



Prudence B2B

Transforming Industries, Empowering Communities



800 Park Offices Dr, Suite 3317
Research Triangle Park, NC 27709, USA



info@prudenceb2b.com



www.prudenceb2b.com

HOME SERVICES & SALES OPERATIONS

Growing Home Services Company

A growing home services company needed its service agents to work more effectively with clients, select customized combinations of products and services, and generate consistent quotes, proposals, and contracts through a structured sales process.

ENGAGEMENT

Paid Direct Prudence B2B Engagement

SECTOR

Home Services & Sales Operations

DELIVERY

Prudence B2B Salesforce Services

THE CHALLENGE

A growing home services company needed its service agents to work more effectively with clients, select customized combinations of products and services, and generate consistent quotes, proposals, and contracts through a structured sales process.

OUR APPROACH

Prudence B2B implemented Salesforce Sales Cloud with customized lead and opportunity processes, product and service selection capabilities, and DocuSign integration to support document generation and electronic-signature workflows.

SALESFORCE CAPABILITIES DELIVERED

- Accounts, contacts, leads, and opportunities configured for the company's sales model.
- Customized lead qualification and sales-stage processes.
- Client-specific selection of products and service offerings.
- Structured quote and proposal preparation workflows.
- DocuSign integration for proposals, quotes, contracts, and electronic signatures.
- Improved opportunity and customer-activity visibility for service agents.

BUSINESS VALUE

- Enabled agents to guide clients through customized product and service options.
- Created a consistent progression from inquiry through quote, proposal, and contract.
- Reduced manual document preparation and fragmented sales activities.
- Improved visibility into client interactions, opportunities, and commercial documents.

TECHNOLOGY & CAPABILITIES

Salesforce Sales Cloud | Customized Sales Processes | Product & Service Selection | Quote & Proposal Generation | DocuSign | Contract Workflows

Need focused Salesforce help? Prudence B2B offers assessments, improvement sprints, implementation support, and monthly managed services.



Prudence B2B, LLC
NC SOSID: 2395132
UEI: Q35NE2L3YPH7
CAGE: 9EV82



+1 (984) 400-5724



www.prudenceb2b.com



Salesforce
Consulting
Partner



ISO 27001
Certified



ISO 9001
Certified



Salesforce
AppExchange
Partner