

CASE STUDY IMPLEMENTING SALES CLOUD TO TRACK OPPORTUNITY



Project overview

A major U.S. based wholesaler needed support in managing sales and contact repositories across multiple markets.

They needed a customized system which could:

- Create a repository of Accounts & Contacts and related functionality setup across markets
- Enable opportunity tracking which could target specific sales to accounts with a price book.
- Enable collaboration with the opportunity team
- Create and track opportunities across stages and assign it to the right sales rep
- Include a price book to build opportunity by SKU / Category
- Create opportunities at HQ level and functionality to split target budget automatically or manually for underlying markets

Additionally, the sales team conducts several popup events. This tool was required to track these events using a campaign functionality, capture quantitative data across events for comparison and success analytics (something that would require Salesforce and Tableau integration).

The sales team also expected to run these reports on Microsoft Surface so that they could see real-time client reports.

Finally, the sales team needed to be able to drive to different appointments and they wanted to integrate Geopointe MAPS for this purpose.

Aim:

Our aim was to configure Sales Cloud systems to track sales opportunities to specific accounts with price books, generate real-time driving routes, create revenue heatmaps, and track performance of pop-up events.

- 1) The system should be able to render Tableau reports in Salesforce portals specific to the account being visited.
- 2) There should be integration with Geopointe MAPS to allow for real-time travel information including:
 - Outlook calendar sync with Salesforce for appointment scheduling
 - Routing and Optimization
 - Keeping track of visits, check in/check out, last visit date, and call logs
 - Heat-mapping on the basis of revenue
 - Assign visit priority by revenue



Results:

- 1) The system successfully tracked performance of sales team and help them meet targets.
- 2) Sales was boosted by 10% and sales reps were able to operate across larger territories.
- 3) Outlook calendar integration with the driving route which made last-minute changes possible.
- 4) Help sales team to service clients bases upon the demand, visits, revenue etc.
- 5) Provided real time information to management about sales team visits, events, sales comparisons.
- 6) Able to track Opportunity by Territories and stage.
- 7) Compare success of the Campaigns and capture customer feedback for the future sales events.