

**Industry -** Manufacturing

Products Used - Sales Cloud







## **Industry** Manufacturing

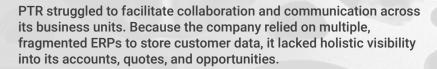
PTR Group manufactures metal and plastic components and creates sub-assemblies for OEMs and suppliers across industries. While the company sells standard parts, it specializes in custom products and actively participates in design, prototype, and production stages.

#### **Products Used**



Sales Cloud

# Challenge



- Reps managed the sales process via email, spreadsheets, PDFs, and personal checklists.
- Salespeople lacked efficient communication channels for cross-selling and had to personally and proactively loop in other BUs.
- Tasks and follow-ups were handled manually on to-do lists and personal routines.
- Sales Summaries/Reports were manually collated and provided via email.
- Sales lacked a defined lead management process.

PTR wanted to use Salesforce to improve data visibility, drive collaboration, gain strategic pipeline insights, and capitalize on white space opportunities with existing customers.

# Value Delivered



Gerent implemented Sales Cloud to provide sales/service reps with a holistic customer view, drive cross-BU collaboration, and identify white space opportunities. Our team:

- Migrated account, contact, and opportunity data from <sup>3</sup>/<sub>4</sub>
  Business Units
- Implemented a unified sales process for all Business Units and additional functionality for key stakeholders (engineers, etc.)
- Stood up sales cycle automations to manage work and adjust rep capacity

### Results



After implementation, PTR Group was empowered to:

- Cross-sell quickly and collaborate with customer context in view
- Categorize leads by Business Unit and transfer to relevant staff
- Automate reporting for additional visibility into the sales process
- Trusts the Gerent team deeply and has signed further contracts with Gerent
- Requested the same Gerent team for future phases