



# Manufacturer

**Industry** - Manufacturing

**Products Used** - Sales Cloud  
Service Cloud







## Industry

A long-tenured manufacturer that specializes in providing safe, top-quality mechanical power transmission solutions to customers in the United States.

## Products Used

-  Sales Cloud
-  Service Cloud

## Challenge



Our client needed a robust, easy-to-use framework that would allow it to streamline business processes, facilitate customer data management, drive employee efficiency, and get operationally on par with its parent company.

- The company tracked crucial items like account plans and visit reports in siloed tools like Excel
- Complex processes (e.g., pricing requests) required back-and-forth email communication
- Sales reps struggled to manage their customers and sales opportunities, especially field operatives who only had access to smartphones and tablets
- Service reps needed a single, real-time & remotely-accessible source of customer information.

## Value Delivered



Gerent implemented Sales Cloud and Service Cloud to centralize data across departments, facilitate lead management, and empower employees to provide brand-unique, streamlined customer service experiences. Our team:

- Designed a uniform structure around account plans, growth drivers, and growth initiatives in Salesforce
- Set up integration with HubSpot to synchronize campaigns and lead information between both Clouds
- Created a lead assignment process, empowering sales reps to access and nurture opportunities
- Leveraged custom features to create a minimum-click environment
- Added Email to Case and XMReality to allow for connected service experiences

## Results



Post-project, Gerent has empowered the manufacturer to:

- Immediately access leads, outstanding cases, market insights, and other vital objects within Salesforce's single source of truth
- Stay operationally on par with its parent company and maximize the value of every opportunity