



Accelerating service sales in the Marine & Energy industry

“Recommending this if there are needs to generate and send documents directly from Salesforce. The template and the functionalities are well customizable and the editor is built well once you get the hang of it.”

Customer Profile

The customer is specialized in manufacturing and servicing power solutions for the marine and energy industries. They have approximately 17,800 employees across more than 280 locations in 79 countries, with annual revenue of around 6 billion euros.

Challenge

- A global service sales unit serves enterprise customers across the marine and energy sectors.
- With sales engineering teams distributed worldwide to cater to local customer needs, ensuring adherence to internal standards was challenging.
- The unit also faced inefficiencies caused by unstandardized sales processes.

Documill's Value

- Documill became a key part of the company's sales tool, streamlining the creation of professional, customer-ready service offers and order acknowledgments within Salesforce.
- Localization: The solution enables the preparation of offers in 18 languages, meeting the needs of local teams efficiently.
- Standardized offer creation: It enforces a consistent approach, with clear guidance and compliance checks to ensure all offers align with internal standards, regardless of the location.
- Seamless Salesforce integration: Fully integrated within the Salesforce interface, it allows users to generate and manage documents without leaving the relevant object or record.

Documill's impact

- Efficiency: Automated document generation cut preparation time, allowing sales teams to focus on customers and strategy
- Consistency: Standardized offers ensured adherence to internal standards
- Adoption: Operating directly within Salesforce's browser made the tool intuitive, driving high adoption with minimal training

INDUSTRY

Marine & Energy

PRODUCTS

Documill Automate

