



Pepco partners with construction-industry manufacturers to bring their products to market in the American southwest.



PROJECT OVERVIEW

Pepco Sales represents multiple manufacturers to supply products to the construction industry. The sales process is heavily relationship based. Success depends on understanding key influencers before the RFP process, and relationships between contractors, manufacturers and distributors.

Salesforce Products: Sales Cloud

Specializations: Custom objects & relationships | Flow-based automation

CHALLENGES

Pepco sales teams promote a variety of brands and manufacturers to key contacts. Reps need to understand complex brand relationships between builders, engineers, and contractors, then design targeted sales initiatives and goals:

What brands/manufacturers does the builder work with today?

Has that decision maker specified our product, or a competitor's product?

Based on what we know about the relationship, when should we target a conversion?

SOLUTIONS

Rosetree worked with key Pepco personnel to define an effective data model to store this information in Salesforce, using custom and junction objects to understand the complex relationships.

Time triggers and reports govern follow-up timing on multiple levels - builder size, job size, competitor contract end date, etc. - to form powerful layered insights into the decision making process.

Rosetree modified activity logging to enable reps to tie a logged call to multiple manufacturers.

RESULTS

With the activity data logged in Salesforce, sales reps can refer to filtered activity reports to prepare for monthly manufacturer review meetings.

"We have a monthly meeting with manufacturers and our sales teams to discuss current sales initiatives and opportunities.

Preparing for that meeting took 4 selling hours off the table every month for each meeting."

Charlie Parham
CEO, Pepco Sales & Marketing