



Automated, Scalable Quoting in Salesforce

Rasmussen's Success Story with MAC

CASE STUDY



About The Client

Rasmussen is a forward-thinking organization, known for its wide array of mechanical solutions for the manufacturing and industrial markets.

As their business expanded, so did the complexity of their operations - especially when it came to generating quotes for their diverse offerings. Rasmussen's sales teams were eager to embrace a future where technology could drive their success.

Recognizing the potential of Salesforce as a central sales hub, Rasmussen joined forces with Marketing Automation Corp. (MAC) to overhaul their manual quoting system and create an efficient, future-proof framework.

The Problem

Before the transformation, Rasmussen's quoting process presented ongoing challenges. For example:

- **Manual, Time-Consuming Procedures:** Sales reps relied on spreadsheets and extensive data entry for quote creation, making it more challenging to maintain real-time accuracy and identify opportunities promptly.
- **Limited System Capabilities:** Rasmussen's Salesforce instance had not reached its full potential. There weren't any bundling or dynamic quote generation capabilities, so it was difficult to price or package products flexibly.
- **Less Structured Approvals & Margins:** Ad hoc approvals and less structured margin calculations had the potential to cause revenue leakage and limit visibility into pricing.
- **Slowed Workflows:** Because the system struggled with more than a handful of products per quote, it delayed responsiveness in a competitive marketplace.

This cumbersome process hindered their ability to seize opportunities in a fast-paced market. Rasmussen needed a scalable solution that would seamlessly integrate into their existing Salesforce environment, preserve accurate data, and reduce the overhead associated with each new quote.



The Solution

MAC stepped in with a clear vision: to transform Rasmussen's quoting process into an agile, automated system built on Salesforce.

The project unfolded in several stages:

Backend Overhaul & Data Structuring

We began by reimagining the very foundation of Rasmussen's quoting process. By building custom objects and fields, we created a robust backend that captured every detail with precision - ensuring that the system was not only scalable for today's needs but also ready for tomorrow's growth.

Enhanced Quote Creation & Line Item Selection

Next, we transformed the user experience by developing a dynamic, two-screen Lightning Web Component.

Not sure what that means? Imagine a sales rep navigating an intuitive interface where equipment, labor, and material costs update in real time as products are added or removed.

We turned a once cumbersome task into an engaging, streamlined experience.

Product Bundling & Revenue Optimization

Understanding the power of strategic grouping, we introduced a feature that enabled sales reps to bundle products in a way that unlocked competitive pricing options.

By limiting the bundling to six groups per quote, we ensured that every proposal maintained its professional polish while offering greater flexibility in pricing.



Automated Default Products & Error Handling

To further ease the workflow, we automated the addition of default products into every new quote. With integrated, real-time alerts and a sophisticated error-tracking system, we minimized the risk of mistakes - allowing the sales team to focus on what they do best: closing deals.

Clone Quote Functionality & PDF Integration

MAC implemented a Clone Quote feature that allowed for quick duplication and modification of successful quotes. Paired with seamless integration into Visualforce-based PDFs, our solution ensured that every proposal was accurate and presented in a professional format.

The Outcome

Operational Efficiency and Speed

Our transformation led to a dramatic 40% reduction in quote creation time. This efficiency boost freed sales reps from tedious manual work, allowing them to focus on building relationships with customers and closing deals.

Enhanced Sales Effectiveness

With our solution in place, the quoting process became more reliable and consistent. Sales teams could generate quotes entirely within Salesforce, leading to improved data consistency, better pricing decisions, and ultimately, higher win rates.



Scalable and Future-Proof

Our approach ensured that the new system was not just a temporary fix - it was a scalable solution designed to grow alongside Rasmussen's evolving needs (for many years to come!)

The modular design of our solution means that as product lines expand and market demands change, Rasmussen remains well-equipped to meet future challenges.

Through our collaboration with Rasmussen, we transformed a labor-intensive process into a dynamic, automated system that empowers sales teams and drives lasting business growth.

Ready to Optimize and Scale Your Organization?



At MAC, our 55+ certified marketing automation and CRM experts are dedicated to turning your challenges into success stories.

We specialize in creating agile, scalable solutions that optimize your operations and drive significant revenue growth.

Let us help you automate, innovate, and stay ahead in your market—no matter how competitive it is!

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