SALES CLOUD CASE STUDY

Use Case 01

Major Challenges	Scope Of Project	Outcome
Not able to manage their leads from different source for e.g., (Facebook, twitter, India Mart etc.)	Integrated third party lead generation tools with salesforce.	All leads are presented there on one platform with realistic data
There was no transparency between regional sales manager to sales representative.	Implemented sales target and attendance feature	Real-time sync of all the objects data is done
Not able to track and store their employee's attendance	Delivered high-quality solution to check the communication done with the customer and also track their employee's performance.	Effectively manage the tracking and tour plane of employees.
Not able to track one's performance and targets	Effective management of Cases and on time resolution	Synced all the real time data from SAP and tally to salesforce.
Not able to view the inventory statistics in one platform from different sources (SAP and Tally)	Integrated SAP and Tally with salesforce to view the Product value in the system	Transparency between RSM and SR.

Use Case 02

Major Challenges	Scope Of Project	Outcome
Unstructured sales process	Created few custom objects and fields	Increase productivity 30% in 4 months.
Not able to track the Customer status.	Configure lead duplicity and assignment rules in the system	Transparency between SR and managers
Not able to properly assign their leads to respective sales representatives	Set up role and hierarchy for each user	Managed opportunity process.
Not able to calculate their KPIs	Set up different permission set to different roles and profile	Increase efficiency.
Unmanaged opportunity process	Created Analytical Report and Dashboards	Easily synced data with salesforce

Cloud Certitude

Major Challenges	Scope Of Project	Outcome
Not able to manage huge of amount of data of Customers and Products	Created Approval process (manual and automatic) according to the role of user	Approval processes ensure that process has more transparency.
Manual approvals were taking up a lot of time and were delaying the complete process of the sales cycle.	Reminder notification of set to remind the users of the deadlines.	Automatic email notifications ensured no delay in notifying customers of the work progress.
Tracking the work progress was difficult, we were not able to set deadlines and work reminders.	Custom pages were developed to reduce the manual work.	Quote and technical documents can we prepared with different formats in comparatively less time and with more efficiency
We're using the excel to create Quotations and Technical Documents which were Pron to error and consuming time.	VF pages were used to create Quotation and Technical Documents which were taking dynamic values	With the help of a high-tech dashboard and reports, the manager will be able to take the right decision at the right time.
We're not able to track the work process of their subordinates.	Created reports to track the progress of Technical Team Members.	