

Building The Foundations For Success

Revolutionize the Quote Process for
My Pool & Patio





Laying the Groundwork for Process Integration

For over 30 years, My Pool & Patio, a division of Apex Design, has been delivering top-tier landscape and hardscape construction services. As the company expanded, they recognized the need for a more efficient system to manage both their sales pipeline and post-sales construction projects.

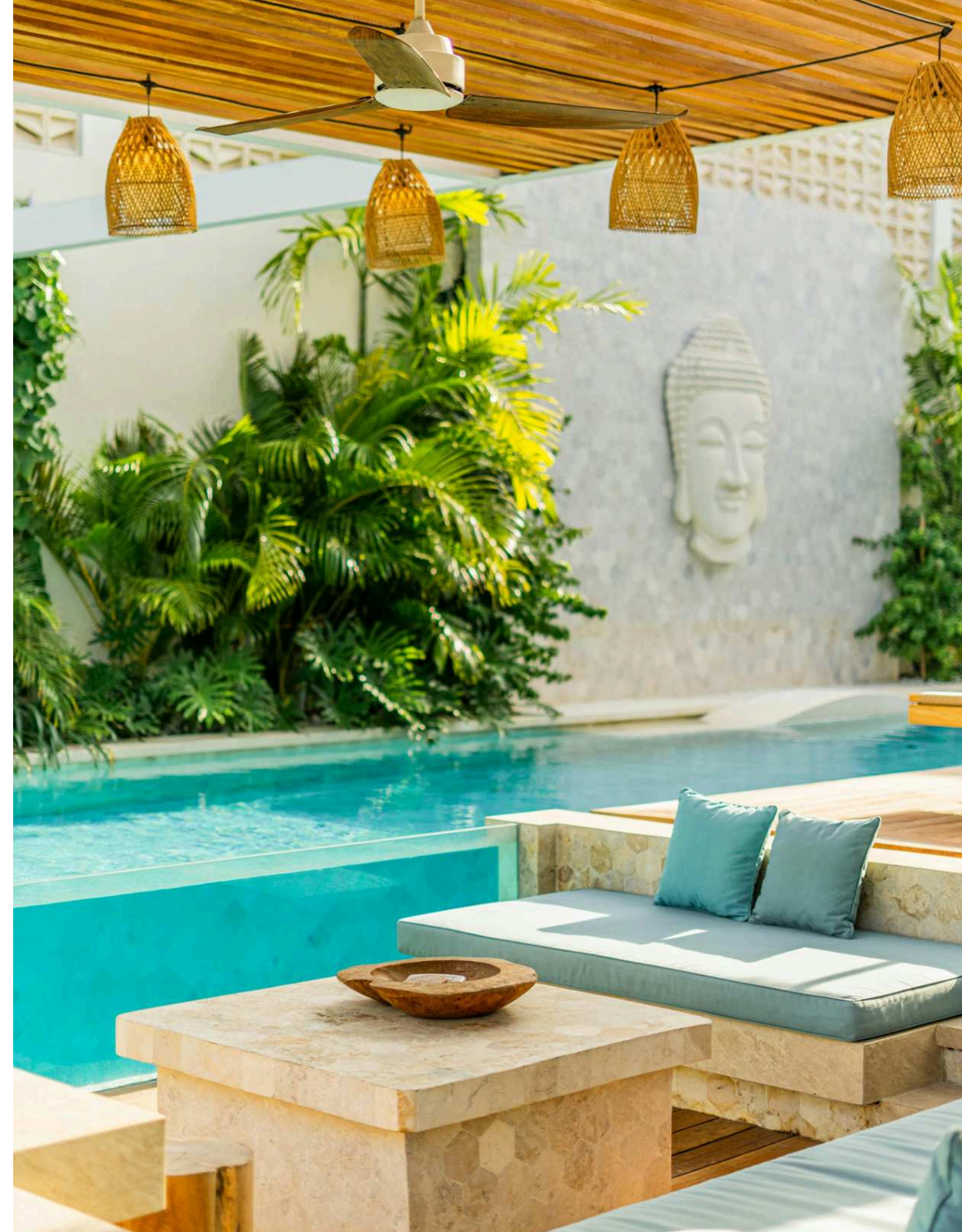
Their current process relied heavily on manual data entry, resulting in inefficiencies and missed opportunities for business growth. To address this, they partnered with DTC Force to implement a comprehensive Salesforce solution aimed at transforming their sales, quoting, and project management processes.

Blueprint for Change

Implementation of Salesforce Sales Cloud and CPQ

DTC Force began by configuring Salesforce Sales Cloud, enabling My Pool & Patio to streamline lead management and account tracking. Custom fields were created to capture crucial customer data, allowing the team to better understand their clients' needs.

The implementation of Salesforce CPQ (Configure, Price, Quote) further revolutionized their quoting process. DTC built and customized a product catalog with over 2,000 SKUs, integrating pricing rules and product bundles. This ensured that the team could quickly generate accurate, tailored quotes based on the specific requirements of residential and commercial clients.



Building Relationships With Enhanced Customer Experiences

Recognizing the importance of client communication, DTC Force also implemented **Salesforce Experience Cloud**. This provided a customer-facing portal where clients could view and interact with their quotes in real-time. Through this portal, customers had the option to add or remove features, with pricing automatically reflected in the quote. This not only improved transparency but also empowered clients to take control of their projects, enhancing overall satisfaction and engagement.



A photograph of a patio area with a wooden table and chairs, a large umbrella, and a swimming pool in the foreground. The patio is set against a reddish-brown wall with white window frames and shutters. The umbrella is white with a red polka-dot pattern and a fringe. The pool is in the foreground, reflecting the sky and the patio furniture.

Streamlining Project Management with Mission Control

Once a project was won, the next challenge was managing the implementation process. DTC Force integrated the Mission Control project management app into Salesforce, allowing My Pool & Patio to track project milestones, resources, and tasks in real-time.

The team could now assign resources, monitor task progress, and track time spent on various stages of the project, ensuring efficient resource allocation and timely project delivery. The system also provided visibility into project bottlenecks, enabling proactive management and quicker issue resolution.

An overhead view of two people floating in a swimming pool. The person on the left is on a yellow inflatable ring with a palm tree design and is holding a green inflatable ring. The person on the right is on a pink inflatable ring with a donut design. The water is clear and blue.

Salesforce Transformation That Lasts

Through DTC Force's Salesforce implementation, My Pool & Patio experienced significant improvements in their operational efficiency. The integration of Sales Cloud, CPQ, Experience Cloud, and Mission Control allowed the team to reduce manual errors, streamline their sales and quoting processes, and enhance project management capabilities.

The customer-facing portal transformed the client experience, while the automated workflows and resource management tools ensured that projects were completed on time and within budget. My Pool & Patio is now better equipped to scale their operations and continue delivering outstanding services to their clients.

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