

## Restoring sales efficiency with an innovative solution

### Introduction

For sales teams, speed is more than a convenience. It is a competitive necessity. Nowhere is that more evident than in industries where high-volume transactions and complex inventories intersect. In these environments, even small delays in accessing data or generating quotes can ripple outward, slowing revenue generation and frustrating employees and customers alike.

That was precisely the challenge facing an aviation parts company when its Salesforce add-on tools began to hinder, rather than support, its sales operations. What followed was an engagement with RSM US LLP that demonstrated how targeted technology interventions—grounded in real user needs—can restore efficiency, improve user experience and unlock measurable business value. And while RSM's initial assessment and solution were delivered within a few weeks, restoring sales velocity almost immediately, the ensuing multiyear relationship that followed has focused on continuous improvement.

### Challenges

The company had recently transitioned from a legacy, homegrown system to a modern cloud-based platform built on Salesforce, supplemented by an industry-specific add-on. The move aimed to reduce costs and modernize operations.

But the organization's sales representatives found themselves constrained by a system that could not keep pace with their workflow. In one telling example, a salesperson remained on a customer call, waiting awkwardly while the system slowly loaded the requested information. Experiences like this were symptomatic of a broader issue. The add-on tool's performance limitations were directly affecting the company's ability to respond to customer requests in real time.

For a business handling thousands of parts—each with its own status, availability and potential substitutes—these delays were a barrier to growth.

### Understanding the pain points

At the start of the engagement, RSM focused on understanding how employees actually worked. Through on-site observation and direct conversations with users, RSM identified the add-on tool—not the Salesforce platform itself—as the core issue. The add-on tool created several critical pain points:

- **Slow search functionality:** Retrieving item information could take several minutes per query.
- **Limited data visibility:** Users struggled to access related information, such as alternative parts or refurbishment status.
- **Inefficient quoting workflows:** Generating quotes required multiple steps and manual workarounds.
- **Fragmented processes:** Employees still relied on external tools to track activities.

Over the course of a workday, these issues compounded. Sales representatives who handled high volumes of quotes were sometimes unable to reach even a fraction of their expected output.

RSM set out to improve the speed and usability of the company's platform without disrupting the broader system architecture, particularly since the add-on package itself could not be modified.



## How RSM helped

Rather than replace the existing platform, RSM took a more targeted approach. The team developed a set of custom components directly within Salesforce to complement—and effectively bypass—the limitations of the add-on tool. RSM's guiding principle was simple: deliver a faster, more intuitive experience for end users.

Key enhancements included:

- **Rapid search functionality:** The solution returned results in seconds rather than minutes.
- **Alternative part recommendations:** The system suggested options when exact matches were unavailable.
- **Bulk processing capabilities:** Users could select multiple parts and generate quotes simultaneously.
- **Real-time data access:** The solution integrated inventory status into search results.
- **Automated activity tracking:** The system automatically captured notes and actions, reducing the need for manual documentation.

The result was not a full system overhaul but a performance layer that dramatically improved how users interacted with the data.

## Results

The company saw immediate results. Sales representatives could search for parts more quickly, evaluate options and generate quotes without delay. With the new solution, the company's quote entry increased from fewer than 5% of quotes in Salesforce to more than 90%, restoring the team's ability to handle high volumes of requests and respond to customers without delay.

Equally important, the solution reduced administrative burden. Consolidating information into a single interface eliminated many of the steps that had previously slowed users down. Employees no longer had to navigate a system that they felt worked against them. Instead, they had tools that supported their workflow and enhanced their productivity.

While the immediate improvements were striking, the longer-term benefits were even more significant. By enabling faster access to data and more efficient workflows, the RSM-designed solution created a compounding effect. Sales representatives could handle more transactions, and faster quotes led to better customer experiences and a higher conversion rate. Furthermore, the system's real-time insights helped the company's leaders make more informed decisions.

## Continuous improvement

The engagement has since transitioned into a support and enhancement phase. Rather than large-scale transformations, the focus is on incremental improvements—fine-tuning features, addressing emerging needs and adapting to changing business requirements.

The experience reflects a broader reality of modern enterprise systems: they are never truly finished. Instead, they evolve alongside the organizations they support.

RSM's approach in this case highlighted an important lesson for organizations navigating digital transformation. Technology investments do not automatically translate into business value. In some cases, they can even create new inefficiencies.

In this case, rather than adopt a new system, RSM worked to align those systems with how people actually worked. By focusing on the user experience, embracing innovative solutions and merging technical knowledge and business insight, RSM helped turn an underperforming tool into a high-impact asset.

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