

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.

### Challenge

PTR struggled to facilitate collaboration and communication across its business units. Because the company relied on multiple, fragmented ERPs to store customer data, it lacked holistic visibility into its accounts, quotes, and opportunities.

- 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.

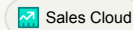
PTR wanted to use Salesforce to improve data visibility, drive collaboration, gain strategic pipeline insights, and capitalize on white space opportunities with existing customers.

### Solution

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

- Migrated account, contact, and opportunity data from  $\frac{3}{4}$  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

### PRODUCTS USED



### Outcome

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 our team deeply and has signed further contracts with us
- Requested the same team for future phases

