Sales Automobile Using Salesforce CRM

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Project title : Sales automobile using Salesforce CRM

Overview

A Salesforce CRM project in the automobile industry focuses on streamlining and optimizing the end-to-end sales process, from lead generation to post-sale customer engagement. By leveraging Salesforce's capabilities, dealerships can improve efficiency, provide a personalized customer experience, and achieve higher sales performance.This project ensures that automobile sales teams can deliver a modern, customer-focused sales experience while achieving higher operational efficiency and profitability.

Objectives

- **Enhance Customer Experience:** Improve customer satisfaction and retention through better engagement and personalized experiences
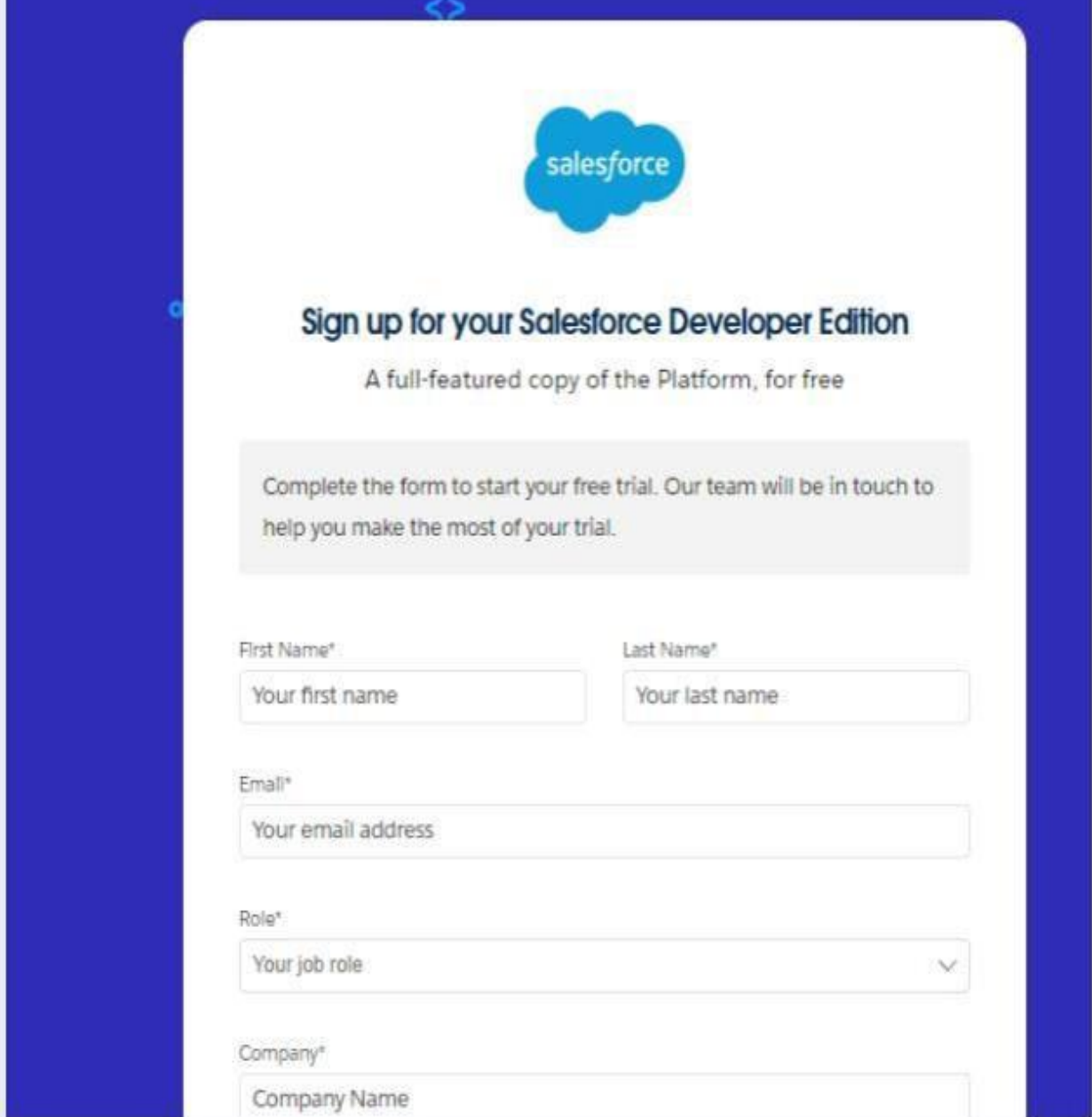
- **Streamline Sales Processes:** Automate and optimize sales processes to increase efficiency.
- **Lead Management:** Track leads from various sources and improve the lead conversion rate.
- **Data-Driven Decisions:** Use insights from data to make informed business decisions, forecast sale ConversionCapture and Nurture Leads: s, and set KPIs.
- **Increase Conversion Rates:** Streamline the lead-to-sale journey with targeted strategies to improve conversion rates.
- **Enhance Customer Experience and Engagement:**Personalized Customer Interactions: Use customer insights to personalize interactions, offers, and follow-ups.
- **360DegreeCustomerView**:Provide sales reps with a comprehensive view of each customer's history, preferences, and past interaction .
- **Automate Repetitive Tasks:** Reduce manual effort with automated reminders, follow-ups, quote generation, and proposal management.
- **Optimize Opportunity Management:** Implement structured sales stages for automobile sales (e.g., inquiry, test drive, negotiation) to guide sales reps and close deals faster.
- **Ensure Scalability and Flexibility:**Scalable Processes: Design processes that can grow with the dealership, acc(websites,ommodating additional locations, vehicles, and customer

Salesforce key features

- **Lead and Opportunity Management:**Capture leads from multiple.sources(socialmedia,events).Automated lead assignment to sales representatives.Track opportunities throughout the sales cycle, from inquiry to deal closure.
- **Test Drive Scheduling:**Schedule test drives efficiently with automated reminders and location tracking.Collect feedback post-test drive to assess customer interest.
- **Inventory Management:**Track vehicle availability and location in real time.Showcase vehicle options, configurations, and features directly from the system.
- **Quotation and Deal Management:**Generate detailed, customized quotes, including financing and insurance options.Automate contract generation and streamline deal closure processes.
- **Marketing Automation:**Execute targeted campaigns for car launches, promotions, and events.Personalized communication via email, SMS, and social media.

Sales to solution design

1)creating developer org in   Salesforce : enter details for sign up in Salesforce .
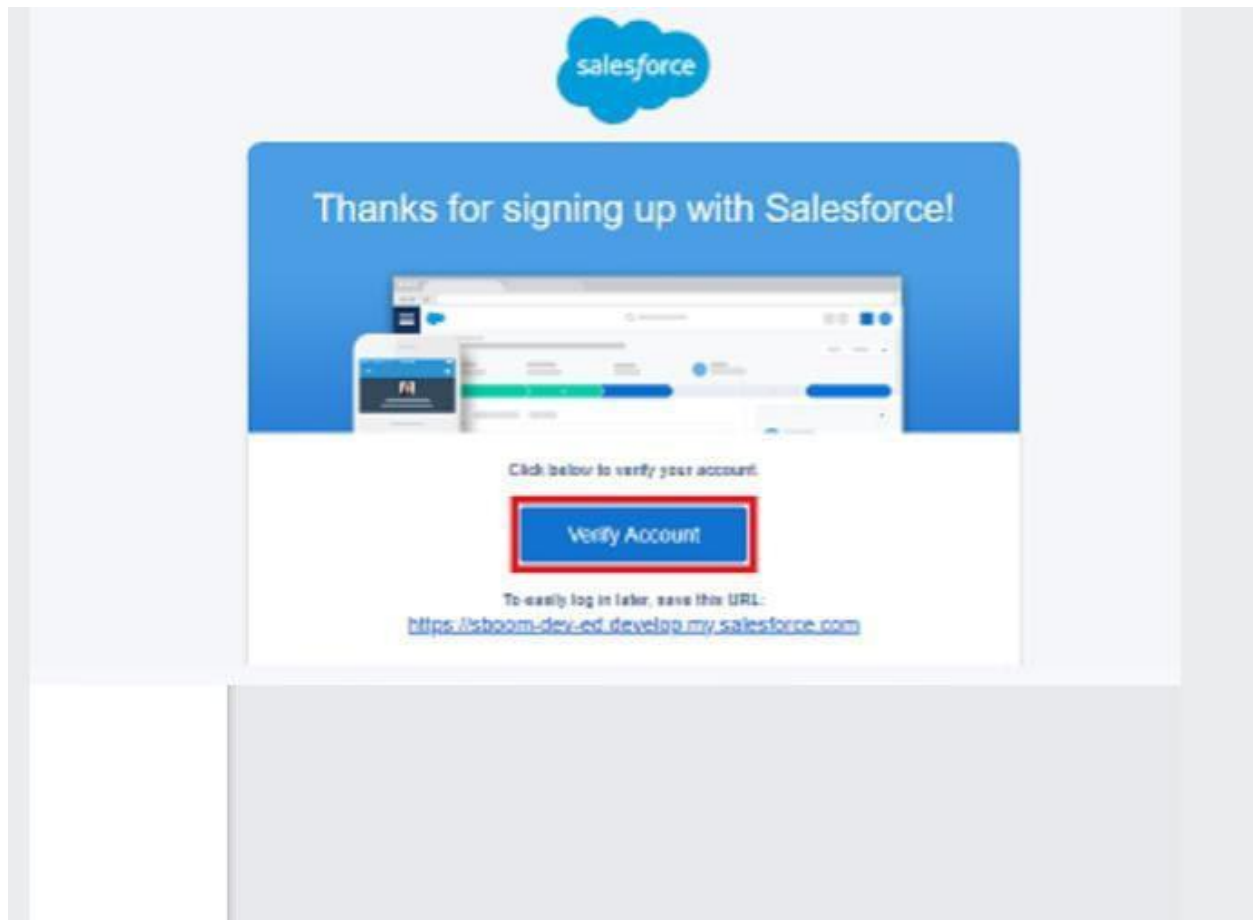
2) Account activation : Go to the inbox of the email that you used while signing up.click on the verify account to activate your account .

3) you will get the set up page after verify your account in Salesforce sign in.

4) create automobile object: the purpose of creating a automobile custom object is to store and manage information about invoice.

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templa

Label	Opportunity Automobile	Example:
Plural Label	Opportunity Automobiles	Example:
Starts with vowel sound	☐	

The Object Name is used when referencing the object via the API.

Object Name	Opportunity_Automobile	Example:

Description

Context-Sensitive Help Setting ⦿ Open the standard Salesforce.com Help &
○ Open a window using a Visualforce page

Content Name   --None-- ⌄

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For exampl

Record Name	Opportunity Automobile Id	Example:

Data Type	Auto Number ⌄	
Display Format	OA-{0000}	Example:
Starting Number	1	

5) creating a custom tab: go to the set up page .type tabs in quick find bar new under custom object tab.

Custom Tabs

You can create new custom tabs to extend Salesforce function

Custom Object tabs look and behave like the standard tabs pro allow you to embed Visualforce pages. Lightning Component ta you to add Lightning Pages to Lightning Experience and the m

Custom Object Tabs

No Custom Object Tabs have been defined

Web Tabs

No Web Tabs have been defined
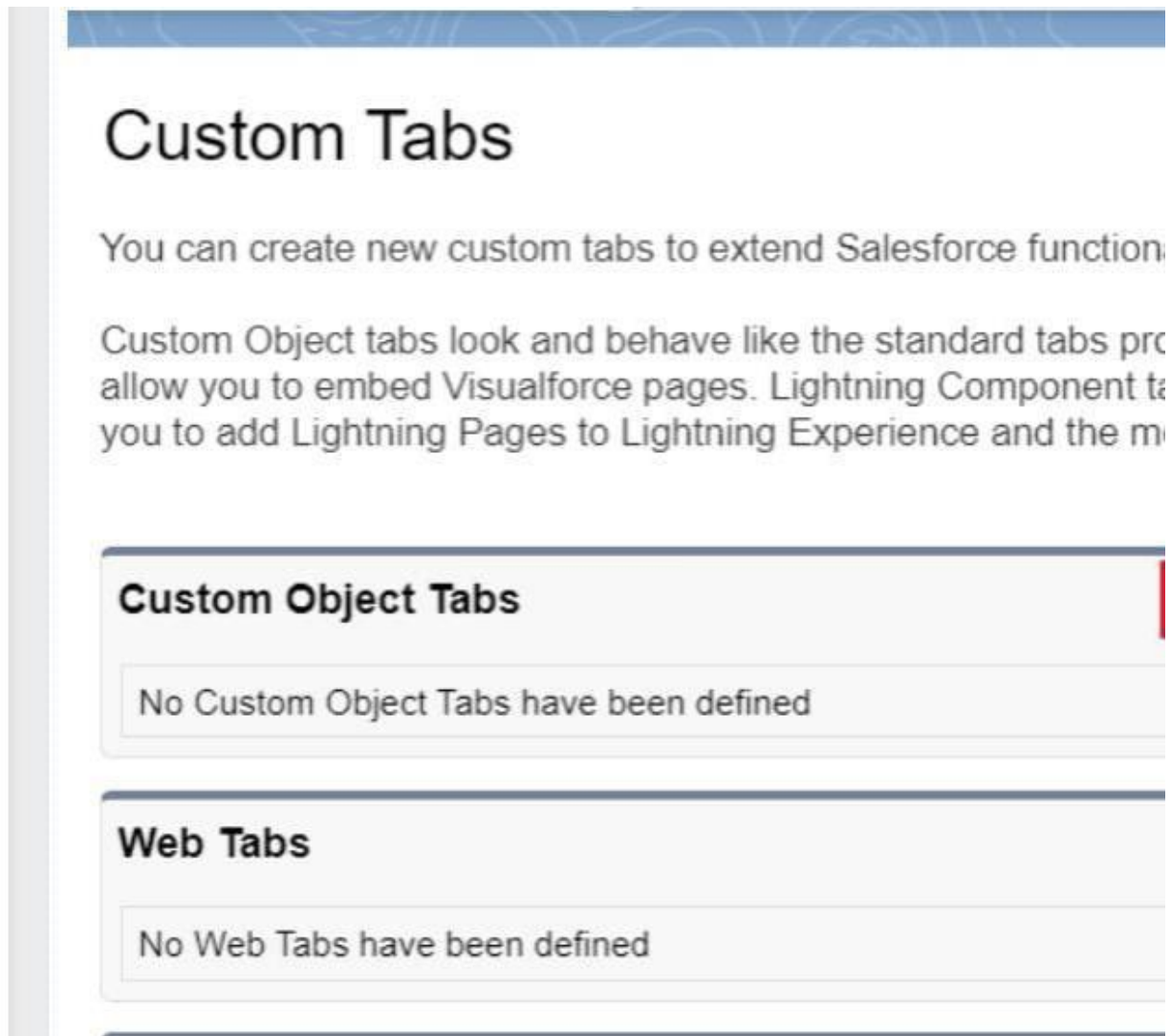
6) **creating a lightning app :** go to setup page ,search app manager in quick find select app manager click on new lightning app.

7) **field and relationship:** field represent the data stored in the column of a relational database can hold any valuable information that you require for a specific object in the overall searching, deletion and edition of the record become simple and Quick.

8) **page layout**: layout in sales force allow us to customise the design and organise detail and edit pages of records in sales force layout can be used to control the appearance of fields related list and customer link and standard and customer object details and edit pages.
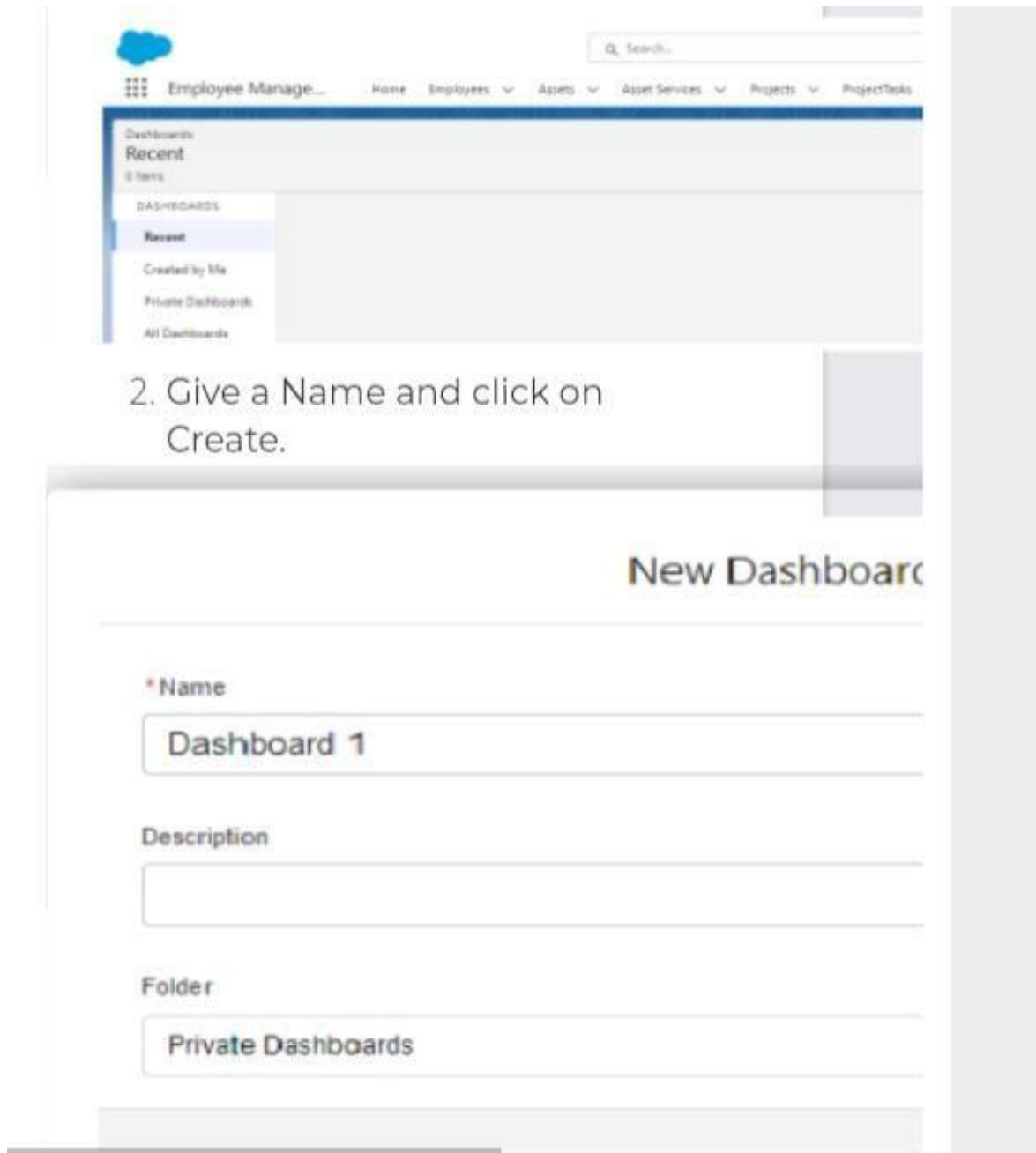
9)**appex trigger:** Apex can be invoked by using triggers. Apex trigger enable you to perform custom action before or after change to safe force record such as insertion updates of delicious that execute before or after the operations insertion, update, deletion.

10)**LWC components:** login to the respective account and navigate to the dear icon in the top right corner click on the developer console now you will see a new console window.

11) **appex schedulers:** the Apex scheduler let's you delay execution so that you can run Apex classes at the specified times. this is ideal for daily or weekly maintenance task using that appex.

12) **Reports:** reports give you access to your Salesforce data .you can examine yourself force that are in almost infinite combination display it in easy to understand format and share the resulting inside with others.

13) Dashboard: Salesforce dashboard help you visually understand changing business. condition so you can make decision based on real time data you have gather the with reports.

2. Give a Name and click on Create.

New Dashboard

*Name

Dashboard 1

Description

Folder

Private Dashboards
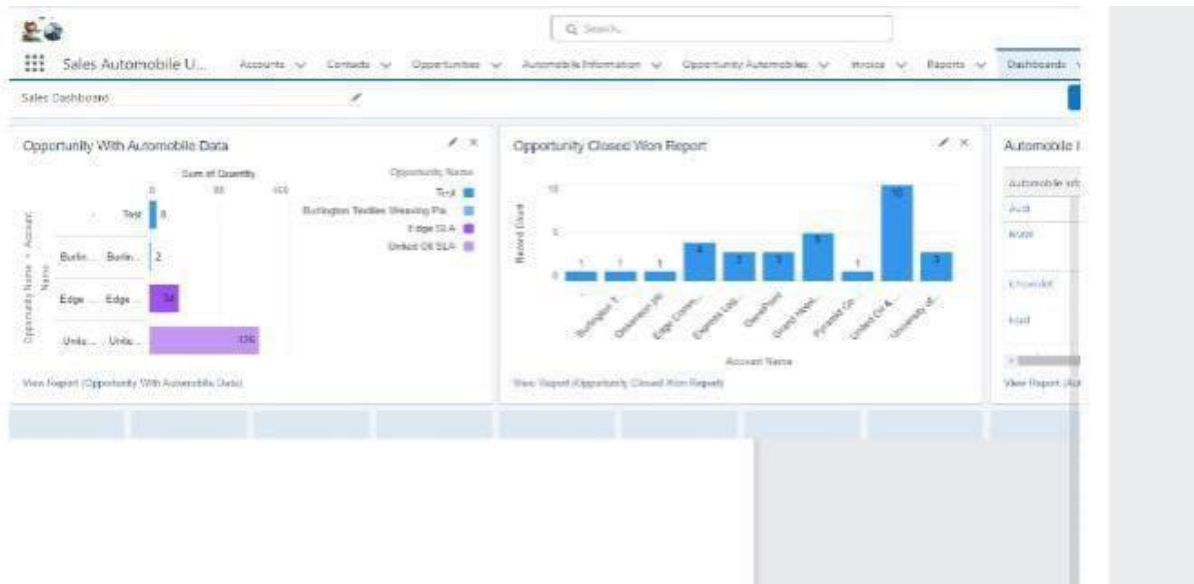
Scenario: Lead-to-Customer Journey for Automobile Purchase

- **Source**: A potential customer (lead) fills out an online form on the dealership's website, expressing interest in a specific car model.
- **Lead Capture**: The form automatically populates the lead's details (name, contact information, vehicle interest, etc.) in Salesforce via Web-to-Lead.
- **Lead Assignment**: Based on the lead's location and interest, Salesforce assigns the lead to a specific salesperson using lead integration.
- **Initial Contact**: The salesperson contacts the lead to understand their requirements (e.g., budget, preferences, and financing needs).
- **Lead Status Update:** The salesperson updates the lead status to "Qualified" after confirming genuine interest.
- **Opportunity Setup:** The lead is converted into an opportunity with specific details, such as the car model, potential revenue, and expected close date.
- **Test Drive Scheduling**: Salesforce tasks are created to arrange a test drive. Automated email and SMS reminders are sent to the customer.
- **Customization Options:** The salesperson records customer preferences (e.g., color, accessories, and financing options) directly in the opportunity record.
- **Vehicle Delivery:** Salesforce tracks delivery status and sends confirmation emails to the customer.
- **Service Reminders:** Salesforce schedules future reminders for maintenance, warranty checks, or service packages.

- **Feedback Collection:** The customer receives a post-purchase survey to rate their experience.
- **Sales Performance Tracking**: Dashboards monitor key metrics such as sales volume, conversion rates, and average deal size.
- **Customer Insights:** Data collected helps the dealership identify upsell or cross-sell opportunities, such as promoting extended warranties or accessories.

CONCLUSION

- Implementing Salesforce CRM in an automobile sales project can yield several significant achievements, including improved efficiency, customer satisfaction, and business growth.A structured sales pipeline in Salesforce improved visibility and ensured seamless movement through stages like lead qualification, test drive scheduling, and deal closing.
- Salesforce CPQ enabled quick and accurate quote generation.Automated approval workflows reduced turnaround times, speeding up deal closure.Data insights helped identify patterns and trends for upselling accessories, extended warranties, or service packages.Automated marketing campaigns targeted existing customers with trade-in offers or promotions on new models.
- Automation freed up time for sales reps to focus on high-value activities like customer interactions.Mobile access to Salesforce enabled productivity on the go, especially during test drives and showroom visits.Post-sale engagement features like service reminders and satisfaction surveys improved customer loyalty.
- Loyalty programs managed in Salesforce encouraged repeat purchases and referrals.These achievements demonstrate how Salesforce CRM can transform an automobile sales process, driving efficiency, profitability, and long-term customer relationships.
- Salesforce ensured proper data management, documentation, and audit trails for regulatory compliance.Mobile access to Salesforce enabled productivity on the go, especially during test drives and showroom visits.
- Data insights helped identify patterns and trends for upselling accessories, extended warranties, or service packages.Automated marketing campaigns targeted existing customers with trade-in offers or promotions on new models.