

“ Comprehensive Work Order, Sales Management hosted over the Sales Cloud for steering in productivity ”

Company Overview

Industry Type

Height, Safety and Maintenance

Location

Sydney, Australia

Solution Used

Sales Cloud



Challenge

- The client was a major provider of heavy equipment suspension cables for height and safety and maintenance.
- Before us, they managed all data over spreadsheets. This meant appointments, employee database, and client assignments were all done manually.
- There was an absence of standardized processes for sales and work order management to update employee information, allocate tasks, and track employee-productivity. Understandably, this drove up TATs by several folds.
- The provider also needed automation to schedule appointments and send related reminders.



Solution

- We started with the migration of all data from Excel to Salesforce and configuration Salesforce methods.
- A work order management process was set up in Salesforce that allowed smoother control over employee data, afforded a separate portal for employees to update their details and access documents.
- A complete sales order management solution was also drawn out. Under this, a dynamic calendar kept tabs on the list of tasks carried out by the employee in the last week, and those to be completed in the coming weeks.



Result

- Initially, the company set out with only 2 employees, and with the ease of use and scalability enabled by Salesforce, their numbers have now grown over a 100.
- The client experienced elevated order management, with lower overall TATs.
- And with scheduled reminders, no activity fell through the cracks, and the overall productivity of employees stayed high.
- The overall efficiency of the employees increased too, which caused an increase in sales too. Automated schedulers allowed sending out timely appointment confirmations and regular reminders.