Phase 4: Process Automation (Admin)

Introduction

After building the core data model in Phase 3, the next challenge was to reduce manual work for dealership staff and sales administrators. In traditional dealership operations, employees spent significant time on repetitive tasks such as updating order statuses, calling customers for test drive reminders, and checking vehicle stock. These tasks were prone to errors and consumed valuable time that could otherwise be spent on sales and customer engagement.

To address this, Salesforce's declarative automation tools—including Flows, Process Builder, and Workflow Rules—were leveraged. By automating critical processes, AutoFlow CRM drastically reduced the dependency on manual interventions, resulting in faster service, fewer errors, and enhanced customer satisfaction.

Key Automations Implemented

1. **Order Lifecycle Automation**
    - **Orders in AutoFlow CRM passed through different stages: Requested → Booked → Confirmed → Delivered.**
    - **Using Salesforce Flows, the system automatically updated the order status as actions were completed (e.g., confirmation by dealership, delivery of vehicle).**
    - **This eliminated the need for staff to manually change order statuses in the system.**
2. **Test Drive Scheduling & Notifications**
    - **When a test drive was scheduled, the system automatically sent SMS and email notifications to both the customer and the assigned technician.**
    - **Reminder notifications were sent before the scheduled time, reducing missed appointments.**
3. **Stock Validation Rules**
    - **Automations prevented customers from booking vehicles that were out of stock.**
    - **If a requested vehicle was unavailable, the system prompted sales executives to suggest alternative models or variants.**
4. **Lead Assignment Rules**
    - **New leads (buyer inquiries) were automatically routed to the appropriate dealership based on the buyer's location.**
    - **Within a dealership, assignment rules ensured leads were fairly distributed among sales executives.**
5. **Follow-Up Tasks**

- Workflow rules created automatic follow-up tasks for sales staff after test drives, ensuring consistent engagement with potential buyers.

Tools Used

- **Workflow Rules: Used for simple automation like sending notifications and creating tasks.**
- **Process Builder: Designed for multi-step logic, such as updating related records when order status changed.**
- **Salesforce Flows: Implemented for complex automation, like handling order lifecycle progression and validating stock across dealerships.**

By combining these tools, AutoFlow CRM balanced ease of use with powerful automation.

Challenges During Automation

1. **Overlapping Logic**
   Initially, there was a risk of workflows and processes overlapping, causing duplicate notifications or conflicting updates. This was resolved by consolidating logic into Flows and deactivating redundant rules.
2. **Scalability of Flows**
   Complex flows with multiple branches risked performance issues as the system scaled. The team optimized flows by modularizing them into smaller, reusable components.
3. **User Training**
   Dealership staff had to be trained to understand how automated processes worked, especially in cases where the system restricted bookings or enforced rules.

Impact of Automation

The benefits of automation were significant:

- **60% Reduction in Manual Communication: Customers received automated SMS/email updates without dealership staff needing to call frequently.**
- **Faster Order Processing: Automated order lifecycle updates minimized delays.**
- **Improved Accuracy: Stock validation rules ensured only available vehicles were booked.**
- **Better Customer Experience: Customers felt more engaged with timely updates and reminders.**
- **Increased Staff Productivity: Employees could focus on selling and customer relationships instead of administrative tasks.**

Example Scenario

- **A customer submits a request for a test drive of a new car.**

- **The system checks availability of the vehicle at the nearest dealership.**
- **If available, the test drive is automatically scheduled and notifications are sent to both the customer and the technician.**
- **A follow-up task is automatically created for the sales executive to contact the customer post-drive.**

This seamless workflow eliminated the multiple manual calls and confirmations previously required.