



Manufacturer

Industry - Automotive (Dealership Group)

Products Used - Sales Cloud
Salesforce Connect



Industry

Automotive (Dealership Group)

The client is an automotive distributor which has sold new and used medium and heavy duty trucks, extensive parts inventory, and financing options for 60 years. With five subsidiaries in North America, it has expanded its transportation offering to a large variety of vendors.

Products Used



Sales Cloud



Salesforce Connect

Challenge



After our client merged with another company, it needed to realign its business processes to ensure organizational cohesion. The dealership group's existing CRM, Arcadium, lacked the flexibility necessary to integrate with DTNA (Daimler Truck North America) portal for ordering, and also Procede, the DMS of the distributor's foremost manufacturing partner, to retrieve order fulfillment information.

While the client had an existing iteration of Sales and Marketing Cloud, it wanted assistance to outmode Arcadium and configure Salesforce to suit its unique operational needs.

- Without a consistent sales process, the client's existing employees and its recent acquisition relied on their interpretation of the process rather than a holistic company vision.
- Our client was inputting time-consuming duplicative manual data entry due to lack of direct integration with its partner.
- Arcadium wasn't customizable or scalable enough to support the client's long-term goal of integrating its CRM with its ERP and their partner company's DMS.
- The processes for updating inventory and achieving opportunity approvals were manual, inefficient, and overly complicated.

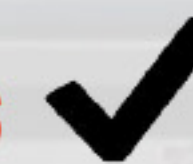
Value Delivered



Gerent reconfigured the client's existing Sales Cloud org to support a unified sales process and used Salesforce Connect to perform value-add integrations with the DTNA (Daimler Truck North America) portal for ordering & Daimler's DMS to meet the client's complex needs, including SpecPro, Daimler's configurator for a custom truck from the chassis and up. Our team:

- Created a unified sales process
- Simplified cumbersome approval processes for inventory intake into one multi-step flow
- Designed dynamic page layouts to reduce the number of fields displayed
- Developed workflows to support new product introduction + streamline customer set-up activities
- Refactored code from previous implementation to improve performance
- Updated Conga-Salesforce integration to newest recommended approach from Conga
- Created an integration with the client's partner using Salesforce Connect

Results



Post-project, Gerent empowered the client to:

- Create a simplified sales process to help drive alignment between the company and its recent acquisition
- Reduce time spent entering new inventory into the system
- Enhance functionality from previous iteration of Salesforce