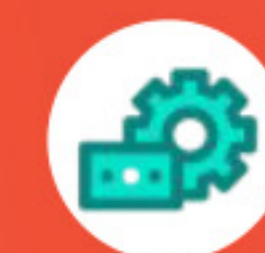




Manufacturer

Industry - Manufacturing (Custom Extruding)

Products Used - CPQ



Industry

Manufacturing

Our client is one of North America's leading custom extruders and specializes in offering top-quality extruded plastics design, engineering, manufacturing, and fabrication services.

Products Used



Challenge



Our client needed a solution to support a streamlined quoting process, facilitate pipeline visibility, and unlock better quote tracking and reporting as the company scales.

- Quote approvals process took place over email without automated support
- Employees compiled information manually from spreadsheets, emails, and a legacy CRM
- Employees could not quickly perform complex functions such as calculating price breaks
- Employees at company acquisitions had no defined sales process to follow

Value Delivered



The Gerent team implemented Salesforce CPQ to support a newly unified custom quoting process. Additionally, we:

- Leveraged automation to build a rapid quote approval process
- Input vital figures, like pricing structure and margin calculations, into Salesforce
- Added a quote document generation capability

Results



Gerent has empowered the manufacturer to:

- Calculate accurate, trackable quotes within Salesforce
- Quickly produce complex quotes with multiple price breaks
- Provide a consistent experience across acquisitions