CASE STUDY:
How Beltline Analyzes Their 8-Figure Pipeline
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At Beltline Electric — an electrical contractor with two divisions across the state of Kentucky and one in Tennessee — understanding how pipeline will translate into revenue is key.

“Right now, we’ve got about an 80-million-dollar pipeline,” said Patrick Brumley, business development manager at the firm. “That looks great, but if 90 percent of our pipeline is education opportunities, and we historically only win one out of 10 opportunities in that sector, then we need to work on getting a better mix.”

To properly understand their pipeline mix, as well as what types of opportunities they’re most likely to win, Beltline uses Cosential — the client relationship management (CRM) solution purpose built for architecture, engineering and construction.

“It’s my job to interpret our marketing and business development data,” Patrick said. “That’s a big part of why I started using Cosential — to get all our data in one place, so I can run the reports I need to understand our sales process.”

Prior to implementing Cosential, Patrick used a structured query language (SQL) database to store and analyze sales data ... but the reporting proved problematic.

“If I wanted to pull a report on Tennessee Valley Authority, for example, I might find four different customer records — one for ‘Tennessee Valley Authority,’ another for ‘TVA,’ another for ‘T.V.A’ and so on,” Patrick explained. “With Cosential, I set up data validation fields. Now, when someone creates a new customer record, Cosential flags it if it looks like it might be the same as an existing customer record.”

Cosential also had the out-of-the-box functionality Beltline needed.

“Cosential already spoke the language of contracting and construction, which was great because we didn’t have the time or the means to customize one of the other CRM solutions,” Patrick said. “I know one firm who spent two hundred thousand dollars just on implementation to get Salesforce to work the way they wanted.”

‘Cosential has really helped us improve the organization and communication within our sales process. It’s been very helpful.’
But Patrick was still able to configure Cosential to increase adoption and fit his team's unique marketing and business development processes.

“I removed some fields for rumors, so all you need to create a record is the customer name and opportunity name. If we have a formal request — like an RFP [request for proposal], RFI [request for information] or RFQ [request for quotation] — you need to fill out some additional information. So, as it moves down the pipeline, we collect more data,” Patrick said. “I’m just trying to limit what our operation team has to enter at each stage to be respectful of their time and make it easy for them to use the system, while still gathering the data we need.”

Now, armed with the sales data he needs at each stage in the pipeline, Patrick can easily report on his team’s performance.

“I run a report every two weeks that breaks down pipeline by market sector,” Patrick said. “We also have a management meeting once a month where I’ll present two key reports.”

Those reports include:

- A win/loss analysis.
- A report detailing opportunities in the bidding process and pipeline.

“These reports allow us to dissect what we’re doing right and where we can improve,” Patrick explained.

Overall, Patrick believes Cosential has given Beltline’s leadership team greater insight into their marketing and business development performance and empowered strategic decision-making.

Learn how Cosential can help you analyze and improve your sales processes.