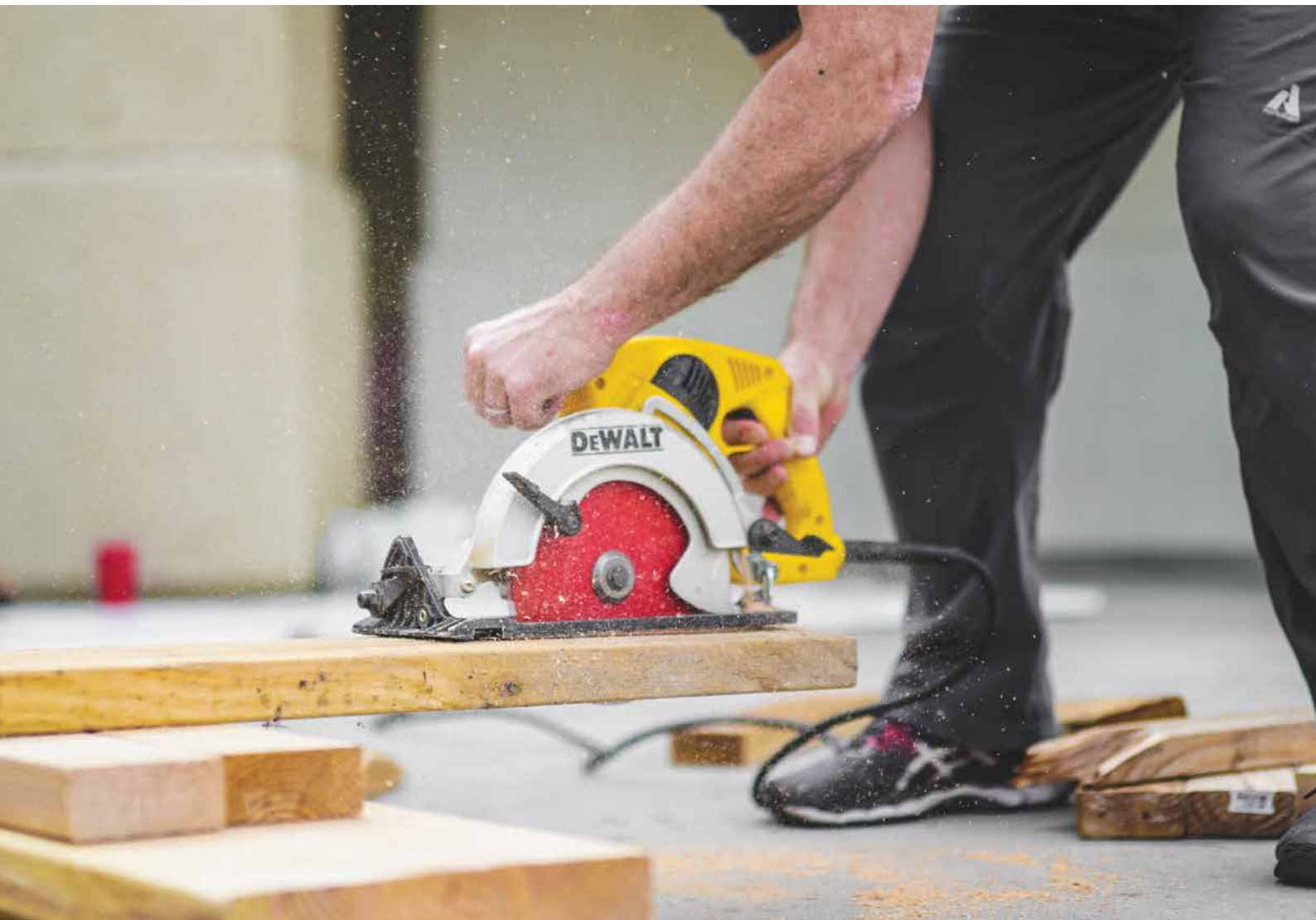




# Managing Subcontractor Networks with Salesforce



## When your business model relies on managing subcontractors to complete jobs on your clients' projects – wherever they are – you need intuitive systems which work.

With just nine employees, Direct Projects looks and feels like any other small business. But thanks to extensive subcontractor relationships across Sydney and New South Wales, their reach is far wider.

Direct Projects has been in operation since 2014. Since then it has established a successful track record, managing contracts with government entities like NSW Land and Housing Corporation and the Department of Education. It also contracts to large private customers like ASX-listed integrated services business, Spotless.

Direct Projects is responsible for ensuring building works and maintenance on their clients' properties are completed efficiently, effectively and safely. This includes both planned and unplanned works all over Sydney and New South Wales.

Whether it's a minor repair on a door frame or a refurbishment on an entire block of apartments, the challenge for a business like Direct Projects is deciding: who is the best subcontractor to engage for the job? And how do we make this a successful outcome for all parties involved?

Without their vast subcontractor network, fulfilling their commitments to clients would be impossible.

### The Brief

As a start-up, Direct Projects mostly ran their business using Microsoft Excel. But as their operations expanded, they needed something more sophisticated. Direct Projects chose Salesforce as their solution and Carnac Group as their Salesforce Implementation Partner.

For emergency repairs, they wanted to quickly identify and allocate the

best subcontractor for the job,

drawing on their skills,

location and availability. They

also needed to be able to quote for larger pieces of work, again relying heavily on their subcontractors to provide the right information at the right time.

### What

Salesforce implementation including Salesforce Platform and Sales Cloud

### Key Requirements

- Opportunity management
- Job management

### Appexchange Apps

- Conga for quoting
- Calendar Anything for diarising subcontractor allocation
- Sharinpix for capturing photos during site inspections

### Timeframe

5 weeks from kick-off to go-live

Once the project was underway, they also wanted to be able to manage the job, including subcontractor allocation, variations and onsite safety.



## Why Carnac?



**“Our consultant from Carnac Group is friendly, helpful and knowledgeable – I get immense value from the ideas he brings to take our business to the next level.”**

Ben McLeod, General Manager and Company Director, Direct Projects

## The Result

Direct Projects is now using Salesforce to manage all aspects of their business operations outside of finance. This includes:

- **Opportunity management:** from the moment Direct Projects is aware of a new opportunity through to engagement. This includes subcontractors conducting site inspections and inputting all information and site photos directly into Salesforce, managing all subcontractor quotes and issuing quotes for the entire project to their customers using the Conga add-on.
- **Job management:** once Direct Projects is engaged, they can allocate subcontractors to the job. This is irrespective of whether the job is an urgent repair or a project. Direct Projects also manages all project variations, safety inductions and safety incidents on Salesforce. Using the Calendar Anything add-on, Direct Projects can visualise which subcontractors are allocated to specific jobs and when. With colour coding, they can see at a glance which subcontractors have not yet completed their safety induction.

### Most valuable for Direct Projects

**“Salesforce was absolutely a strategic investment for our business and it’s a big selling point for our customers. They get peace of mind from the work we’ve done in Salesforce to ensure our logistics and schedules are sound, monitored and achievable.”**

Ben McLeod, General Manager and Company Director, Direct Projects





**Salesforce  
Consulting**



**Technology  
Strategy**



**Project  
Delivery**

**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.