Cambridge Air Solutions: A CRM Needs Assessment That Set the Blueprint for Transformation

ORGANIZATION

Cambridge Air Solutions, based in Chesterfield, Missouri, has designed and manufactured commercial and industrial HVAC equipment for more than 60 years, guided by its mission to "Create Healthy Working Environments for Hard-Working People." Its product lines span HTHV space heating (S-Series and SA-Series), make-up air (M-Series), evaporative cooling (ESC-Series and E-Series), and freeze protection (Spec Air Series) for warehouse, distribution, manufacturing, industrial, and transportation facilities. Cambridge sells through independent Rep Firms managed by its Representative Sales Managers (RSMs), supported by Inside Sales, Marketing, Customer Service, and Applications Engineering teams.

CHALLENGE

Cambridge knew its CRM was not serving the business, but the problems were spread across teams and tools. Its Salesforce org had grown piecemeal with no overall data design. Critical processes ran outside any system: territory zip codes were exported from a mapping tool to CSV and loaded by hand into Epicor, Salesforce, and the website; Special Pricing Authorization Requests (SPARs) were searched in an Excel extract; heat load requests arrived by email; building walkthroughs were recorded only in email; and the monthly Rep performance report was built in a large Excel workbook.

Leadership needed a clear picture of what each team actually did, what the CRM should do, and in what order. Without that, a platform change risked moving the same fragmentation onto a new system. Cambridge engaged XTIVIA to run a structured needs assessment across Sales and Service before committing to a design.

TECHNICAL SOLUTION

Why XTIVIA: XTIVIA's CRM consultants work across both Salesforce and Microsoft Dynamics 365, so the assessment judged requirements on business merit rather than on what one platform happened to do.

XTIVIA started with discovery on Customer Service, then expanded the scope to a full review of Sales. The team held regular stakeholder working sessions with Sales leadership, RSMs, Inside Sales, Marketing, Customer Service, Applications Engineering, and Cambridge's Epicor ERP team. They documented a "day in the life" of the RSM role, analyzed the Sales Needs and Sales Management Pipeline material, mapped the service Escalation Process, and inventoried the existing Salesforce objects, Flows, Apex code, reports, and dashboards. We recorded each decision with its date, and logged open questions as named Cambridge action items so nothing was lost between sessions.

The assessment surfaced decisions that shaped the whole program. Equipment, not Accounts, became the central record. Some Salesforce objects were consolidated: Sales Plans merged into Playbooks, Industrial Pipelines became an Opportunity type, and separate Portfolio and Territory objects were dropped in favor of

Rep Firm ownership. Other items were deliberately kept simple, such as tracking RMAs as case tags fed by Epicor rather than building a new entity.

The deliverable was a Functional Specification Document with entity relationship diagrams, field-level requirements, automation and integration specifications, reporting requirements, and a split between a Phase 1 minimum viable product and a Phase 2 backlog. The same document became the build blueprint for the Dynamics 365 Sales and Customer Service implementation, so the assessment investment carried straight into delivery.

BUSINESS RESULT

Cambridge gained a single, agreed definition of how its Sales and Service processes should run in CRM, signed off by the teams who do the work. Pain points that had been accepted for years, such as duplicated zip-code databases, spreadsheet-based lead tracking and inbox-based pre-sale requests, each received a defined CRM solution and an owner. A phased roadmap let Cambridge reach a working system quickly while keeping larger ideas, such as a Rep Firm portal and a Cost of Doing Nothing calculator, on a clear future path.

BY THE NUMBERS

- 60+ years designing and manufacturing commercial and industrial HVAC
- 40,000+ Cambridge installations and 4,900+ contractor partners
- 2 business areas assessed in depth: Sales and Customer Service

KEYWORDS

CRM needs assessment, CRM discovery, functional specification, business process analysis, requirements gathering, CRM roadmap, CRM transformation, current-state assessment

SOFTWARE

Salesforce (current state), Microsoft Dynamics 365 Sales and Customer Service (target state), Epicor ERP, HubSpot, ConfigureOne (SMART), Vonage, E-Spatial

HARDWARE/PLATFORM

Microsoft Dataverse, Microsoft Power Platform, Microsoft 365 (cloud)

ABOUT XTIVIA

For over 30 years, XTIVIA has been a leading B2B technology solutions provider, empowering clients to leverage their chosen technology competitively. We bridge legacy systems with modern innovation through a comprehensive suite of services, including Data & AI, Apps & Integration, Cloud & DevOps, Business Solutions, QA Testing, and Managed Services. Partnering with industry leaders like Microsoft, Liferay, AWS, Databricks, and Boomi, our certified experts deliver customized solutions that drive measurable business results. If you can imagine the business outcome, XTIVIA can create it with intelligent technology and AI-powered solutions. www.xtivia.com