INDUSTRY | MANUFACTURING

**PTR GROUP LP**

**(Phase 2)**

PTR Group is a manufacturing company which creates components and 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

Following a successful Sales Cloud implementation, PTR Group wanted to build a time-saving, convenient self-service portal for its external sales reps with Experience Cloud. Pre-project, PTR's communication with external sales reps was inefficient and required significant manual effort.

- External reps could not access PTR's Salesforce org and needed to call the manufacturer's HQ with new leads and updates.
- PTR Group's HQ staff had to manually update leads, opportunities, and activities within Salesforce.
- This process led to miscommunication, missed information, inefficiency, and a lack of high-level insight into external sales rep activities.
- Sales managers had no way to track external sales rep activities or measure performance.

By building a Partner Portal with Experience Cloud, PTR Group intended to:

- Allow independent sales reps to directly log their leads, opportunities, and activities within Salesforce.
- Give sales managers insight into their teams' opportunities.
- Establish a unified system for tracking and measuring Sales Representative performance, thereby allowing for data-driven performance management.

### Solution

Our team worked closely with PTR Group to develop an intuitive and accessible partner portal for PTR Group's team.

- Created a platform for sales agents to collaborate on leads, accounts, and contacts
- Configured automations that would enable sales managers and sales reps to communicate more efficiently and close opportunities faster
- Built reports and dashboards that would allow PTR Group to analyze sales rep performance
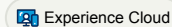
## Outcome

By the end of the Phase 2, PTR Group was able to:

- Establish a centralized collaboration platform for its internal + external sales team members

- Accelerate the sales cycle by allowing sales managers and reps to collaborate more effectively on opportunities

- Achieve a better understanding of sales rep performance with reports and dashboards

- In a future phase, ou team and PTR Group will be embarking on a Manufacturing Cloud implementation.