



Distributor

Industry - Distribution

Products Used - Sales Cloud
Marketing Cloud
Tableau



Industry

Distribution

Our client is a leading international distributor of thermoplastic resin. The company specializes in connecting leading material producers with plastic processors and help clients and suppliers with sourcing and logistics.

Products Used



Sales Cloud



Marketing Cloud



Tableau

Challenge



Our client relied on two systems to track its sales: a custom-built CRM mobile application and Microsoft Dynamics. The custom CRM application was unstable and expensive to maintain, while the Dynamics solution was underutilized across teams.

- Sales teams lacked a centralized, standardized, and reportable system to navigate through the sales cycle
- Sales/Marketing employees had to create workarounds to cope with inefficient, difficult-to-scale processes
- Marketing lacked a centralized place to view and manage outreach/communication subscriptions
- Marketing had to reach out to external teams to garner leads
- Siloed customer and sales data impaired leadership's ability to report on KPIs

Value Delivered



The Gerent team implemented Sales Cloud, Marketing Cloud, and Tableau to create a unified platform for the client's Sales & Marketing teams. Our consultants:

- Migrated prospect, customer, order, opportunity, quote, notes, and market segmentation data into Salesforce
- Migrated existing MailChimp audiences into Marketing Cloud + and created automated workflows for new subscriber acquisition
- Conducted in-person and virtual training to increase SF adoption

Results



Post-project, Gerent has empowered the distributor to:

- Manage the entire customer lifecycle process — from contact to lead to customer — in one platform
- Collect data and report on invoices, orders, and railcar/shipment events
- Standardize the quoting process + quote reporting
- More effectively segment + market to leads, prospects, and customers