

Wallace Instruments



Wallace Instruments is a world-renowned manufacturer & supplier of materials testing equipment to over 60 countries worldwide.

The Opportunity

Under new ownership, Wallace needed to capitalise on an exceptional brand name started in the 1950's and create a scaleable, efficient customer experience and channel management solution in order to support ambitious growth plans.

Wallace had been using Salesforce for a number of years but the solution had never been optimised to support current processes for global inbound enquiries or sales, service and parts quotations.

The new Managing Director and Owner, Chris Norvall and the Sales & Service Manager, Chris Mundy realised that a key component in supporting planned growth involved substantially reducing the time taken for reactive and often manual tasks so that key personnel could focus on improved service and customer experience for customers, agents and resellers.

The Solution

InspireXT worked closely with Wallace during a number of workshops to fully understand and define current and future processes, internal



and external stakeholder pain points and aspirations to radically improve the channel management strategy.

New and revised business processes were then agreed to facilitate effective inbound enquiry management, lead and opportunity management, products and pricing allocations and a common process for quoting sales, service and parts. InspireXT then created a Phase 1 scope aimed at

re-baselining existing Salesforce foundations whilst delivering a suite of new functionality in a short space of time. A roadmap of Salesforce based initiatives was also created to grow greater understanding of wider Salesforce functionality, avoid unnecessary third party application investment and ensure the initial phase would be future proof.

High intensity detailed requirements gathering workshops were then conducted and recorded to make sure that day to day business operations were minimally impacted, the scope and benefits were clear and expectations around project delivery were aligned. This in turn allowed the InspireXT Business Analyst and Solution Architect to accelerate solution build and test.



Solution Tools & Components

InspireXT deployed a number of tools and accelerators during the course of the project, including:

- DILO (Day in the Life of) assessments
- Level 1 & 2 swim-lane based process mapping
- 'MvP to Horizon' initiative road-mapping based on
 - Budget
 - Business Case
 - Capacity for Change
 - Impact on Day to Day Operations
- Design Thinking
- Tried & tested Hybrid Methodology

Salesforce Sales Cloud was used to deliver the following functionality:

- New Lead Management Process
- Revised Opportunity Management Process
- Inbound Enquiry Management
- Products & Pricebooks
- Allocation of Pricebooks to Channel
- Quotation Production & Delivery
- Service Management Queue
- Outlook Integration
- Operational Reporting
- Executive Dashboards

The Outcome

The solution will free up Sales & Service Administration time in order to pre-actively follow up leads, opportunities and quotations



Other enquiries can easily be routed directly to other members of staff including the Engineering & Technical team for returns, technical queries and service requests. Management escalations can be actioned with visibility of progress which has avoided admin time wasted in chasing up internal requests. The Sales & Service Manager is able to monitor and influence performance through the channels and the Managing Director dashboard provides significant insight into overall performance that was previously unavailable.

The quotation creation process has been significantly streamlined and product pricing is more consistent and easier to manage across each of the respective channels and geographies.

Impact Areas (to be validated with Wallace)

- 40% increase in Sales & Service Admin time now available or follow-ups
- Faster throughput of quotations and queries
- 50% reduction in quotation production time

- Outlook and Salesforce working together to optimise customer interactions
- Consistent pricing and a 100% reduction in the number of 'active' pricebooks
- Elimination of complex spreadsheets and manually driven processes
- First ever accurate view of overall and channel performance
- The right foundations to support future phases such including:
 - Reseller & agent self service
 - Enhanced and accurate forecasting
 - Field Service Management
 - Contracts Management
 - ERP integration

Customer Quotation

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Chris Mundy
Sales & Service Manager

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