marlabs
driving digital agility

Salesforce CRM implementation increases and aligns sales and customer service efficiency

Client

Our client is a leading manufacturer of indicators for circuit boards and instrument panels including LEDs, LED arrays, and light pipes. They have a broad range of high-specification lighting fixtures exclusively designed for applications in industrial, commercial, hazardous location, transportation, and public infrastructure domains.

Challenge

Our client faced challenges such as inaccurate estimates and poor pipeline visibility in addition to issues such as time wasted on administration. They needed a solution that would provide an intelligent single view of their business by taking input from the various systems. They wanted to manage information easily so that less time was spent handling data leaving more time for actual business activities. The need was for a manageable, economical, and low-risk solution with minimum direct investment to increase and align sales and customer service efficiency.

Marlabs Solution

Marlabs analyzed the client's requirement and came up with a solution using Salesforce, which is a swift and secure application with 100% uptime and therefore does not require hardware or software installation. This can be setup swiftly and offers integrated analytics features to provide real-time reporting, calculations, and dashboards. It also does not involve huge one-time investment. Marlabs developed and implemented a custom Salesforce CRM solution involving activities such as initial data loading, administrative setup for all security and sharing, developing custom reports and dashboards, and providing online training/demo.

Highlights of the solution are given below:

- Initial Data Loading: data analysis, data cleansing, additional custom fields creation for the needs, data and object mapping, data loading, and data validation
- Security and Sharing: organization wide defaults, role hierarchy definition, role hierarchy setup, role assignment to the users, validation of data as per roles, setting up groups (public), and defining sharing rules
- Custom Reports and Dashboards: custom report creation, custom reports as per organization needs (estimated no. of reports - 8), sales team member individual dashboards (estimated no. of reports - 1), and organization wide dashboards (estimated no. of reports - 1)
- Training/Demo: 6 sales regions - 3 USA + 1 Middle East + 1 Europe + 1 Australia

Benefits

- Quick detection and rectification of ineffective sales processes
- More precise forecasts and enhanced pipeline visibility
- Faster and more receptive interaction with customers
- Enhanced cooperation across divisions
- Increased productivity

Technologies

- Salesforce
- GoToMeeting