

A Scalable Solution BUILT TO LAST

Implementing a Scalable Salesforce to
redefine construction management



Set to Redefine Construction Management

SiteWorks, a growing player in the construction and real estate services industry, faced operational inefficiencies in managing leads, accounts, and opportunities. With projects spread across various locations, their manual processes hindered the timely and accurate management of customer and vendor relationships, work orders, and project timelines.

The need for a centralized system to streamline sales, work order management, and client communication became apparent. Seeking a comprehensive CRM solution, SiteWorks engaged DTC Force to implement Salesforce and revolutionize their project management and operational workflow.

A Three-Phase Salesforce Transformation

Laying The Foundation In 2019

In 2019, SiteWorks engaged DTC Force for their initial Salesforce implementation. The primary challenge was managing fragmented lead, account, and opportunity data, along with disjointed processes for work orders. SiteWorks sought a unified platform to enhance their ability to capture and manage customer information and streamline work order processing.

DTC Force configured Salesforce to manage Leads, Accounts, and Opportunities, enabling SiteWorks to capture specific data such as client addresses, lead sources, and communication logs. This system allowed SiteWorks to track potential customers through the sales cycle and convert qualified leads into active accounts. The implementation also included an integrated Work Order Management System, allowing customers to submit work orders through a portal and enabling vendors to bid on those work orders through a vendor portal. This streamlined process reduced manual intervention and ensured timely communication with customers and vendors.



Scaling with Automation: The 2020 Enhancements

By 2020, SiteWorks' operations had expanded, and they required more sophisticated tools to manage their growing workload. The focus of this phase was on implementing additional automation and enhancing customer and vendor interactions. DTC Force implemented Salesforce Maps to enable geographic visualization of order addresses and vendor locations, which improved logistics planning and vendor management.

The 2020 project also included the integration of QuickBooks for automated invoicing. This integration allowed work orders created in Salesforce to be synced with QuickBooks as estimates, and invoices generated within QuickBooks were automatically pushed back to Salesforce. This enhanced the financial tracking capabilities of SiteWorks, reducing administrative burdens and improving financial transparency. The implementation of Preferred Vendor Search also allowed SiteWorks to maintain a list of preferred vendors and create custom reports for better vendor management.





Advanced Field Service Automation – The 2021 Transformation

In 2021, SiteWorks once again partnered with DTC Force, this time to implement Salesforce Field Service Lightning (FSL) to manage maintenance plans and enhance their work order processes. This phase introduced the automation of Work Order Creation based on scheduled maintenance plans, which were tied to specific assets. The system allowed SiteWorks to generate work orders automatically, set service appointments, and send reminders to both users and vendors.

The Dispatcher Console was another key feature of this phase. DTC Force set up a system to assign work orders to technicians based on their skill sets, location, and availability, optimizing the scheduling process. The dispatcher console provided a timeline view of appointments, allowing for efficient management of field service operations. This significantly improved SiteWorks' ability to manage field operations, ensuring that work orders were handled quickly and efficiently.

Real-Time Visibility Of Insights and Reporting

Across all three phases, DTC Force prioritized providing SiteWorks with enhanced reporting and analytics capabilities. By 2021, SiteWorks had access to custom Dashboards and Reports that provided real-time insights into key performance indicators such as work order completion times, vendor performance, and sales pipeline progression. These dashboards enabled data-driven decision-making and improved overall operational efficiency.

The integration of Twilio for SMS notifications allowed SiteWorks to keep customers and vendors informed about the status of their work orders in real-time, further enhancing communication and customer satisfaction.



Scalable Platform for Growth

Delivering efficiency, scalability and improved service delivery

To support data-driven decision-making, DTC Force developed custom dashboards and reports tailored to Principal Recovery Group's operations. These dashboards provided real-time insights into key metrics such as lead conversion rates, the status of ongoing opportunities, and the effectiveness of different lead sources. The system's flexibility allowed the management team to track performance and adjust strategies accordingly.

Looking ahead, the Salesforce platform implemented by DTC Force is scalable, ensuring that as Principal Recovery Group continues to grow, the system can be adapted to support additional processes, automation, and third-party integrations. With a robust CRM infrastructure in place, Principal Recovery Group is well-positioned to streamline operations further, enhance client engagement, and optimize their recovery processes for future success.

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