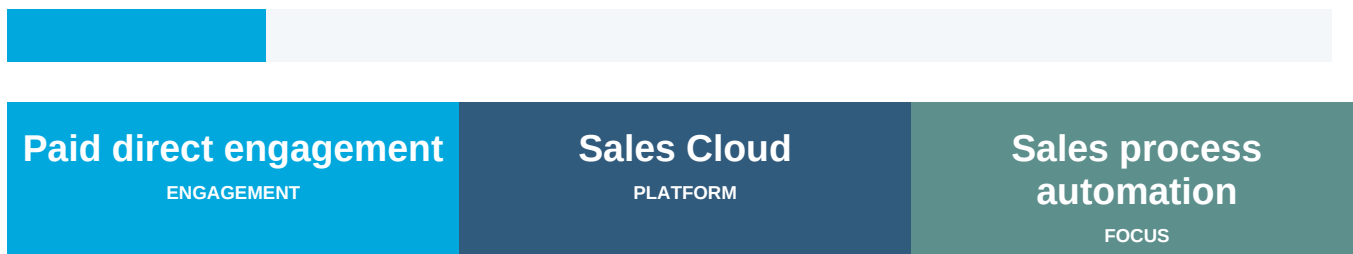


REPRESENTATIVE EXPERIENCE

Growing Home Services Company

Sales Cloud and DocuSign for customized offerings and document generation



Business challenge

A growing home services company needed a consistent way for service agents to work with clients, understand their needs, select customized products and services, and move opportunities efficiently from inquiry through quoting, proposal, and contract execution.

Prudence B2B approach

Prudence B2B implemented Salesforce Sales Cloud with customized lead and sales processes and integrated DocuSign to support the generation and management of quotes, proposals, contracts, and electronic-signature workflows.

Capabilities delivered

- Accounts, contacts, leads, and opportunity tracking
- Customized lead qualification and sales processes
- Product and service selection for client-specific offerings
- Quote, proposal, and contract generation
- DocuSign integration and electronic-signature workflows

Business value

- Created a more consistent agent-guided sales process
- Reduced manual document preparation and handoffs
- Improved visibility into clients, opportunities, and sales activity
- Enabled service agents to assemble tailored offerings and produce professional documents

Technology and delivery context

Sales Cloud | Sales process automation | DocuSign | Quotes, proposals, and contracts