



FOREFRONT DRIVES TRACEY ROAD CPQ PROJECT, STREAMLINES COMPLEX QUOTING AND ACCELERATES QUOTE-TO-CASH PROCESS

Overview

Tracey Road Equipment sells and leases construction equipment, construction vehicles, and semi-trailer trucks. It's a broad range of complicated products that makes quoting difficult. The company handled this process with spreadsheets, handwritten forms, emails, phone calls, a bulletin board, and sticky notes.

Challenge

Tracey Road attempted to transform its quoting with Salesforce CPQ, but issues with the original implementation partner left the project 75% complete. This meant that the company lacked full functionality for core sales capabilities.

Salesforce recommended ForeFront to finish the project because of our history of successful red account rescues, experience with heavy equipment dealers, and expertise integrating CPQ with dealer management systems (DMS).

Solution

To improve upon manual quoting processes, ForeFront wrote price rules and built a template to enable: Instant estimates with current product and service costs, discount-level choices, and auto-calculation of variable margin on individual items. Real-time inventory information pulled from the DMS ensures that vehicles are available and operational.

The customer quote is now a simple, bundled quote using product costs, options, add-ons, freight, and more. The previously hand-written Delivery Report and Quote Order were replaced with templates that automatically populate 90% of required information.



Salesforce Platform
Salesforce CRM
Salesforce CPQ



Implementation
Integration
procede


North American Construction
Equipment Market Estimated Worth:
\$36.6 Billion by 2027



Outcome

Tracey Road eliminated time-burning manual processes, optimized pre-sales quoting and ordering, and accelerated their quote-to-cash process. The result is faster quotes, higher margins, improved inventory visibility, and a significantly more efficient and successful sales process that drives revenue.

ForeFront has proven experience behind the wheel of complex Salesforce CPQ projects, and deep expertise in solving challenges for the automotive industry.

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