

# Enabling Seamless Commercial Expansion with a Scalable Salesforce Platform



## The Customer

Trusted Smart Security for Homes and Businesses

A leading U.S. smart home security provider and part of a nationally recognized not-for-profit service federation delivers trusted security and automation solutions across Residential and Commercial segments, backed by a strong member network and service-driven reputation.

## Impact Delivered

- 80% improvement in lifecycle visibility
- 50% faster commercial onboarding
- 70% reduction in manual effort
- 60% enhancement in customer experience

## The Challenge

Extending Salesforce Without Disrupting Residential Operations

Launching a commercial workflow introduced new complexities across the organization:

- Distinct operational and pricing structures
- Multi-stakeholder coordination across Sales, Operations, and Field Service
- Integration dependencies with external systems
- End-to-end orchestration from lead generation to service delivery

The objective was clear: enable commercial growth while preserving the stability and performance of the residential business.

## Solution Components

- Sales Cloud
- Service Cloud
- Field Service Lightning

## The Solution

A Unified Commercial Salesforce Architecture

CriticalRiver designed and delivered a customized Salesforce solution for the commercial segment, building on the existing residential foundation to ensure stability and scalability. A phased approach enabled rapid deployment without operational disruption.

The solution included:

- End-to-end Lead-to-Opportunity management
- Structured design, quoting, and contract workflows
- Automated Work Order creation through installation
- Seamless integrations with Sedona Office, Rootstock, and onboarding systems

Commercial-specific workflows, refined data models, and automation unified Sales, Operations, and Field Service, delivering real-time visibility across the commercial lifecycle.

## The Results

A Strong Foundation for Commercial Growth

With a commercial-ready Salesforce ecosystem in place, the organization now operates with greater agility, visibility, and alignment.

The scalable architecture supports continued expansion into the commercial segment while preserving the strength and stability of its residential operations, positioning the company for sustained growth in the smart security market.