

Leading Manufacturer Aligns Its Global Sales Team With Salesforce

Industry

Manufacturing

Products & Services

Salesforce CRM

Implementation Partner



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The customer is a world leader in flexible insulation foams for equipment insulation market and also leading provider of engineered foams. The foams are primarily used in air conditioning, refrigeration and plumbing in residential and public buildings.

Challenges

- There was clearly no automation process for communication through email.
- Business activities were not organized and mostly not following a repetitive pattern for the same.
- Redundant and manual sales process was another challenge while making headway to aligning the global sales teams.

Solution

Salesforce CRM was deployed as the very first step. Visual Workflow was utilized which in turn helped in automating the business processes by building various process flows and distributing them accordingly to the right users or the right systems.

The process builder also helped in designing a user-friendly graphical representation of the current business process and also to collaborate with different teams in the organization to create those processes. Since their current business process were not optimized, they were further designed and unified to enable the Account leaders in order to negotiate, promote sales, and manage the multilingual aspect of their business.

However, with the implementation and customization of the new Salesforce instance, the Account leaders were now capable of creating promotional campaigns and organize multiple events even while they were working in the field. The applied flow is however an application that executes logic, interacts

internally with the Salesforce database, call out Apex classes, and collects data from the users

Benefits

- Email automation helped in providing exceptional customer experience
- Business and Sales processes are automated.
- User friendly graphical representation of current business process.