

Salesforce Adoption & Platform Enhancement for a Global Pharma Excipients Leader

Transforming a core sales system into a business-critical ecosystem across Sales Cloud, CPQ, Experience Cloud, SAP integration, and AI-powered automation for a Germany-based pharmaceutical company with 500+ employees.



9+
Years of Partnership



500+
Employees Supported



5+
Salesforce Clouds Deployed



\$100M+
Annual Revenue Scale

Client Overview

A Germany-based global leader in pharmaceutical excipients and formulation solutions, supporting pharmaceutical companies and distributors worldwide. With 500+ employees and USD 100M+ in annual revenue, the company operates at scale across sales, formulation development, and partner-driven distribution models.

With complex formulation-driven sales cycles, strict confidentiality requirements, and a broad partner ecosystem, the company required a robust digital platform to manage customer engagement, distributor collaboration, commercial governance, and SAP-backed operational processes.

Key Business Characteristics:

- ✔ Global pharmaceutical excipients manufacturer with operations across multiple continents
- ✔ Complex formulation-driven sales cycles requiring confidentiality governance
- ✔ Extensive partner and distributor ecosystem requiring self-service collaboration
- ✔ SAP-backed operational processes needing bi-directional Salesforce integration
- ✔ Innovation-led business model with growing global footprint

Engagement Objective

We aimed to strengthen and scale the Salesforce ecosystem through targeted enhancements and adoption-focused initiatives. The primary objective was to enable end-to-end digitization of the opportunity, formulation, quoting, and order lifecycle while ensuring secure partner collaboration, seamless SAP integration, and improved decision-making through structured data and analytics.

Key Focus Areas:

- ✔ Simplifying opportunity creation and lead-to-opportunity conversion
- ✔ Supporting formulation development workflows with confidentiality and governance
- ✔ Enhancing CPQ accuracy, pricing control, and quote documentation
- ✔ Expanding partner and customer self-service through Experience Cloud
- ✔ Modernizing automation and introducing AI-assisted productivity features

Salesforce Ecosystem Snapshot



Strong focus on partner & customer collaboration, governed opportunity management, and SAP-backed operations.

Salesforce Solutions Implemented

Sales & Opportunity Enablement

- ✔ Custom Opportunity Creation component integrated with CLICK & DMS
- ✔ Guided Lead Conversion with automatic Account, Contact & Opportunity creation
- ✔ Opportunity Sharing Framework for controlled multi-distributor visibility
- ✔ Customer Action Plan for win strategies, deliverables, and timelines

Formulation & Innovation Support

- ✔ C2F (Concept-to-Formulation) solution for confidential, end-to-end formulation development
- ✔ Formulation Tool with expert-guided, standardized formulation design

CPQ & Commercial Governance

- ✔ Redesigned Quote Documents with enhanced pricing models
- ✔ Quote Validation for real-time business rule enforcement
- ✔ Price Rule Logging for troubleshooting and audit visibility
- ✔ Refactored QCP Scripts aligned to updated pricing logic

SAP & Digital Integration

- ✔ SAP Contract Integration with bi-directional sync
- ✔ SAP Sample Order Integration for seamless order tracking
- ✔ Website Lead Integration for faster sales follow-up

Platform Modernization & AI

- ✔ Migration from Workflow & Process Builder to Flow
- ✔ Agentforce AI for assisted creation of Opportunities, Quotes, Line Items, and Call Records

Pardot — B2B Marketing Automation

- ✔ Pardot (Account Engagement) implementation for B2B marketing automation
- ✔ Automated nurture campaigns aligned to formulation and product interest segments
- ✔ Lead scoring and grading to prioritise high-intent pharmaceutical prospects
- ✔ Engagement Studio journeys mapped to the pharma sales cycle
- ✔ Sales-marketing alignment with real-time prospect activity synced to Sales Cloud

Experience Cloud Portals

- ✔ Partner Community Portal for distributor self-service and collaboration
- ✔ Customer Community Portal for order processing and real-time order status tracking

Results & Impact

- ✔ **End-to-End Digitization:** Complete digitization of opportunity, formulation, quoting, and order lifecycle on Salesforce
- ✔ **9+ Year Trusted Partnership:** Long-standing partnership evolving from core sales system to business-critical ecosystem
- ✔ **SAP-Salesforce Unification:** Bi-directional integration enabling seamless contract and sample order processing
- ✔ **Partner Self-Service:** Distributor and customer portals enabling collaboration without manual intervention
- ✔ **AI-Powered Productivity:** Agentforce AI enabling assisted creation of Opportunities, Quotes, and Call Records
- ✔ **Governance & Compliance:** Confidentiality controls, pricing governance, and audit-ready logging across CPQ processes

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Let's discuss how we can help your pharmaceutical organization achieve similar results with a tailored Salesforce strategy.

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