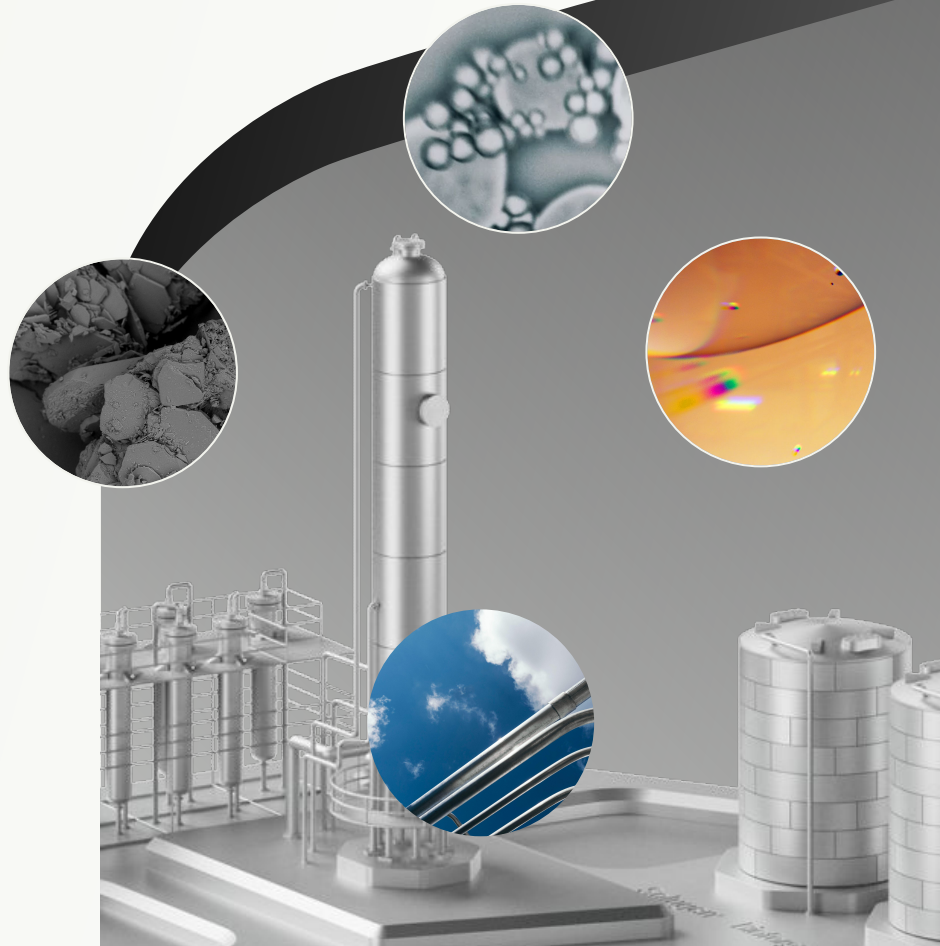


INDUSTRY | MANUFACTURING (SPECIALTY CHEMICALS)

Solugen (Phase 1)



Solugen is a specialty chemical manufacturer that creates safe, cost-effective, and environmentally-friendly chemical formulations. The company designs its own formulations through bioforge operations; it also distributes common chemistries in full and dilute concentrations.

Challenge

Solugen sought to stabilize its sales process + establish workflows for new product introduction, account setup, and customer service within SF.

- Solugen lacked a cohesive sales process for commodity & spot-buy selling; its existing SF instance did not leverage product, pricing, or workflow automation functionalities.
- Sales reps needed to input opportunity values manually and had no guardrails to ensure that prices fell within acceptable margins or underwent proper approvals.
- Manual quoting often resulted in inconsistent value costs & freight info; this led to an over-dependence on corrective input from the supply chain team.
- The team had no way to manage workflows for new products (e.g., formulation, vendor, packaging type, etc.).
- Sales lacked a unified complaint process to document & manage service issues, and couldn't track leads post-conversion or tie Salesforce Accounts to relationship management activities.
- Because Sales set up new customers in Netsuite post-deal closure, supply chain management often struggled to complete financial & legal activities in a timely manner.

Solution

Our team helped Solugen to create a harmonized, well-supported sales process. We focused on lead cultivation, relationship management, pricing controls, sample management, and demand reporting.

- Solugen lacked a cohesive sales process for commodity & spot-buy selling; its existing SF instance did not leverage product, pricing, or workflow automation functionalities.
- Developed a custom table to establish pricing margins for every industry + trigger notifications when adjusted sales prices overshoot acceptable limits
- Built automated workflows to facilitate sample management across teams
- Instituted reporting capabilities to provide visibility into unconstrained demand
- Set up a simple case management process to facilitate customer service activities
- Positioned the team for a future Netsuite integration

Outcome

Post-project, we empowered Solugen to:

- Streamline and standardize its processes
- Reflect deals in SF + use actionable pipeline reports
- Optimize business controls + reduced preventable revenue leakage
- Increase visibility into how sales development reps contribute to opportunities & revenue growth
- Improve sales and operations planning

