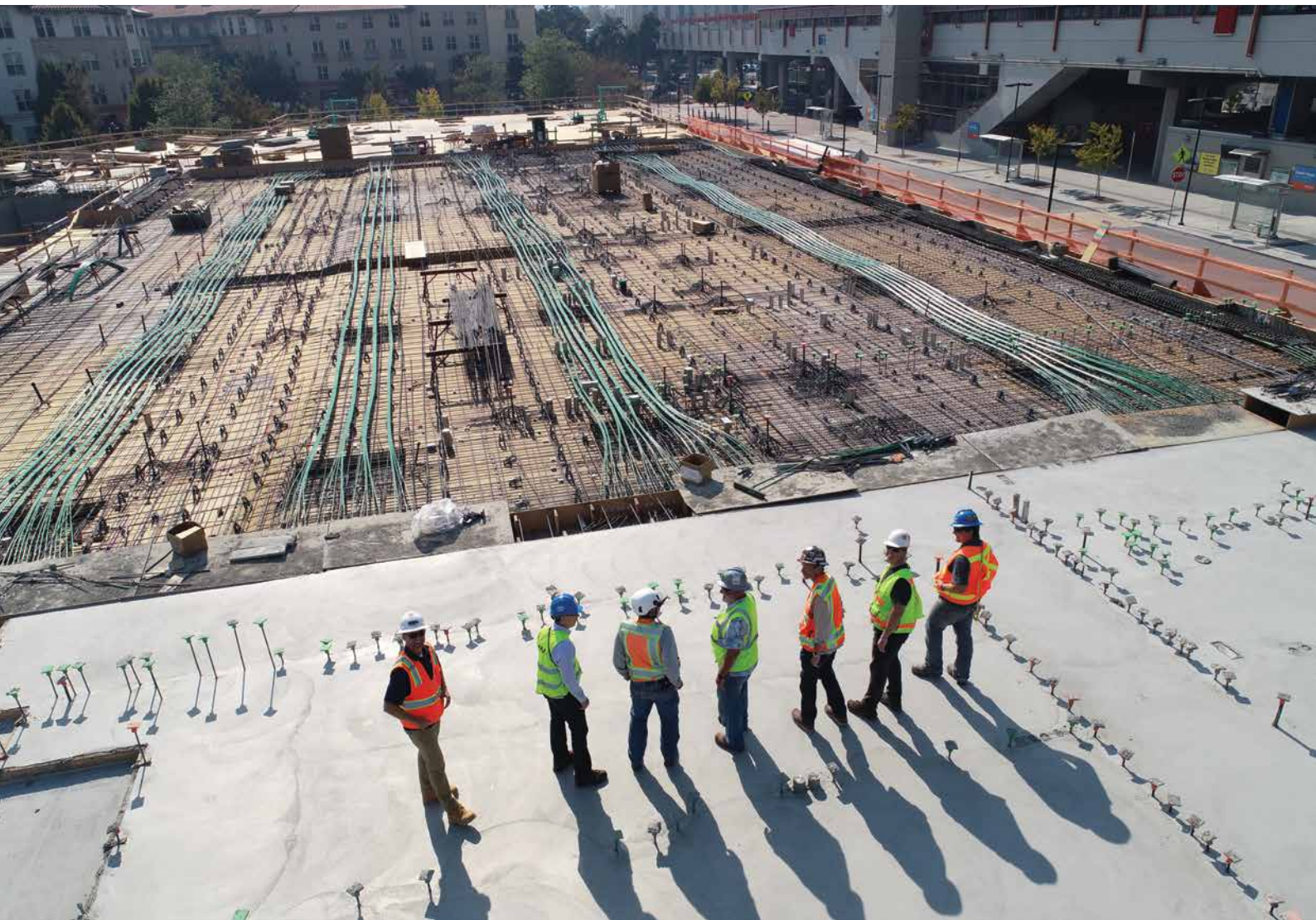


CITILINK PILING

SOLID FOUNDATION

Taking the Path Back to Salesforce



After completing an initial Salesforce CRM implementation, Citilink Piling knew they could be getting more. But they struggled to find the right partner.

Citilink Piling prides itself as a true partner providing structural foundations on residential, commercial and civil infrastructure projects. Their value proposition is a determined focus on innovation, quality and efficiency to help their customers deliver better project outcomes.

It's little surprise, then, that Citilink Piling chose Salesforce - the world's #1 CRM - to keep track of their valuable business relationships and opportunities.

But after implementing Salesforce, something was missing. They knew Salesforce enabled businesses to work smarter. Some had even experienced how powerful it could be elsewhere in the past. But at Citilink Piling, the big transformation they were hoping for was missing.

One of their concerns was that they hadn't found a partner who could help them explore possibilities as a construction business on the Salesforce platform. They were starting to wonder if they had made the right investment.

That's when Citilink Piling was introduced to Carnac Group.

The Brief

With a strong background consulting to the construction sector, Carnac Group was engaged by CitilinkPiling to get their Salesforce agenda back on track.

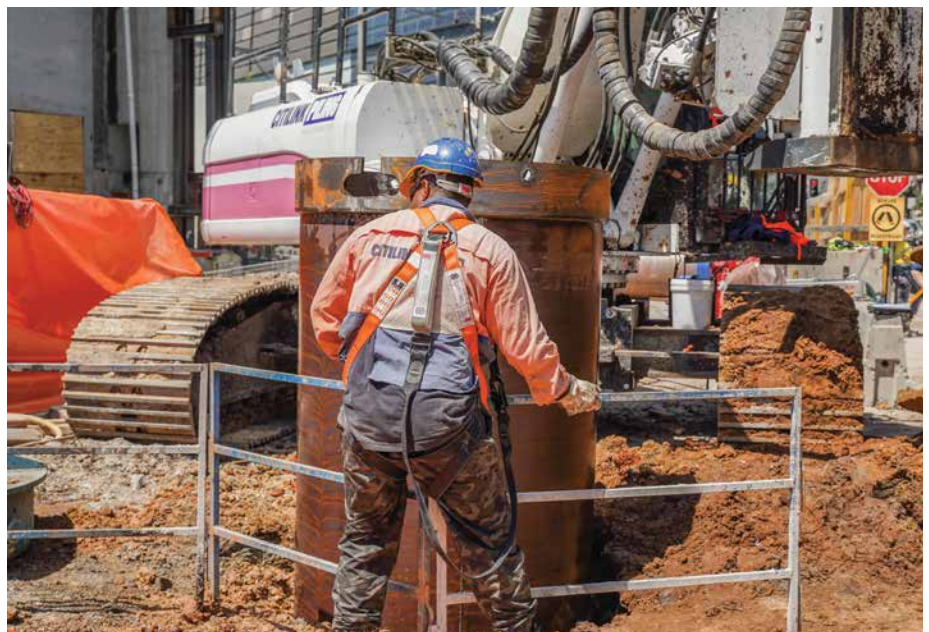
Citilink Piling's first requirement was for Carnac Group to complete a health check of their existing Salesforce environment and customise their Sales Cloud instance to help them identify, track and secure project engagements. They also wanted a roadmap so they could harness Salesforce across other aspects their business over the long term.

What

Salesforce Customer Relaunch and Continuous Improvement

Key Requirements

- Health check of existing Salesforce platform
- Tailoring Sales Cloud to a construction business
- Implementation of Plant and Equipment and Job Management solutions
- Establish a Salesforce roadmap



Why Carnac?



“Carnac Group have been great to work with, they have understood and delivered everything we were after. Carnac Group have gone above and beyond delivering the perfect solution for us.”

Pav Harutoonian, Construction Manager, Citilink Piling

A key pain point for them was how they allocated their plant, equipment and people to projects. After all, the longer their best assets sit idle, the bigger the hit in terms of lost revenue. Citilink Piling had looked at point solutions to help them address this challenge but were curious if it could be handled within Salesforce.

Our Approach

Starting our engagement with the health check, we found there was nothing technically wrong with what had been implemented. However, the main problem lay with its relevance: it just didn't go far enough to reflect opportunity

management for a construction subcontractor. By identifying some simple improvements, eg managing subcontractor bids, we could create a Sales Cloud environment which matched how Citilink Piling secures work.

We needed to address Citilink Piling's desire to harness the full value of their Salesforce investment over the long term. To do that, we discussed how other construction businesses use Salesforce and have improved its functionality through working with us. We introduced them to Carnac Group's own construction modules which we developed to fast track the rollout of industry-tailored solutions using the Salesforce platform.

This led to confirming the next priority in their Salesforce roadmap. Citilink Piling chose our Plant and Equipment and Job Management modules to help them manage their most valuable business assets. After comparing our products with construction tech point solutions on the market, Citilink Piling valued the flexibility offered on the Salesforce platform. Harnessing Salesforce and Carnac Group, Citilink Piling could customise the solution exactly to their preferences. Furthermore, they saw benefit in limiting their technology stack, as well as avoiding further system implementation and license costs.

The Result – Citilink Piling now uses Salesforce for:

Securing Project Work and Managing Opportunities

- Forecasting of opportunity revenue
- Budgeting for tendered jobs
- Managing subcontractor bids
- Allocating estimating resources
- Site inspections during estimating
- Capturing competitor intelligence

Automatic creation of a job once a project has been won

- Job Management
- Allocating employees to projects
- Visibility of original bid information to ensure jobs stay within agreed scope

- Calendar view of resources within Salesforce
- Pushing personalised daily notifications to employees so they know their next job location and schedule
- Handling variations to the job and sign off
- Reporting on actual versus budget costs once jobs are completed
- Tracking retention against a job, retention release plan and invoicing process

Plant and Equipment

- Recording and tracking each plant in Salesforce

- Management of plant and equipment allocation and transfer between sites
- Tablet-based plant prestart checklist, resulting in a simple, auditable process
- Better performance reporting by tracking budgets and actuals of materials
- Tracking plant service information, generating service reports and next service dates
- Maintaining critical stock levels of spare parts



**Salesforce
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Strategy**



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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.