



MANUFACTURING OPERATIONS MODERNIZATION CASE STUDY

Optimizing Sales, Service and Supply Chain with
Unified CRM Solutions



ABOUT THE ORGANIZATION



- **Mission / Focus Area:** A manufacturing company focused on delivering high-quality industrial products, improving operational efficiency and building strong customer relationships through innovation.
- **Size of Organization:** Mid-sized firm with 250–500 employees, operating across multiple regions with a growing domestic and international presence.
- **Key Programs:** Production and inventory management, dealer and distributor management, after-sales service, sales pipeline tracking and customer relationship management.
- **Tech Stack Before Implementation:** Relied on tools like Microsoft Excel, Tally and Microsoft Outlook, along with manual reporting systems, resulting in data silos and limited visibility.

CHALLENGES

- **Fragmented Sales & Long Deal Cycles:-** Poor visibility, manual agreements and slow approvals delay deal closures and reduce revenue speed.
- **Inefficient Service & Customer Support:-** Lack of centralized service tracking, AMC management and slow issue resolution harms customer satisfaction.
- **Unoptimized Inventory & Supply Chain:-** Inaccurate forecasting, stock mismanagement and weak coordination cause delays and increase operational costs.
- **Weak Dealer & Procurement Management:-** Limited dealer visibility, poor order tracking and complex purchase processes reduce efficiency and control.

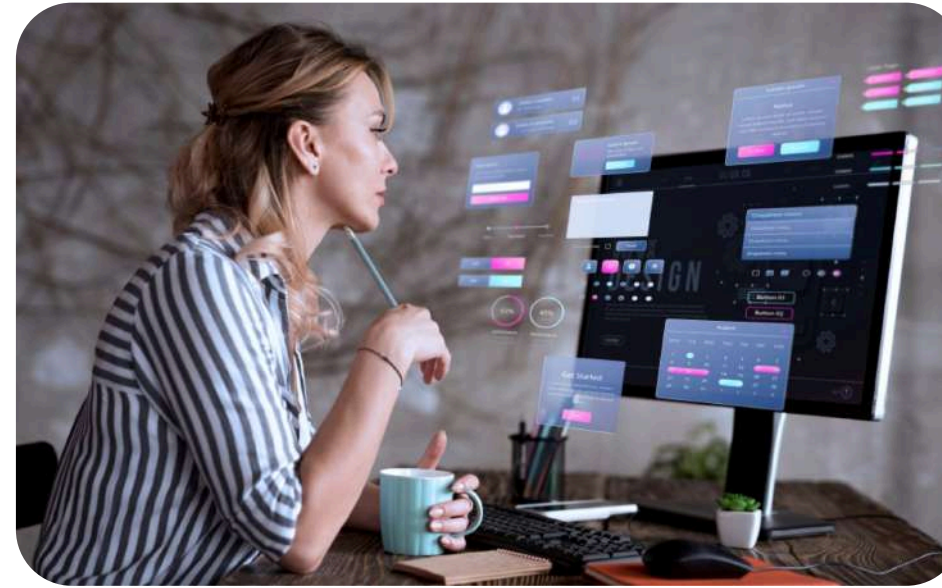


SOLUTION



End-to-End Sales & Agreement Automation

Manage Enquiry, opportunities and digital sales agreements with automated approvals.



Integrated Service Management System

Centralize service requests, AMC tracking and technician scheduling for faster and more efficient customer support.



ERP-Integrated Inventory with Payment Enablement

Real-time inventory sync with ERP, integrated with payment gateway and banking systems.



Optimized Purchase & Procurement Flow

Automate purchase requests, approvals and vendor tracking to reduce delays and improve supply chain efficiency.



Dealer & Distributor Management

Monitor dealer performance, orders, and incentives in one system to strengthen channel sales and control.



Partner Portal for Self-Service

Empower dealers and partners to place orders, track status and raise requests independently through a unified portal.

IMPLEMENTATION APPROACH



Discovery & Requirements

Conduct stakeholder workshops to identify business challenges, gather requirements and define the implementation roadmap.



System Configuration

Configured Sales Cloud and Service Cloud with lead-to-opportunity flow, dealer management, case handling, automation and dashboards to streamline operations and improve decision-making.



Integration

Integrate with email, payment and marketing systems while enabling mobile access for field teams.



Data Migration

Clean, map and migrate legacy customer and sales data to ensure a unified and accurate data source.



User Training & Go-Live

Train users, perform final testing and launch the system with initial post-implementation support.

KEY FEATURES DELIVERED



- **End-to-End Process Visibility:-** Unified system connecting sales, service, inventory and procurement with real-time tracking.
- **Automation of Critical Workflows:-** Automated sales agreement approvals, pricing approvals, purchase request approvals and service ticket assignment workflows.
- **Dealer & Distributor Management:-** Centralized dashboards for sales, dealer performance, inventory and procurement insights.
- **Connected Partner Ecosystem:-** Self-service portal for dealers to place orders, track status and raise requests.
- **Revenue Acceleration & Cost Optimization:-** Faster sales cycles, optimized inventory and efficient procurement reduce delays and wastage.

RESULTS

- **30–40% Faster Sales Cycle:-** Automated approvals and digital agreements significantly reduce deal closure time.
- **25–35% Improvement in Service Efficiency:-** Centralized service management enables quicker issue resolution and better customer satisfaction.
- **20–30% Reduction in Inventory Costs:-** Real-time visibility and demand planning minimize overstocking and stockouts.
- **15–25% Increase in Dealer Performance:-** Better tracking, transparency and incentive management drive higher channel sales.
- **20–30% Boost in Overall Operational Efficiency:-** End-to-end automation reduces manual work, errors and process delays across departments.





CONTACT US

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