

A photograph of a complex industrial gas piping system mounted on a red brick wall. The system features several grey metal pipes, elbows, and valves. A central vertical valve is prominent, with a horizontal pipe extending to the right and another curving upwards to the left. A yellow warning sign with a flame icon is visible on the wall. A semi-transparent white banner is overlaid at the bottom of the image.

Manufacturer

Industry - Manufacturing

Products Used - Experience Cloud



Industry

Manufacturing

The client is a manufacturer that develops and provides solutions to customers in the plumbing, heating, smart home, and specialist industries. The organization use external sales agencies to reach and sell to its its diverse clientele.

Products Used

 Experience Cloud

Challenge



The client uses multiple external sales agencies to sell its plumbing goods. These agencies employ sales reps to sell the company's products to wholesalers in the plumbing industry. With lack of visibility into its customer accounts, ongoing opportunities, pending orders, and available products, external sales reps struggled to sell effectively. Pre-project:

- External sales reps were unable to access the accounts, contacts, opportunities, orders, and product data in the company's existing Salesforce org.
- Customer service agents were overloaded with fielding order, product, inventory related questions from the external sales reps.
- Sales reps needed access to accurate reporting and visibility into order status.
- Customers grew frustrated by lengthy wait times for crucial information from the external sales reps

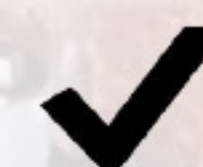
Value Delivered



Gerent implemented an out-of-the-box iteration of Experience Cloud to stand a portal that would provide view-only access to relevant order, account, and inventory data. Our consultants:

- Delivered a Partner Portal that would provide reps with visibility into Accounts, Opportunities, Orders, Products, Reports, and Dashboards
- Set up filtered list views to allow reps to see orders in different stages
- Used Flow to build a search process that would surface user-relevant products
- Created sharing rules for each sales agency to provide relevant data and access to reps

Results



Post-project, Gerent empowered the client to:

- Productively gain time-sensitive information relevant to customers' needs
- Consolidate data in one easy-to-access location
- Reduce load on customer service representatives