

Modernizing Salesforce to support multidivision service business growth

RSM solutions elevate processes, visibility and operational alignment

KEY TAKEAWAYS

1. Our client faced challenges with fragmented systems and processes, and limited visibility.
2. RSM redesigned their Salesforce environment to enhance integration, transparency and scalability.
3. The company can now utilize Salesforce for stronger customer insights and faster decision making.

Our client is a multidivision commercial property services organization operating across several lines of business. Like many business and professional services firms, the company sells complex services that require close coordination between sales, estimation and operational teams.

Following an earlier transition to NetSuite with RSM US, the company sought to establish [Salesforce](#) as their customer

relationship management (CRM) platform while retaining [NetSuite](#) as their enterprise resource planning (ERP) system, aligning each platform to its intended role.

The company engaged RSM to help modernize Salesforce—not just as a stand-alone CRM solution, but as an operating platform aligned to a service-based business model.

The challenge: Inconsistency, disorganization and lack of insight create barriers to growth

Company leadership faced challenges that are common across multidivision service organizations, including:

Fragmented processes

- Each division operated with different workflows, making it difficult to establish a shared view of opportunities and performance across the organization.

Inefficient handoffs

- Sales and estimation teams relied heavily on manual communication to clarify scope details, leading to delays, rework and unclear ownership.

Limited pipeline visibility

- Leadership lacked insight into how long opportunities sat in each phase, weakening forecasting and making it difficult to identify bottlenecks.

Multisystem dependency

- Salesforce needed to capture scoping and sales information, while execution occurred in NetSuite and department-specific systems, requiring reliable integration rather than consolidation.

The solution: Building a streamlined Salesforce environment for scalable growth

RSM worked closely with company stakeholders to redesign their Salesforce environment with a focus on structure, transparency and scalability.

Creating a unified Salesforce framework

Our team began by consolidating the company's siloed workflows into a single Salesforce Sales Cloud framework. The solution established consistency across divisions while still honoring each division's unique requirements. By centralizing information, sales, estimation and leadership teams gained a shared source of truth.

Introducing guardrails for consistency and data quality

The transformation provided the company with a unified Salesforce foundation that established confidence in the platform and supported scalable growth. The company gained clearer visibility into their sales pipeline, a stronger forecasting process and the ability to collaborate effectively across multiple divisions. The redesigned operating model enabled sales, estimation and leadership teams to move away from manual, fragmented processes and toward a modern, insight-driven approach aligned with how service-based organizations operate.

Improving visibility with custom opportunity stage timing

To increase insight into deal velocity, RSM implemented an opportunity timer within Salesforce that tracked how long opportunities spent in each pipeline stage, accounting for business hours and holidays that reflect the company's real operating conditions. With measurable stage timing, company leadership gained clearer visibility into bottlenecks, workload distribution and realistic turnaround times—supporting better forecasting and expectation setting.

The new Salesforce system provides better visibility into the status of opportunities, enabling our sales team to identify and follow up on opportunities past their decision dates, which was not possible before.



Designing an integration approach aligned to service delivery

The company wanted Salesforce to be the source of truth for what work would be delivered and how long it would take, while continuing to use NetSuite and other systems for operational execution.

RSM designed an integration approach in which, once opportunities were closed-won, Salesforce sent the relevant opportunity data to NetSuite to support downstream workflows. The solution emphasized visibility into integration failures and was structured to evolve from a one-directional flow to a more scalable, bidirectional model as needs matured.

[Boomi](#) was identified as the recommended integration platform in this scenario, recognizing the company's need for flexibility without overcustomizing Salesforce.

Outcomes: A trusted operating environment that aligns with business processes and goals

Through their work with RSM, the company is now leveraging Salesforce as a scalable platform for stronger customer insights and faster decisions aligned to how the business operates. The organization gained:

- Stronger collaboration between sales and estimation
- More consistent and complete opportunity data
- Clearer insight into deal timelines and bottlenecks
- Improved forecasting and planning inputs
- A scalable foundation supporting future growth and integration needs

The challenges our client faced are not unique. Many business and professional services organizations struggle to scale Salesforce in environments where services—not products—drive revenue and delivery.

This project illustrates how aligning Salesforce to service based processes, introducing structured guardrails and designing pragmatic integration architectures can help organizations reduce friction, improve visibility and scale with confidence.

I know from experience these projects are very difficult and they can be very challenging. There's been a really good solid effort on the RSM side and I'm very satisfied.

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