

## The challenge

Bruntwood's existing CRM system had been developed sporadically over time and was originally a simple system which handled and stored emails to customers. Over the last 12 years, several additional features and functionality were bolted on, however this left Bruntwood with a system that was simply not user friendly and failed to meet the requirements of a fast expanding business.

Some of the key challenges were as follows:

- Pulling together the data for reporting was a manual and labour intensive task – this then resulted in data inaccuracy
- With 70+ users, the system was not supporting the diversity of requirements in a user friendly manner
- Sales were unable to gain a single-view of the customer leading to lack of cross selling and upselling across the business
- Due to the lack of visibility of sales activities, there were difficulties in ensuring the company was able to maximise agent productivity, retention and overall customer satisfaction
- Information silos were causing difficulties in cross business unit collaboration

## The solution

Bruntwood engaged with makepositive as they were highly recommended by Salesforce.

**makepositive** started working on a full Salesforce Sales Cloud implementation. The solution was selected because of its capabilities in managing the full end-to-end process of sales management and reporting.

The implementation allowed Bruntwood to manage their entire Serviced, Conventional Office Space and Retail Unit sales processes across multiple locations. It enabled them to:

- Capture leads submitted via their website plus those entered via an Agent Portal. These leads were then progressed seamlessly through to an opportunity on the Salesforce platform
- Manage their extensive property and suite portfolio, recording site viewings, feedback, maintenance work requests, locking out those suites that are occupied and creating detailed lease records against suites upon completion

Post Implementation support was also provided.

## The results

Bruntwood now have a single-view of their customers, including leases, suites, previous viewings and any other historical information. The Sales team are able to see all opportunities against a single customer, making cross-business unit collaboration a dream! The teams are making full use of Chatter against customers, opportunities, proposals and leases to ensure that all discussions can be referenced going forwards.

Now that all of Bruntwood's data is in one place in Salesforce, they are able to take advantage of the extensive reporting and dashboard capabilities to give a real-time view of their business and sales pipeline. This has eliminated the need for sales data to be stored in spreadsheets and email.

Users now have the independence to create and edit their reports themselves, allowing them to analyse the data that is important to them.

Managers now have transparency across their teams' sales activities.

Cross business unit collaboration has been greatly enhanced due to all teams being able to access the information and especially being able to discuss various customers and proposals over Chatter.

The time spent on manual data entry and updates has decreased, allowing users to focus on value-add activities.