



CapStone's existing system allowed them to track information for a single branch of their business, but was not customizable enough to accommodate their solar, generator, and roofing branches.

CapStone needed a customizable solution to accommodate the remaining branches of their business that would allow them to modify things as their business changes. CapStone also needed to be able to generate and send contracts to customers.

- **Building out a custom Salesforce org to fit the needs to their solar/generator/roofing branches**
- **Custom automations to help automate the process of creating a project from an Opportunity once it's Closed Won**
- **Custom document generation and e-signing process**

Overall, the organization needed a single, flexible solution to create and maintain their customer data and project information.

CUSTOMER

CapStone Solutions
www.capstone-sol.com
Redmond, WA

COMPANY PROFILE

Employees: 46
Industry: Telecommunications

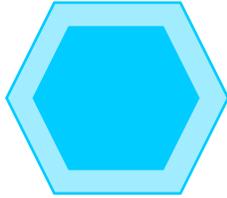
ABOUT

CapStone is a recognized leader in design and implementation of alternative energy solutions. They have been at the forefront of research and innovation since 2007 and have completed a wide range of wind, solar, hybrid and Smart Grid projects. They built their cross-industry expertise on powering wireless communication systems for Tier 1 carriers and they've performed projects ranging from basic project planning for small wind farms to highly complex conversions of off grid generators to full solar power.

SOLUTION AT A GLANCE

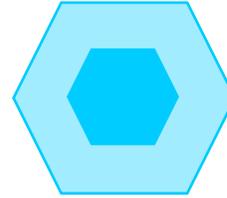
Salesforce Sales Cloud
DocuSign Integration

A customizable solution to allow tracking of projects, contract creation, and signature, in one platform.



30%

more project-specific KPI tracking



70%

less time to create new projects

We were able to provide a custom solution to handle all of their roofing sales/projects. This custom solution was built out to be scalable as their needs change and grow over time. Through automations, we've eliminated some of the time spent entering data across the platform, and created a system of notifications to make sure users are kept up-to-date on new opportunities, projects, etc. The custom solution we've built out in DocuSign allows information to be pulled in from Opportunities to generate formatted contracts, automatically assign recipients, and automate Opportunity Closure/Project Creation.

RESULTS

With a streamlined solution for their solar/generator/roofing projects, and a highly-automated process for document generation through an integration with DocuSign, CapStone is able to maintain their data in a single, adaptable system.

With an increase in customized data entry fields for projects, CapStone can now monitor and report on key project KPIs.

LEARN MORE: www.smbhd.com . 773.888.7900 . sales@smbhd.com