

## Salesforce Optimized for Proposals & Tracking



### Industry



Manufacturing & Sales of Air Movement and Specialized HVAC Systems for the Food Service Sector

### THE PROBLEM

The standard settings and functionality of Salesforce were providing little to no value for K-Vent, who were using the tool largely as a contact database.

They needed to get more from the product, such as the ability to track customer interactions, manage and distribute prospects and contacts amongst their staff, and automate sales processes to reduce time-consuming and repetitive tasks

### OUR SOLUTION

K-Vent now has a customized Salesforce system that is more integrated into their daily business processes.

StarrData was able to re-engineer Salesforce to assemble complex sales proposals, detailed tracking of the full sales cycle, and forecasting insights and automated reports generated from dynamic data to help improve business targets and goals month to month

### IMPROVED RESULTS

**K-Vent can now track customer acquisition stages and automates sales processes, which has increased staff efficiency and had a positive impact on sales**

- With daily integration into business processes and sales tracking, K-Vent's Salesforce customization reduces human error and keeps clients in contact with sales staff
- New forecasting tools and reports allows K-Vent to make business decisions backed by data to improve sales and prospect targeting-
- Sales proposal templates and automation allow the K-Vent team to quickly and easily generate unique and detailed sales proposals with all needed content stacked into one report for clients
- K-Vent has better control of the Salesforce tool, more business organization, and better sales results



### Customer Quote

*"StarrData and their developers helped us tremendously. They came in and talked with us and explained the ins and outs of Salesforce very clearly. We never got an answer that something couldn't be done - they were always able to come up with a solution."*

*With our Salesforce customization, we can keep track of our prospects and quote multiple products on a single proposal. It's given us an overview of where we are. We were so happy with StarrData's ability on this project that we signed on to have them as our ongoing Salesforce admin team."*



**David Hayes - Vice President at [K-Vent Inc.](#)**



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