



Salesforce Implementation Case Study: Manufacturing Industry

Client Overview:

Our client is a pioneer in utilizing inland waterways in Goa. They specialize in constructing a wide range of maritime vessels, including barges, dredgers, fishing trawlers, and ocean-going vessels. The company has built numerous vessels for clients both in India and internationally. Significant investments have been made to expand their shipbuilding facilities.

Business Challenges:

- 1. Low Visibility on Sales Rep Performance & Enquiry Tracking:** The legacy system lacked visibility into sales representatives' performance and did not effectively track customer inquiries.
- 2. No Unified Platform for Vendor Management:** Vendor management was decentralized, leading to inefficiencies and a lack of coordination.
- 3. Complex Pricebook Management for Vendors:** Managing price books for vendors was cumbersome, making it hard to place purchase orders based on updated pricing.
- 4. Manual Communication with Vendors:** The absence of a centralized platform resulted in time-consuming and error-prone manual communication with vendors.
- 5. Difficulty Finding the Best Deals Across Multiple Quotations:** Comparing quotations from different vendors manually led to missed opportunities for better deals and cost savings.
- 6. Lack of Credit Limit Management for Vendors:** There was no automated system to manage and track credit limits for vendors, risking over-exposure and financial issues.
- 7. No Vendor Portal for Quotation Access & Response Submission:** Vendors did not have access to a platform for submitting quotations and responding to requests in real time.
- 8. Insufficient Reporting & Dashboard Visibility:** Lack of real-time reporting and dashboards made it difficult to track procurement activities and vendor performance.



CONCLO Technologies Solution:

- 1. Salesforce CRM with Sales Tracking:** Implemented Salesforce CRM to track sales inquiries and monitor the performance of sales reps in real time.
- 2. Centralized Vendor Management Platform:** Created a unified platform on Salesforce for seamless vendor relationship management, enhancing coordination and workflow.
- 3. Automated Pricebook Management:** Integrated automated pricebook management tools, allowing vendors' pricing to be updated and reflected in purchase orders.
- 4. Vendor Communication Portal:** Introduced a real-time communication portal to send and receive updates, eliminating the need for manual interactions.
- 5. Quotation Comparison Tool:** Developed a system for vendors to submit quotes, allowing the sales team to easily compare pricing and select the best deals.
- 6. Credit Limit Automation for Vendors:** Enabled automated credit limit management in Salesforce, ensuring credit limits are tracked and adhered to for each vendor.
- 7. Vendor Portal for Easy Access & Response:** Built a dedicated vendor portal where vendors can view, respond to, and update quotations directly.
- 8. Advanced Reporting & Dashboards:** Implemented customized reporting tools and real-time dashboards to track procurement activities, vendor performance, and deal comparison.

Conclusion:

By implementing a customized Salesforce solution, CONCLO Technologies successfully addressed the client's challenges in vendor management, sales tracking, and procurement efficiency. The integration of automated systems for price books, credit limits, and quotation management streamlined operations, enhanced decision-making, and improved vendor relations. With real-time visibility through dashboards and reporting, the client now has a robust, centralized platform that drives better deals, reduces manual effort, and increases overall operational efficiency.