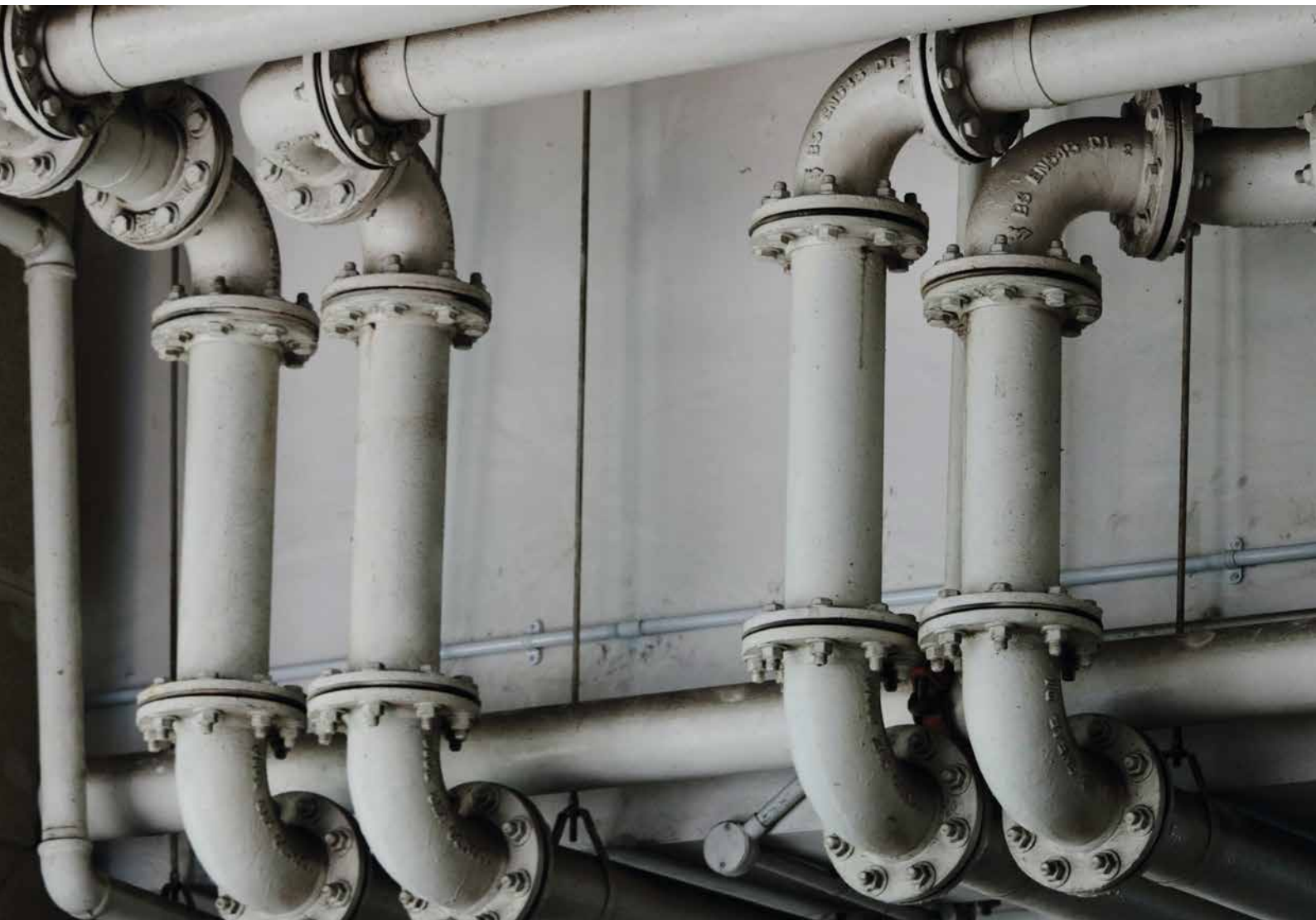




Scaling with Salesforce





Basic, affordable tools are often the default choice of start-ups. But are they still the right tool as they scale? Here's Planet Plumbing's story on making the move to Salesforce.

Like any business in construction, Planet Plumbing needs processes and tools to help them manage tenders and project estimations. Early on, they used a combination of basic, familiar tools to get the job done. They used Microsoft Excel to capture data and Office 365 for task management.

But what started out as a humble, one-man business is now a broad-based services company employing 250+ people across four offices. These days, various teams across two states contribute to securing a sizeable pipeline of projects. The original tools were stretched beyond their capability and cracks were beginning to emerge.

The Brief

As Planet Plumbing expanded to become Planet Group of Companies, they began to outgrow the huge Excel spreadsheet managing all their sales data. From tender and bid management to estimates and reports, the entire history of Planet Plumbing was stored in this all-seeing spreadsheet. And it became impossible to keep up to date. Likewise, using Office 365 for task assignment became a major limitation as more employees joined.



Planet Plumbing came to Carnac Group with 3 key pain points that they wanted to address by implementing Salesforce:

Managing Data: All bidding and estimating data were recorded in one Excel spreadsheet. This ended up costing more time and energy than initially expected, and countered the costs saved on using a basic solution. Recording estimates back into the spreadsheet was taking almost as long as the estimations themselves. Furthermore, any minor slip-ups in data entry had the potential to skew the whole spreadsheet and impact important business decisions.

Data Visibility: All the data was there in Excel, but not all of it was relevant or appropriate to share with the entire business. Executives became responsible for manually

What

Salesforce implementation with Sales Cloud

Key Requirements

- Opportunity and pipeline management
- Tender bid management
- Account management
- Reporting and dashboards

Timeframe

12 weeks

filtering and reporting information to those who needed it. This was frustrating for both executives, who saw it as wasted time, and the bidding and estimating teams that were unnecessarily waiting for task-critical data to be made available.

Scalability of Processes: Planet Plumbing's systems were struggling to scale to the geographical expansion they were undertaking. They had taken on strategic work in other areas, but still had to run operations through the Excel spreadsheet in Sydney, creating a 3-step process just to access the relevant data in other locations.

Our Approach

Planet Plumbing had already seen various Salesforce demos, kick starting their interest in an implementation. But, after introducing them to Carnac Group's customised construction configuration and modules, they were convinced that Salesforce could fit their business perfectly. Carnac Group went straight on-site to get a better understanding of what processes were already in place and their requirements, before showing them how this could all be mapped to Salesforce.

Why Carnac?

“From the moment we had our first briefing, these guys have been fantastic. Nothing has been a problem and they have held our hand throughout the whole process. They have done a brilliant job for us and we would have no problem recommending them to any business, they are awesome!”

Anthony Alafaci, Managing Director, Planet Plumbing

Throughout the implementation, our teams knew that good communication and collaboration were key to making this project a success. Carnac Group was able to bring industry knowledge to the table, incorporating best practices we'd seen work elsewhere, while Planet Plumbing made sure their key people and teams were open to sharing how they work. Checking-in and re-evaluating with the Planet team helped them to feel confident that everything was on track and that their needs were always at the heart of the project.

Our Result

Implementing Salesforce has helped Planet Plumbing take the grind out of their day-to-day operations and gives them the tools fit for a business of their size and scale today. They now have confidence in their processes and data and can continue to grow with them for many years to come. The Excel spreadsheet was retired, and Salesforce now saves them time, energy, and money with:

- Opportunity, tender and bid management
- Automating key processes
 - Data entry and analysis
 - Generating reports and spreadsheets
 - Assigning work
- Estimating, using their customised forecasting model
- Greater data visibility across the business
- Scalable solution to match business growth





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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.