



Sales Transformation through Lightning

BECKMAN COULTER

The client develops, manufactures and markets products that automate and innovate complex biomed testing. Their products are making a difference by supplying critical information for improving patient health and delivering trusted solutions for research.

Solution

Wilco Source leveraged Sales Cloud Lightning and Salesforce platform capabilities to design a solution that streamlined their sales process. Salesforce triggers were developed to automate opportunity creation from Pardot form submissions on the Beckman website. Predefined logic ensured that opportunities were created only when specified criteria is met. This ensured lead qualification before an opportunity is created thus controlling the volume of opportunities.

Contacts and opportunities were assigned based on territory mapping. This resolved issues related to record ownership and eliminated redundant and uncoordinated sales calls. Email alerts were developed leveraging workflow rules to notify sales representatives when an opportunity of their interest is created. This provided visibility into high-quality opportunities so the sales rep could pursue it in a timely manner. This drastically reduced lost revenue opportunities and improved customer satisfaction.

Wilco Source created custom Visualforce reports to provide a better visibility into their pipeline and to manage the opportunity funnel better. We helped them perform campaign ROI analysis by associating opportunities with campaigns so they could determine which campaigns were the most successful. Highly customized dashboards were developed to provide real-time sales intelligence to management.

Challenge

Beckman Coulter wanted to improve and streamline their sales process. Sales representatives were spread across 40 countries, working with a Salesforce database that contained over one million contacts. Managing and assigning a high volume of opportunities to sales teams became extremely difficult. Multiple sales representatives would call on the same customer, without knowing that other sales representatives were also contacting the customer. On the other hand, opportunities that needed immediate attention were not getting attention due to lack of visibility to such opportunities at the right time. This was causing a high degree of customer dissatisfaction, as well as lost business opportunities. Their goal was to be more efficient in managing leads and opportunities using Salesforce and Pardot.

Beckman was also investing a significant amount of money in marketing and they weren't sure they were achieving the desired return on that investment. Inability to access the appropriate data was preventing them from gaining access to the intelligence on sales performance that they needed.

To solve these problems, Beckman Coulter was looking for a partner with strong Salesforce development and implementation expertise.

Results

Wilco Source delivered a solution that allowed Beckman Coulter to efficiently manage their leads and opportunities with speed and accuracy. We also executed a comprehensive change management effort to ensure that the transition from Salesforce Classic to Lightning went smoothly - minimizing disruption across a widely dispersed, multi-national sales organization.



800+
USERS

Sales Enablement in Lightning for 800+ users



40+
COUNTRIES

Change Mgmt. of users spread in 40+ countries