



SETLERZ

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Salesforce Sales Cloud Case Study





Our Client Overview

- **Lead Tracking Issues:** Difficulty in capturing, prioritizing, and following up with leads efficiently.
- **Opportunity Management Problems:** Lack of a structured approach to tracking opportunities through different sales stages, leading to missed deals or lost data.
- **Sales Process Automation Gaps:** Manual, repetitive tasks are consuming too much time, and there's a need for automation to improve sales productivity.



Challenges

1. Tracking Leads

- Lead Capture Automation
- Lead Scoring
- Lead Assignment

2. Managing Opportunities

- Opportunity Stages
- Pipeline Reports & Dashboards
- Opportunity Management Automation

3. Automating the Sales Process

- Workflow Automation.
- Email Automation.



Solution Implemented

As a Salesforce Consultant, I implemented a structured solution:

- Implemented Lead & Opportunity Management for better tracking.
 - Automated sales workflows using Process Builder and Flows.
 - Integrated Email and Call Tracking for enhanced customer engagement.
 - Created Custom Reports & Dashboards for real-time sales insights.
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Results & Impact

- Increased sales efficiency by 40%.
- Reduced manual follow-ups, leading to faster deal closures.
- Improved pipeline visibility and forecasting accuracy.



CONCLUSION

By leveraging Salesforce's powerful capabilities, the company improved efficiency, automation, and business growth. This case study demonstrates how a well-optimized Salesforce implementation can drive success.

