



Manufacturer

Industry - Manufacturing

Products Used - Sales Cloud




Industry

Manufacturing

A multinational manufacturer specializing in gas appliances, most notably tankless water heaters. The company is undergoing a phase of growth in the North American market and took on a digital transformation initiative with the aim of supporting its growing team and customer base.

Products Used

 Sales Cloud

Phase 1

Challenge



The manufacturer sought to replace its antiquated CRM with Sales Cloud, consolidate its data within one platform, achieve holistic visibility into its quotes/bids/projects/customers, and develop a better sales process that would be less reliant on manual work. Pre-project:

- The sales team had little holistic customer visibility, lacking insight into how opportunities, accounts, and contacts intersected
- The manufacturer's existing CRM did not provide the top-level visibility required to manage multiple quotes and bids relating to large projects
- Sales teams often struggled to understand how quotes related to bids, which contractors and distributors were working together to submit bids, and how bids were associated with projects
- Pricing was recorded manually in spreadsheets and kept separate from the client's existing system; a time intensive process that often proved prone to error
- Quotes were approved within an antiquated task-based system, and users found that steps were easily lost or skipped
- The lead management process was highly manual and recorded ad-hoc in spreadsheets, which led to rep inefficiency, errors, and confusion

Value Delivered



In Phase 1, Gerent replaced the manufacturer's existing CRM with Sales Cloud, enabling the customer's sales team to get a top-level view on multi-party bids/project pursuits and report on opportunities & quotes without inflating pipeline. Our consultants:

- Stood up a standardized lead process for the company's Sales/Marketing teams
- Created a flexible account structure that would allow reps to track multiple personas/stakeholders in Salesforce
- Implemented a 3-tier opportunity structure to track projects, contractor bids, and distributor quotes
- Enabled multi-currency quoting in SF and created a process w/approval checks
- Integrated Salesforce with Microsoft Outlook to enable cross-system updates/logging

Results



By the end of Phase 1, the manufacturer could:

- Track leads with a flexible account structure in a centralized place
- Directly relate products and pricing to quotes and opportunities
- Leverage a scalable and flexible opportunity and quote process