



Streamlining the Intake Process for a Multinational HVAC Manufacturer

Overview:

Our client is a global HVAC, refrigeration, fire, and security solutions manufacturer headquartered in Palm Beach Gardens, Florida. The company is committed to being a technology leader and fostering a performance-driven culture. To this end, it leverages Salesforce to streamline key business processes. In addition, the company sought to enhance its global intake framework to boost operational excellence and efficiency.

Pain points:



Estimation & Visibility

Existing processes did not provide sufficient insight into active and upcoming initiatives.



Lack of Feasibility Analysis

Early-phase feasibility checks were missing, often leading to misaligning requirements and implementation timelines.



Prioritization of the Product Backlog

Budget, time, and resource constraints were unclear, making it challenging to prioritize new requests effectively.

Solutions:

Enhanced Intake Process

Revamped the intake request form to capture more precise, complete information at the onset.

Structured Assessment

Developed an in-depth intake evaluation template outlining business and technical requirements and value propositions.

Technical & Functional Reviews

Performed feasibility checks, examining system capabilities, licensing, data migration, and integration complexity.

Resource & Budget Estimation

Built a robust framework to gauge required sprints, team capacity, and financial investment.

Capability Mapping

Created Salesforce capability maps, offering transparency into existing functionalities and gaps for potential enhancements.

Benefits:



↓ Intake processing time by 25%

Reduced processing time, enabling quicker assessment and prioritization of requirements.



↑ Decision Making

Improved data visibility while safeguarding sensitive information.



Optimized Resource Planning

Enabled accurate forecasting of workforce and budget needs across multiple projects.



Enhanced Strategic Alignment

We ensured that Salesforce initiatives and other key projects were closely mapped to organizational goals.