

# eFreightship migrates to Salesforce to accelerate sales productivity

## Industry

Travel & Transportation

## Products & Services

Salesforce Sales Cloud

## Implementation Partner



[www.crm.it.com](http://www.crm.it.com)



eFreightship is a globally renowned supply chain solutions company, committed to provide the best customer experience (CX) at the lowest price. They are a one stop shop for their customer shipping needs and work as an extension of their logistics division.

## Challenges

- Managing lead data sources from multiple channels.
- Lack of integrated system / processes to track, nurture, convert, and close leads
- Lack of tight integration of CRM with Office 365 to closely track agent sales activities
- Intricate account and opportunity management processes
- Slow and unresponsive analytical calculations
- Tracking Sales representatives' progress via mobile app

## Solution

To efficiently automate their business needs, Salesforce Sales Cloud was chosen as a comprehensive solution to manage lead, account, opportunity and sales representatives' activity.

- All the customer data from existing legacy CRM application is imported and real-time reports/dashboards are developed in Salesforce to track sales team progress.
- Several customizations are done in the application to automate processes involved in sales data capture thereby making the information in the system accurate and up-to-date.
- Salesforce Lightning for Microsoft Outlook was deployed to integrate sales activities in Outlook with CRM
- Salesforce mobile is configured and deployed to present real-time scorecard on sales team's performance

- The platform is provided as Software as a Service (SaaS) for browser-based access; a mobile app is also available.
- A real-time social feed for collaboration allows users to share information or ask questions of the user community.
- Salesforce Sales Cloud gives representatives, managers, and executives everything they need to connect with customers and focus on what is important—more selling and less administration. It helps you close more deals - faster, gain real-time visibility into sales, and connect with today's social customers.

#### Benefits:

- Salesforce1 mobile/analytics helps in viewing meetings, events, capture leads, update accounts, join conference calls, taking meeting notes, access real time reports/dashboards to monitor agent's performance.
- Salesforce increased sales productivity, conversion rates and also benefited to track the sales representatives daily progress and interaction with potential and existing customers.
- Email integration with Outlook leads to easy contact creation and logging emails and synchronizing events/appointments from Outlook to Salesforce and vice versa.