



SALESFORCE CRM IMPLEMENTATION

From Scattered Leads to a Connected Sales Pipeline

Illustrative case study | Commercial Solar Installation

THE BUSINESS SCENARIO

A fictional mid-sized commercial solar installer, here called SunPeak Energy, serves property owners, warehouses, manufacturers and multi-site businesses. Its growing sales team needs one reliable place to manage enquiries, site assessments, proposals and follow-ups.

At a glance

Industry	Commercial solar and renewable-energy projects
CRM platform	Salesforce Sales Cloud (proposed solution)
Primary focus	Lead management, opportunity visibility, automation and reporting
Delivery approach	Discovery → configuration → migration → integration → testing → enablement

Executive summary

SunPeak Energy receives enquiries through its website, phone calls, partner referrals and campaign landing pages. Before the proposed Salesforce rollout, sales information is spread across spreadsheets, inboxes and individual notes. Follow-ups can be delayed, managers have limited pipeline visibility, and handoffs from qualification to site assessment are inconsistent.

Liyang IT Solution's proposed approach is to configure Salesforce around the company's real sales process: capture and route leads, qualify commercial opportunities, standardize assessment and proposal stages, automate reminders, and provide dashboards for sales leadership. The intended result is a more consistent process and a clearer view of every active opportunity.

01 | Business challenge

As SunPeak's commercial pipeline expands, informal processes become harder to maintain. A single project may involve a facilities manager, finance contact, property owner, technical assessor and external installer. Without shared records and clear ownership, the sales team risks losing context between conversations.

What was getting in the way?

- Lead details were recorded differently by each sales representative, making qualification and reporting inconsistent.
- Website enquiries and partner referrals were not always assigned to the right person quickly.
- Follow-up tasks depended on individual reminders and inbox searches.
- Opportunity stages did not consistently reflect the real steps from initial enquiry to site assessment, proposal and decision.
- Managers lacked a dependable, consolidated view of pipeline value, expected close dates and stalled deals.
- When an opportunity progressed, technical and operations teams could receive incomplete handover information.

Project objectives

Objective	How Salesforce would support it
Create a trusted customer record	Use consistent Accounts, Contacts, Leads and Opportunities with clear ownership.
Respond to new enquiries consistently	Route leads by agreed rules and create follow-up tasks.
Make project progress visible	Use opportunity stages aligned to the commercial solar sales journey.
Reduce avoidable admin	Automate routine reminders and selected status notifications.
Improve decision-making	Provide dashboards for lead sources, pipeline stages, ageing opportunities and forecast values.

Success measures to agree before launch

Rather than promise unverified results, the project would establish a baseline and track measures after launch: time from enquiry to first response, percentage of leads with an assigned owner, follow-up completion, opportunity-stage ageing, data completeness, forecast accuracy and user adoption.

DESIGN PRINCIPLE

Configure Salesforce to reflect the business process first. Automation and dashboards are most useful when the underlying stages, ownership rules and data definitions are agreed.

02 | Proposed Salesforce solution

The solution uses Salesforce Sales Cloud as the central workspace for prospect and sales-opportunity management. The final configuration would be confirmed during discovery and adjusted to fit SunPeak's licensing, security requirements and existing systems.

Core CRM structure

Salesforce component	Purpose in this scenario
Leads	Capture new enquiries and record source, project location, estimated system size and initial qualification.
Accounts & Contacts	Maintain business-level records and the people involved in a project or buying decision.
Opportunities	Track qualified projects, estimated value, expected close date, stage and next action.
Tasks & Events	Record calls, meetings, site assessments and proposal follow-ups.
Reports & Dashboards	Show lead volume, conversion by source, pipeline by stage, ageing deals and sales activity.
Salesforce Flow	Support agreed assignment, reminder and notification rules without unnecessary manual steps.

Example opportunity stages

New enquiry — Enquiry received; owner and first response task assigned.

Qualified — Commercial fit, decision contacts, location and initial project scope checked.

Site assessment — Assessment booked or completed; technical information captured.

Proposal in progress — System design and commercial proposal being prepared.

Proposal submitted — Proposal shared; next meeting or follow-up date recorded.

Negotiation / review — Questions, procurement, financing or internal approvals are being handled.

Closed won / closed lost — Outcome recorded with relevant close details and reason.

Website and external-system integration

Website forms could send enquiry data to Salesforce through an approved connector, API or integration service. Field mapping, consent language, spam controls, error logging and duplicate handling should be tested before launch. Any accounting, quoting, email-marketing or project-management connection should be scoped separately after reviewing the current tools and data flows.

DATA QUALITY & ACCESS

Use required fields only where they improve data quality, define duplicate-management rules, apply role-based access, and migrate only validated data that the business has approved.

03 | Automation and day-to-day workflow

The aim is not to automate every action. It is to make essential steps repeatable, reduce forgotten follow-ups and give each team member a clear next action.

Illustrative lead-to-proposal journey

1. Enquiry captured

A prospect submits a commercial solar enquiry on the website or is entered by a sales coordinator. Source and project details are recorded.

2. Lead assigned

Assignment rules route the lead by territory, business segment or another agreed criterion. The owner receives a notification and a follow-up task.

3. Qualification completed

The salesperson records business fit, estimated project scale, stakeholders, timeline and next step. Unqualified leads receive a consistent disposition reason.

4. Opportunity created

When the lead meets agreed criteria, it is converted and the opportunity is opened with an initial stage, value estimate and expected close date.

5. Site assessment scheduled

A task or event captures the appointment, owner and required preparation. Assessment findings are recorded against the opportunity.

6. Proposal followed up

When the proposal is marked as submitted, Salesforce prompts the owner to schedule the next follow-up and keeps the opportunity visible in pipeline reports.

7. Outcome recorded

The opportunity is closed won or lost with the relevant reason. A won deal can trigger a structured handover checklist for delivery teams.

Automation examples to configure and test

- Create a first-response task when a new lead is assigned.
- Notify the owner when a high-priority lead has no next activity recorded.
- Flag opportunities that have remained in a stage beyond an agreed threshold.
- Require a loss reason when an opportunity is closed lost.
- Notify the delivery coordinator when a deal is marked closed won and key handover fields are complete.

Reporting for sales leadership

A role-appropriate dashboard could include new leads by source, lead-to-opportunity conversion, open pipeline by stage, opportunities closing this month, deals without a next step, overdue activities and closed-lost reasons. Definitions and filters should be documented so managers interpret the metrics consistently.

04 | Delivery plan, outcomes and next steps

Suggested implementation plan

Phase	Key activities	Deliverable
1. Discover	Workshops, current-process review, field mapping, user roles and success measures.	Approved requirements and solution scope
2. Configure	Set up objects, fields, stages, page layouts, assignment rules, flows and dashboards.	Configured Salesforce sandbox
3. Prepare data	Clean, map, deduplicate and test-import approved leads, accounts, contacts and opportunities.	Validated migration results
4. Integrate & test	Connect agreed website forms or systems; test permissions, automations, errors and edge cases.	UAT sign-off and issue log
5. Launch & improve	Train users, launch in a controlled way, monitor adoption and refine based on feedback.	Go-live checklist and improvement backlog

Expected business benefits

If implemented and adopted successfully, this design is intended to give SunPeak a shared view of customer interactions, more consistent lead handling, clearer opportunity ownership, fewer missed follow-ups and better pipeline reporting. The actual impact should be assessed against the baseline measures agreed before implementation.

HOW SUCCESS WOULD BE MEASURED

Review the first 30, 60 and 90 days after launch. Compare response times, activity completion, data completeness, stage ageing, conversion rates and user adoption with the pre-launch baseline. Report actual results only after validating the data.

Why Liyan IT Solution

Liyan IT Solution provides CRM consulting, implementation, customization, workflow automation, data migration, integration and ongoing support. Our approach is business-focused: understand the process, configure the platform around real requirements, validate data and workflows, and support teams through adoption.

Planning a Salesforce project?

Let's discuss your sales process, lead sources, reporting needs and systems that need to connect with Salesforce.

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