

Nysa, April 2022

Reference letter

ZPC Otmuchów S.A. has been working with Cludity since May 2021. Recently, we completed a comprehensive project, whose primary goal was to improve a number of processes related to offer creation and sales in our organization. The scope of work included:

Implementation of:

- Salesforce Sales Cloud;
- Tableau;

improvement of:

- lead management – lead conversion, aggregation, and processing;
- contact and account management – aggregation of company data and contacts;
- sales processes – creation of two sales paths: for import and export, with a single sales process for domestic and international offers;
- case management – customer complaints and the approval process in one place;

as well as:

- creation of sales process staging;
- unification of offer layout;
- Salesforce-Outlook integration;
- Salesforce-SAP integration;
- product and price book management;
- creation of a functionality for adding product photos;
- automated reporting in Tableau;
- creation of Tableau dashboards;
- comprehensive Tableau workshops.

We now have an effective tool for creating, managing, and monitoring budget and sales plans; we can generate standardized offers more efficiently, and all key data is stored in one place – on the Salesforce platform. We are pleased with the course of the project and its results, and recommend Cludity as a trusted implementation partner of Salesforce technology.

Regards,
Miroslaw Pencak, Director of Process Development and IT,
at Grupa Otmuchów

