



RoadSafe Traffic Systems, Inc. had a decentralized system of tracking and managing potential Future Projects. While RoadSafe's sales are tracked within Salesforce, Future Projects were tracked in a spreadsheet without a consistent way of tracking and reporting on this data.

RoadSafe needed a standardized way to track future projects, allowing them insight to potential revenue. The goal was to keep this information separate from Opportunity revenues, as Future Projects are very high-level and aren't a commitment from a client at a level that would warrant an Opportunity, thus leaving forecasting and Opportunity reporting unaffected. To track these Future Projects, RoadSafe needed a process that would allow the following:

- Flexible entry of data, allowing users to associate the Future Project with either an existing account or to enter in the name of a contractor without creating an account
- Entry of information from desktop or mobile
- Customized reporting and dashboards to allow RoadSafe to prepare for potential incoming business
- Ability to estimate an amount of expected revenue at either a record level or line item level

"I was very happy with the way the project was run – the project was completed on time and budget. We can now more accurately forecast future projects and provide impact information accurately to our sponsors."

Louis Angerame, Chief Information Officer

CUSTOMER

RoadSafe Traffic Systems, Inc
www.roadsafetraffic.com
Romeoville, IL

COMPANY PROFILE

Employees: 1,900
Industry: Construction

ABOUT

RoadSafe Traffic Systems is the nation's leading provider of comprehensive roadway safety services and products nationally. RoadSafe's highly skilled and dependable workforce strives to deliver quality products and services safely, on time and profitably to cultivate and sustain long-lasting customer relationships and to create value for its employees and stakeholders.

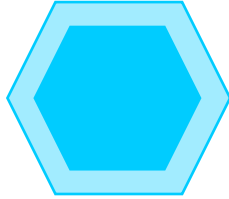
SOLUTION AT A GLANCE

Salesforce Sales Cloud
Custom Development

COMPONENTS

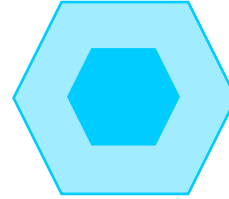
Future Project object
Mobile- and desktop-compatible
lightning component for data entry

A single system to manage all Future Projects internally without reliance on multiple spreadsheets throughout the organization.



20% ↑

accuracy in forecasting Future Projects



30% ↑

accuracy of Flash Reporting to Private Equity Company

Overall, the organization needed a single, flexible solution that allowed potential business to be tracked, reported on, and prepared for. Since RoadSafe employees are often on the road or out in the field without access to a computer, the ability to enter information quickly from mobile was imperative.

In response to these challenges, RoadSafe partnered with SMBHD to create a centralized process with a mobile solution. A solution that enhances their ability to monitor Future Projects, allowing high-level data input, with the flexibility to enter data on a more detailed level, where it could be accessed by all users instead of disparate spreadsheets being created by individuals throughout the company.

Leveraging custom objects and automations within Salesforce, as well as custom development, SMBHD was able to create a streamlined process for both desktop and mobile to meet RoadSafe's needs.

RESULTS

With the single-system to manage all Future Projects, RoadSafe is now able to better track and prepare for potential work that may be coming in.

The tool allows RoadSafe users to enter data as it comes in from contractors while out in the field or in the office. RoadSafe has streamlined the process of data entry, created a central repository for this information, and gained access to reporting on key KPIs they previously did not have reporting on.

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