



**MOLD-TEK**  
*Technologies Limited*

[www.moldtekit.com](http://www.moldtekit.com)

Add Agility to Your Business!

## Our Salesforce CRM solution from Manufacturing Industry

In today's competitive world of ever changing customer preferences and quick market shifts, manufacturing companies need to be agile in catching up to the speed of new trends and attending to the needs of the customers. Our Salesforce CRM solution plays an integral part of adding agility to your manufacturing business process.

With our solution, manufacturing companies can enjoy better insights into forecasting, customer engagement and customer service excellence. They can even improve planning and most significantly simplify manual workflows and processes.

There are 2 ways to market and sell products – 1) Direct Channel, where SKUs are directly sold to the customers and 2) Indirect Channel, where SKUs are sold to customers through a network of distributors and stockists

This section describes our solution for Direct Sales Channel.

### Key highlights of our Salesforce CRM solution for Direct Sales Channel

#### Customer Management

**Get a holistic and 360-degree view of your customer**

- Manage all information of your customers – their orders – past, current and projections; pricing agreements; expected revenue; payment terms etc in a single location
- Get real time information about orders on hand and compare revenue from a particular customer with that of other in the same industry segment
- Graphical representation of monthly revenue from each customer – compared to the same last year
- Key Account Management – assign sales members to key customer accounts and manage all interactions – orders, forecasts, trends, complaints, feedback etc. through a single point of contact
- Maintain strong relation with each customer by sending automatic emailers, capturing their feedback and maintaining all communications with their company in a single location

## Campaign Management

- Create various kinds of campaigns – email, exhibition, outdoor, hoarding, advertisement, visits, demonstrations etc
- Maintain budget and check list for each campaign
- Track ROI from each campaign
- Get intelligent insights on what kind of campaign has best ROI for specific SKU type and geography

## Lead Management

- Collate leads from various sources into a common database – Website, tele calling, social media, third party websites, direct marketing and campaigns
- Define a custom workflow for your 'leads to order' process and track each lead. The process might be Lead -> Warm -> Hot -> Negotiation -> Agreement -> Customer
- Assign leads to specific sales members based on geography and SKUs
- Leads which turn cold can be grouped into various segments and revisited for other SKUs
- Get custom reports and real time insights into the leads through our dashboards

## Quotation Management

- Create customized quotations for each customer - SKU wise
- Track history of all quotations shared with the customer
- Capture agreements, Purchase orders, payment & delivery terms for each customer order
- Production Planning & Order Management
- Create production request – a) make to stock b) make to order and c) make to sample (link the production to a specific customer order )
- Track the status of each order – SKU wise and customer wise : Queue -> Production -> Packing -> Dispatch -> Delivered
- Get a real time insight into the status of each order and send automatic status mails to customers on dispatch
- Reports and Dashboards for birds eye view

## Integrate with ERP

- Integrate salesforce with your ERP – SAP, Tally, MS Dynamics, Oracle etc
- Track payments, order status, collections, inventory etc
- Seamlessly send product orders from CRM to ERP

