



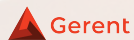
Van Horn, Metz & Co.

Your Global Supply Chain Partner

Industry - Distribution (Raw Materials)

Products Used - Manufacturing Cloud
Sales Cloud





Industry

Distribution (Raw Materials)

Van Horn, Metz & Company is a leading distributor specializing in sourcing raw materials for customers in North America. With global sourcing capabilities, 12 warehouses, and six sales offices, VHM is well-equipped to fulfill raw material needs while maintaining its region-specific focus and attention.

Products Used



Manufacturing Cloud



Sales Cloud

Challenge



Van Horn, Metz, and Company (VHM) intended to leverage Sales Cloud and Manufacturing Cloud to ensure accurate sales team reporting, improve lead management, ensure team adherence to a defined opportunity management process, and achieve better visibility into sample management.

Pre-project, VHM reported several challenges, including:

- **Incomplete data + inaccurate reporting** | VHM lacked a central system for tracking leads and could not enforce data validation when reps manually entered information, leading to inaccuracies and reporting inefficiencies.
- **Limited visibility into lead management** | Leads were accepted via a web form and distributed to sales reps via email; sales had no system to track lead progress.
- **No process enforcement for opportunities** | VHM had no way to mandate adherence to its opportunity process, often leading to sales reps skipping required steps and/or submitting incomplete data.
- **Sample management tracking** | The suppliers and customer service reps responsible for fielding sample requests did not receive automated follow-up reminders about in-progress requests, which occasionally led to samples being forgotten.
- **Limited quoting** | Quotes were stored within VHM's old CRM system as free text notes, which made producing standardized quotes difficult.

Value Delivered



Gerent worked closely with VHM to implement the company's opportunity process within Sales and Manufacturing Cloud, ensure data validation, improve reporting, and enhance sample management and quoting. Our team:

- Customized VHM's Sales Cloud + Manufacturing Cloud environments, then implemented the company's sales process in a scalable and efficient manner.
- Built a centralized system to track and enable reporting on all sales activity.
- Used Validation Rules and Custom Validation with Flow to enforce data validation within the opportunity management process.
- Stood up a custom screen flow to facilitate sample requests and reminders.
- Enabled rapid, accurate reporting on all sales data in Salesforce.
- Mapped an integration between VHM's ERP and SF org that would allow sales reps to visualize data within the context of the overarching sales process.
- Introduced Salesforce quoting with line items and standardized PDF generation.

Results



Post project, Van Horn, Metz & Company can:

- Queue and assign new leads within Salesforce, then track progress and outcomes using SF Reports.
- Enforce opportunity process adherence and ensure data completion.
- Better manage samples-in-progress by automatically assigning follow-up tasks to designated service reps.
- Use standard Salesforce functionality to quote from a given opportunity and, if applicable, add tier-based prices. PDFs can be generated from Salesforce and sent directly to customers with Salesforce Inbox.