



Manufacturer

Industry - Manufacturing

Products Used - Sales Cloud



Industry

Manufacturing

A leading manufacturer of precision-engineered rubber and plastic products. The company was founded as a trading operation specializing in molded rubber components and has since expanded into product development, prototyping, testing, and certification.

Products Used



Sales Cloud

Challenge



Our client wanted a single platform that could support lead gen, improve pipeline management, facilitate project tracking & reporting, accelerate quoting, reduce manual errors, and limit dependency on ad-hoc spreadsheets.

- Despite relying on business from repeat customers, the manufacturer lacked a comprehensive view of its existing customer base.
- Reps used email, spreadsheets, and notes to record & store data.
- This disorganization extended + complicated the quoting process, as sales reps often struggled to find all the information needed to generate quotes.
- The manufacturer did not have a unified sales process to capture leads, nurture & convert opportunities, create quotes, and obtain customer approval.
- Sales leaders had no way to track project progress or sales activities.

Value Delivered



Gerent launched a Quick Start project to define a unified sales process and implement Sales Cloud. Our team:

- Defined a unified sales process
- Implemented Sales Cloud and activated Leads, Contacts & Opportunities
- Migrated legacy data from emails and Excel sheets into Salesforce
- Activated Sales Cloud's quote module + quote generation tool
- Used Salesforce reports and dashboard to give sales managers key pipeline & forecast insights

Results



Gerent has empowered the manufacturer to:

- Migrate customer data & sales activities onto a single SF platform
- Efficiently track leads, opportunities, and ongoing projects