



Birlasoft Salesforce Capabilities for Manufacturing Industry

Salesforce Powered Sales Lifecycle Transformation

Driving Lead → Quote → Contract Excellence for Manufacturing Enterprises

Delivering end-to-end digital selling transformation for manufacturing organizations across direct & indirect sales channels, configured product selling, pricing governance, and contract lifecycle.

Core Use Cases Delivered

Lead & Opportunity Lifecycle

- Marketing and digital lead capture
- Enterprise account opportunity management
- Territory and partner lead distribution
- Pipeline visibility and forecasting across direct and indirect sales

Configured Product Selling

- Configuration-driven quoting for custom engineered products
- Multi-product solution bundling
- Iterative quote revisions for evaluation cycles

Pricing, Commercial Governance & Deal Control

- Standard price list and contract price agreement management
- Volume and customer segment-based pricing
- Discount governance with delegated approval model

Quote → Order → Contract Orchestration

- Contract lifecycle tracking
- ERP order creation integration
- Order status visibility for sales teams
- Revenue and delivery milestone tracking for long fulfillment cycles

Key Client Engagements



- Simplified RFQ and lead-to-opportunity for a semiconductor manufacturing services company.
- Modernized CPQ for complex products for a global energy technology manufacturer.
- Streamlined quote-to-order with advanced CPQ for an industrial equipment manufacturer.
- Enabled dealer and distributor sales portals for a commercial vehicle manufacturer.
- Automated rebates and forecast tracking for an agro-chemical manufacturer.
- Enabled partner-led selling with CPQ for a transportation equipment manufacturer.

Platform Stack Specialization



End-to-End Aftermarket and Service Lifecycle Enablement

Driving Lifecycle Customer Value Through Connected Assets, Service, and Aftermarket Revenue

Enabling manufacturers to grow aftermarket revenue by linking product intelligence with service delivery and parts engagement to turn aftermarket service activities into renewals, upsell opportunities, and long-term customer retention.

Core Use Cases Delivered

Installed Base & Asset Lifecycle Management

- Customer equipment visibility across plants, sites, and regions
- Warranty, entitlement, and contract coverage validation
- Asset history including service events, upgrades, and replacements
- Installed base insights to identify service risk and support needs

Customer Service & Support Management

- Omnichannel service request capture
- Intelligent case routing based on product, entitlement, and severity
- Collaboration between service and sales teams
- Knowledge-based troubleshooting
- SLA tracking, escalations, and service performance monitoring

Field Service Execution & Technician Productivity

- Work order creation and lifecycle mgmt.
- Technician scheduling and dispatch based on skills and availability
- Mobile field service workflows for inspection, maintenance, and repairs
- Visibility into technician utilization and service backlog

Aftermarket Sales Management

- Preventive maintenance, service agreement management and service contract renewals
- Parts identification and recommendations during service activities
- Service offerings aligned to equipment lifecycle stages
- Service-to-sales handoff for renewals and upsell opportunities

Key Client Engagements



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- Transitioned distribution business unit from a separate Salesforce application to the global Salesforce platform to bring both on and off highway business in a single platform
- Standardized service and field operations for a transportation equipment manufacturer.
- Enabled WhatsApp-based service request intake and case management for an automotive (EV) components manufacturer.
- Automated field service dispatch and technician mobility for an automotive (EV) components manufacturer.
- Improved service automation alongside sales and CPQ for an industrial manufacturing conglomerate

Platform Stack
Specialization



SERVICEMAX



Agentforce

Agentforce Solutions Implemented



Dealer Portal Co-Pilot for German Manufacturer of Hardwood Flooring:



Solution Overview:

- AI-powered portal integrates with CRM, ERP for dealer support.
- Inventory views with AI recommendations powered with forecast demand by trends.
- Place and track orders, raise queries and enable self-service.

Business Value:

- ✓ Strengthen dealer relationships via tech-enabled platform.
- ✓ Enable data-driven production and market strategies.
- ✓ Faster fulfilment and alignment; standardized growth processes.

Intelligent Order Processing for Dealers of US-Based Portable Oxygen Solutions Manufacturer:



Solution Overview:

- Conversational assistant to simplify placing orders.
- Extracts order data from files uploaded (csv file, pdf, scanned docs, handwritten notes or email attachments) in chat.
- Identifies incorrect orders details & provides correct options and places orders.

Business Value:

- ✓ Simplified and faster order placement for improved dealer experience.
- ✓ Intelligent validation and recommendations minimize incorrect or incomplete order details

Sales Assistant for Major British Broadcasting Network:



Solution Overview:

- Agentforce assistant to provide Sales teams with an instant 360° view of customer records and actionable insights within the CRM system.
- Aggregates details such as pipeline info., forecast, insights etc. into a single view.
- Suggest Next-Best actions, meeting agendas & follow-ups to drive engagement.

Business Value:

- ✓ Improved sales productivity with AI powered insights and recommendations.
- ✓ Better forecast accuracy.
- ✓ Personalized and timely outreach for enhanced Customer Engagement.

Partner Enablement Agent for Global Retail Finance Company:



Solution Overview:

- Provide instant answers on products and offers.
- Deliver personalized upsell suggestions based on partner profile and usage.
- Recommend industry-specific products matching best-fit criteria.

Business Value:

- ✓ Instant access to product and offer details.
- ✓ Boost upselling with AI-driven suggestions.
- ✓ Drive revenue growth and loyalty through stronger partner relationships and higher product adoption

Thank You

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