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global sales team & pipeline management

INTELLIGENT AUTOMATION | SALES | PIPELINE | CHANNEL MANAGEMENT

visual engineering
LIGHTWARE

salesforce **PARTNER**
SINCE 2015

our story in a nutshell

Lightware Kft. is a 100% Hungarian owned, professional audio and video equipment manufacturer with a global footprint and a key position in the international market.

The company has offices in 12 countries on 4 continents with over 60 active sales professionals. **It was quite a challenge for the Budapest hub to standardise, control and improve the workflows of the teams in the various countries.**

The reporting system was difficult to operate, which compromised the efficient decision-making mechanism based on the system. **Processing the influx of leads proved cumbersome, while control over pricing also diminished due to international operations.**

The case study demonstrates how we built a fully automated international sales solution for our partner.

The solution was implemented as a process automation project in two phases:

- **first, we launched a pilot to streamline and automate** the processes in the Hungarian hub

- after successful testing and optimisation, **we rolled out the complete system in concert to the 12 countries**, considering local aspects

This case study presents the details of the project implementation. **We hope you can use our learnings in your work!**

ISTVÁN KELLÉNYI   GÁBOR KISS

FOUNDERS, CRM AUTOMATION EXPERTS

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our story in a nutshell

6
MONTHS

to deliver the global CRM solution developed with a focus on process optimisation and rationalisation.

12
COUNTRIES

where work is done using a standard sales process and rules in all partner offices.

220%

more successfully processed leads in the first year only.

4X

aster completion of sales forecasts with proportionately improved accuracy.

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the challenge

WHAT WERE THE PROBLEMS WE AIMED TO SOLVE?

BUSINESS BARRIERS

What bothered the management most was that the project pipeline simply did not properly reflect reality**, which strongly lessened the reliability of forecasts.**

Besides, the classic teething problems of the sales system just undergoing its growth phase also exacerbated, **leads received by e-mail reached the dedicated sales office slowly if at all**.

The lead attrition rate was high, consequently **customer experience was not satisfactory, either.**

TECHNICAL COMPLICATIONS

It was no surprise for our experts that r**eporting was made completely manualy-ly in each office, offers were created in various formats** (e.g. ODOO ERP), then dispatched one by one following approval by e-mail.

Price lists were managed in Excel tables and were difficult to follow. They were also published and sent out to customers by office personnel that also slowed down the process. Sent documents frequently contained errors caused by manual processing that could have been avoided easily.

"...it happened that 5 different subcontractors submitted an RFP for the same project, which sales forecast misinterpreted as having a 5x value..."

the solution

STANDARDISED INTERNATIONAL SALES PROCESS ALIGNED TO LOCAL NEEDS

We developed, tested and prepared all detail steps of the **sales process designed for global operations.** This was the baseline all countries built on later.

In the second phase, we identified the local particulars of each foreign office, which **we used to complement the core system ensuring to keep the standard process and reporting capabilities in all cases.**

We took the sales operations of Lightware to the next level as follows:

management **received up-to-date, unbiased information** based on the pipeline

- offers are created and dispatched fast using **standard, branded templates**

- reporting is automated, **just one click** to generate reports

- **team members receive real-time alarms any time the system detects neglected leads or offers with approaching their due dates**

„…administration is a typical area suitable for automation…"

results

90% LESS NEGLECTED LEADS PER MONTH

Sustained process optimisation and standardisation paid off as the sales mechanism of **Lightware was completely revamped by the end of phase two, delivering excellency fit for an international company.**

What does this mean in practice? Streamlined, transparent, standard and faster processes has made the work of the sales force more efficient.

Admin tasks **reduced to nearly zero** enabled the sales team to finally focus on their primary role: to maximise sales in all 4 continents.

The Budapest hub can at last monitor performance in real time on a common platform with the other offices, resulting in substantially shorter management decision-making, which also brought a step change in quality for the business.

Since time loss from human carelessness or quality decline cannot happen in smart automated systems, considerably less leads are lost when the hands of the international sales teams are full.

„...management had a more comprehensive view on sales, and could respond fast to business challenges like COVID-19 when everything was in a state of flux..."

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do you like our story?

More customers? Yes. More efficient process management? Yes. Increasing profit? Yes. With an increasing number of new contracts? Yes. All this automated wherever possible to rule out potential errors? Exactly. Minimised manual data entries? Like this.

CONTACT US IF YOU HAVE ANY QUESTIONS ABOUT THE SOLUTION!

I WANT TO GET IN TOUCH!

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