CG Sales & Service : Salesforce Implementation for Retail & Supply Chain Optimization

Phase 1: Problem Understanding & Industry Analysis

Problem Statement

CG Power and Industrial Solutions Limited (formerly Crompton Greaves) is an Indian multinational in power generation, transmission, and distribution. The company manages **SMB sales** for products like **Internet, TV, Voice, and SmartOffice Cameras**.

The project used **Agile** and focused on **Salesforce setup, data management, deployments, and support**.

A **Salesforce-based Sales & Service solution** was implemented to **streamline SMB sales operations, improve efficiency, and support effective service management**.

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1. Requirement Gathering

- Conducted multiple **user story grooming sessions** with business stakeholders.

- Identified key requirements around **Sales activity tracking, Customer 360, Data management, and Deployment automation**.

- Captured functional needs such as **lead-to-opportunity conversion**, **LOB-based sales categorization**, and **smart office product sales enablement**.

- Technical requirements included **Lightning component development, Git integration for deployment, and sandbox management**.

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2. Stakeholder Analysis

- **Salesforce Administrator/Developer** – Handles configuration, customization, data management, and release tasks.

- **Release Manager/Deployment Team** – Prepares XMLs, manages deployments, and supports production releases.

- **Project Team (Agile)** – Participates in user story grooming, sprint planning, and spike design.

- **End Users (CG SMB Sales Team)** – Use the system for managing sales across LOBs (Internet, TV, Voice, SmartOffice Cameras).

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3. Business Process Mapping

- **Sales Activities**: Managing SMB sales for Internet, TV, Voice, and SmartOffice Cameras.

- **Agile Development**: User story grooming, sprint planning, spike design, and onsite/office agile model.

- **Configuration & Customization**: Salesforce changes for business requirements.

- **Data & Release Management**: Data handling, XML preparation, sandbox testing, and production deployments.

- **Support**: Issue fixes in all sandbox environments and production.

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4. Industry-specific Use Case Analysis

- **Retail & Supply Chain**: Managing SMB sales processes aligned with retail workflows.

- **Telecom & Smart Solutions**: Sales and support for Internet, TV, Voice, and SmartOffice Camera products.

- **Agile Delivery**: Faster delivery through sprints, spike design exploration, and continuous deployment.

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5. AppExchange Exploration

- Used deployment and data management tools to support release activities.

- Evaluated standard Salesforce features for sales enablement and service support.