

Salesforce Implementation Use Cases for Manufacturing



Disjointed Customer Experience



Fragmented Systems

B2B manufacturers often rely on multiple systems for customer interactions, leading to a fragmented experience.



Lack of Centralized Data

Limited access to customer information across departments hampers service and support.



Inefficient Communication

Inconsistencies in communication channels create confusion and delays.



Lack of Visibility into Sales Pipeline

1 Limited Insight

Without a clear view of the sales pipeline, it is difficult to track progress and make informed decisions.

2 Delayed Responses

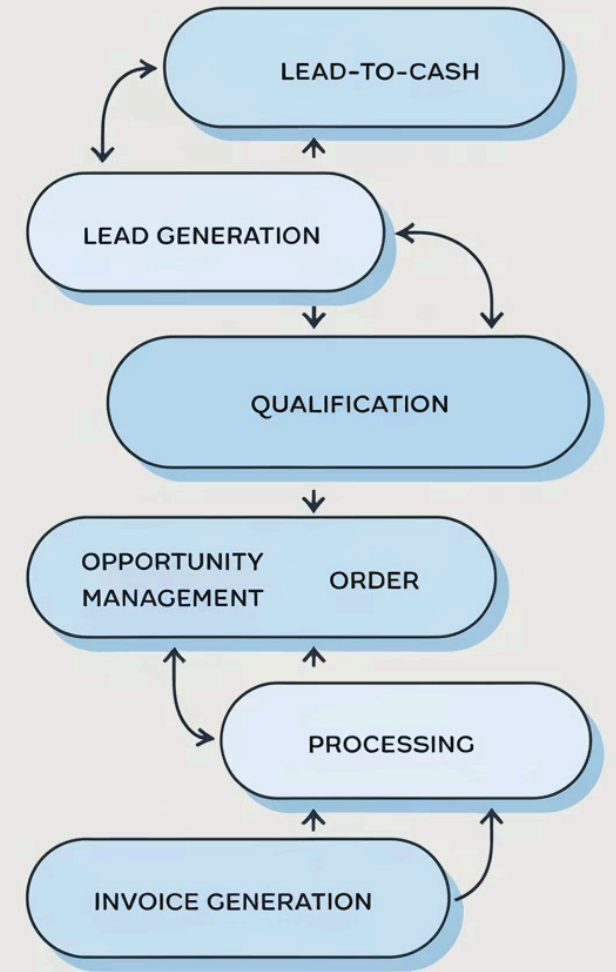
The inability to assess the sales pipeline in real-time leads to delays in responding to opportunities and potential customers.

3 Missed Opportunities

A lack of visibility into sales pipeline can result in missed opportunities and lost revenue.

Salesforce Solution Kritis Industries(Export): Streamlining Lead-to-Cash Process

A Salesforce implementation can dramatically enhance B2B manufacturers' lead-to-cash processes, improving efficiency and profitability.



Implementing Lead Management

1

Centralized Database

Establish a central database to capture all lead information, including contact details, industry, and company size.

2

Lead Qualification Process

Implement a robust qualification process to identify qualified leads based on predetermined criteria.

3

Automated Lead Scoring

Develop a lead scoring system that assigns points based on lead interactions and engagement.

4

Lead Routing and Assignment

Automatically route leads to the appropriate sales representatives based on their expertise and territory.

Automating Opportunity Workflow

1 Initial Contact

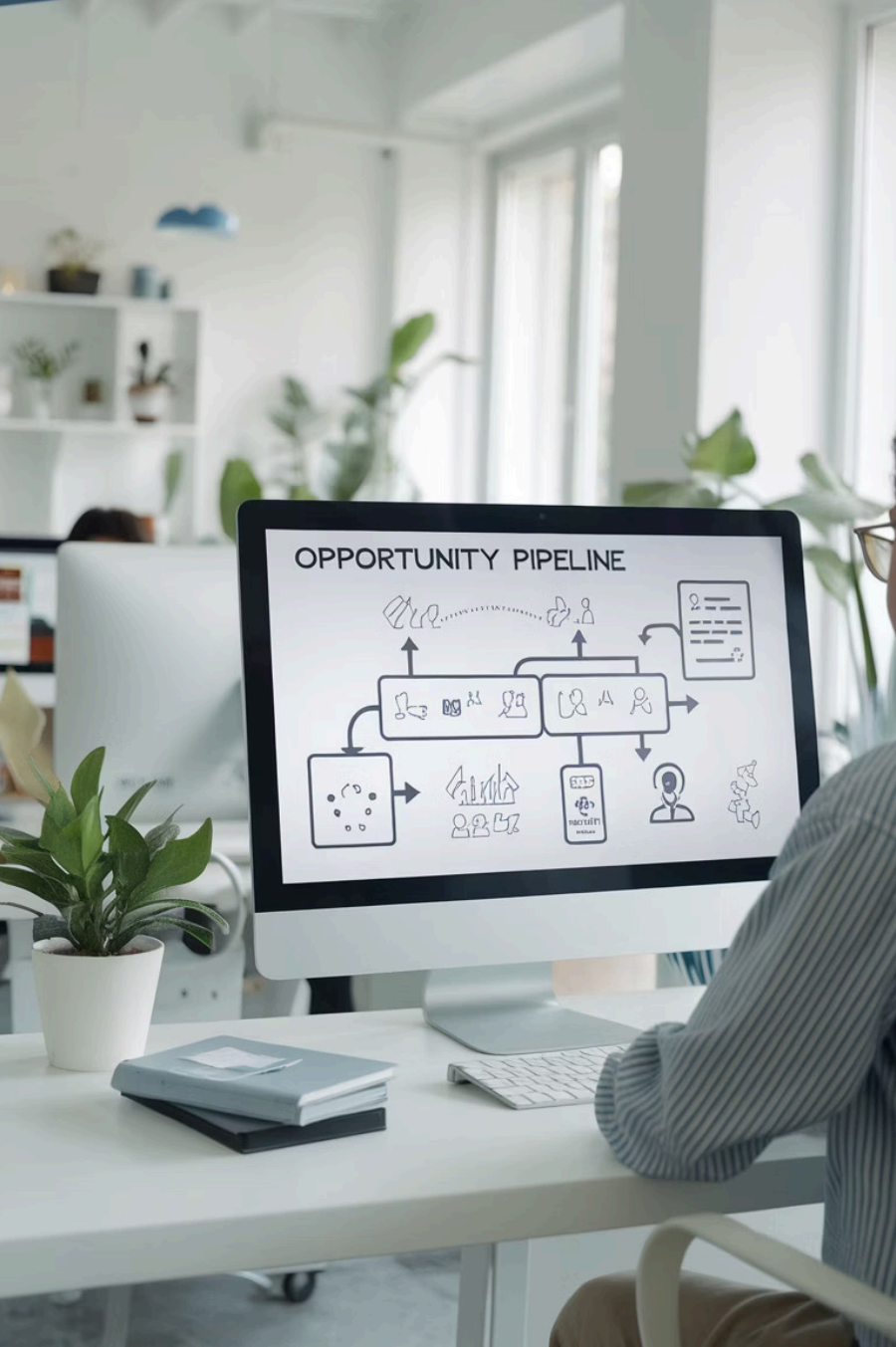
When a new lead is qualified, an opportunity record is created, and the sales representative is assigned.

2 Opportunity Stages

Opportunity stages, such as "Qualification," "Proposal," and "Negotiation," are defined, each triggering specific actions.

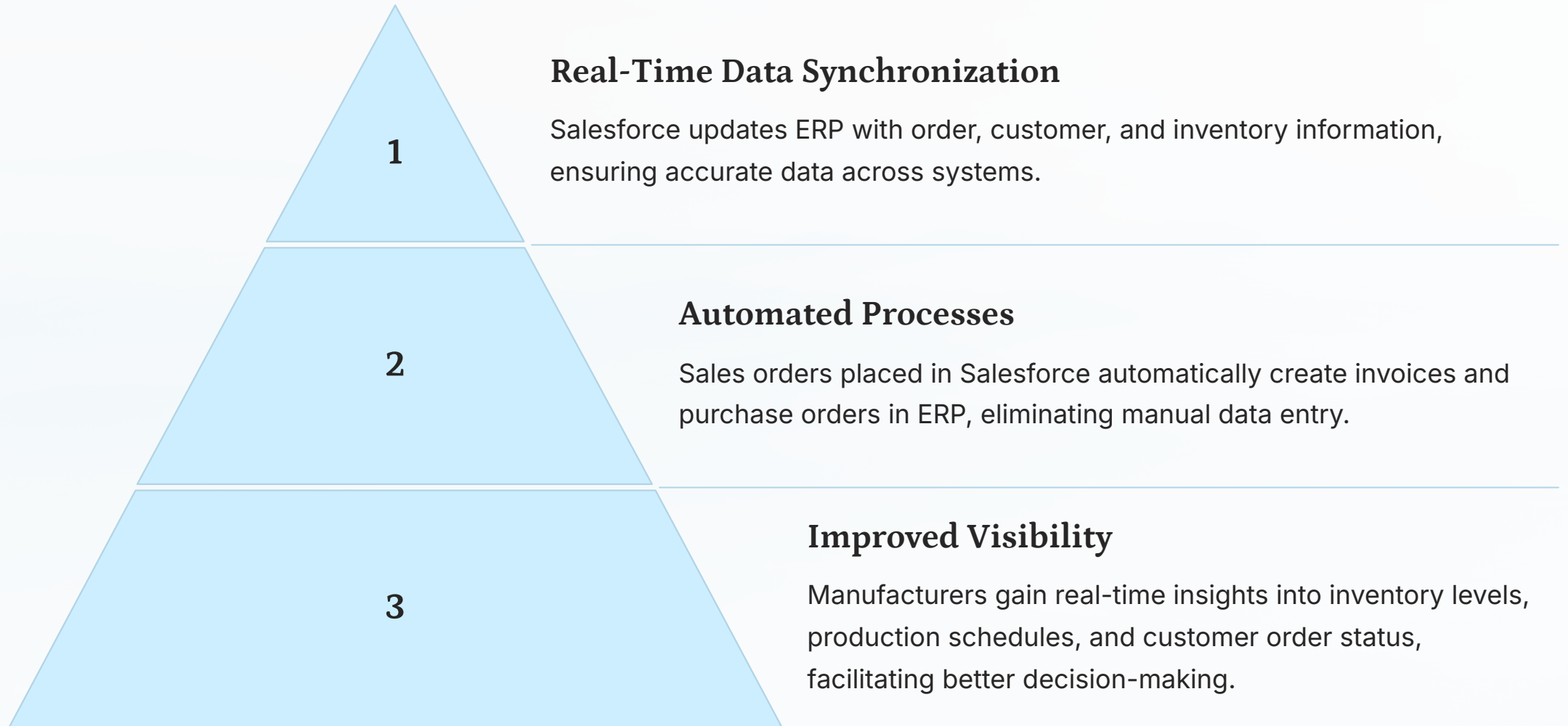
3 Automatic Updates

As the opportunity progresses, the system automatically updates fields, sends notifications, and escalates tasks.



Integrating with ERP System

Integrating Salesforce with an ERP system for B2B manufacturers streamlines operations.



Salesforce Solution for AGI MillTech : Enhancing Customer Engagement

1

Deploy Community Cloud for Customers

Give customers a secure, branded portal to access information.

2

Enable Self-Service Support

Let customers find answers themselves through knowledge bases and FAQs.

3

Consolidate Customer Data

Create a single view of customers across all channels.

4

Drive Deeper Insights

Gain insights from customer interactions to improve product and services.

By leveraging Salesforce Community Cloud, B2B manufacturers can provide a personalized and seamless experience for their customers, enhancing engagement and loyalty.

Deploying Community Cloud for Customers

Community Cloud offers a powerful platform to engage with B2B manufacturing customers.

Enable self-service support, foster collaboration, and access valuable customer insights.



Enabling Self-Service Support

1

Knowledge Base

A centralized repository of FAQs, articles, and tutorials.

2

Online Forums

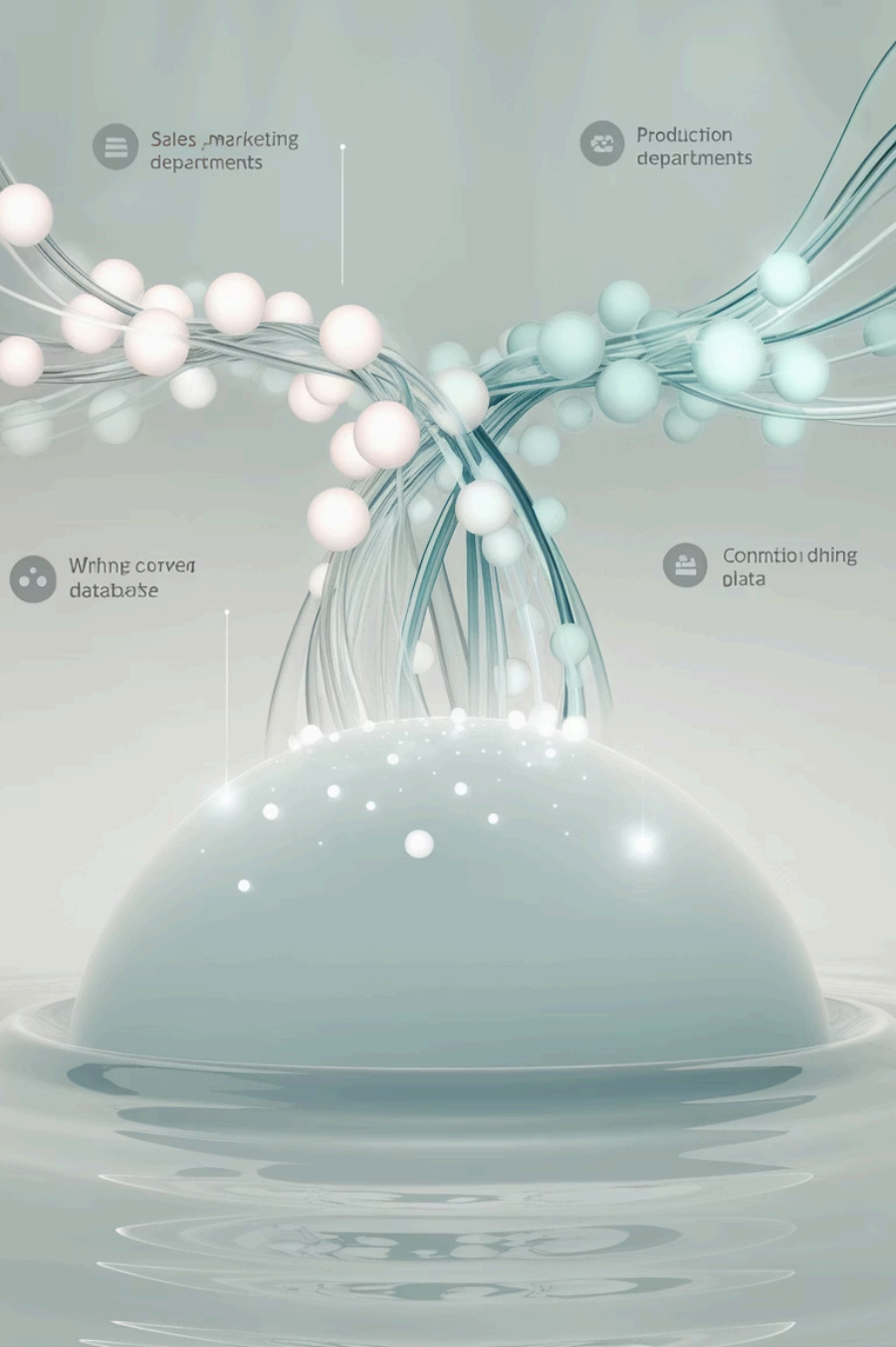
A platform for customers to connect and share solutions.

3

Live Chat

Real-time assistance with quick answers to immediate questions.

By empowering customers with self-service resources, they can find the information they need quickly and efficiently.



Consolidating Customer Data

1

Centralized Database

Salesforce provides a single source of truth for customer information.

2

Data Integration

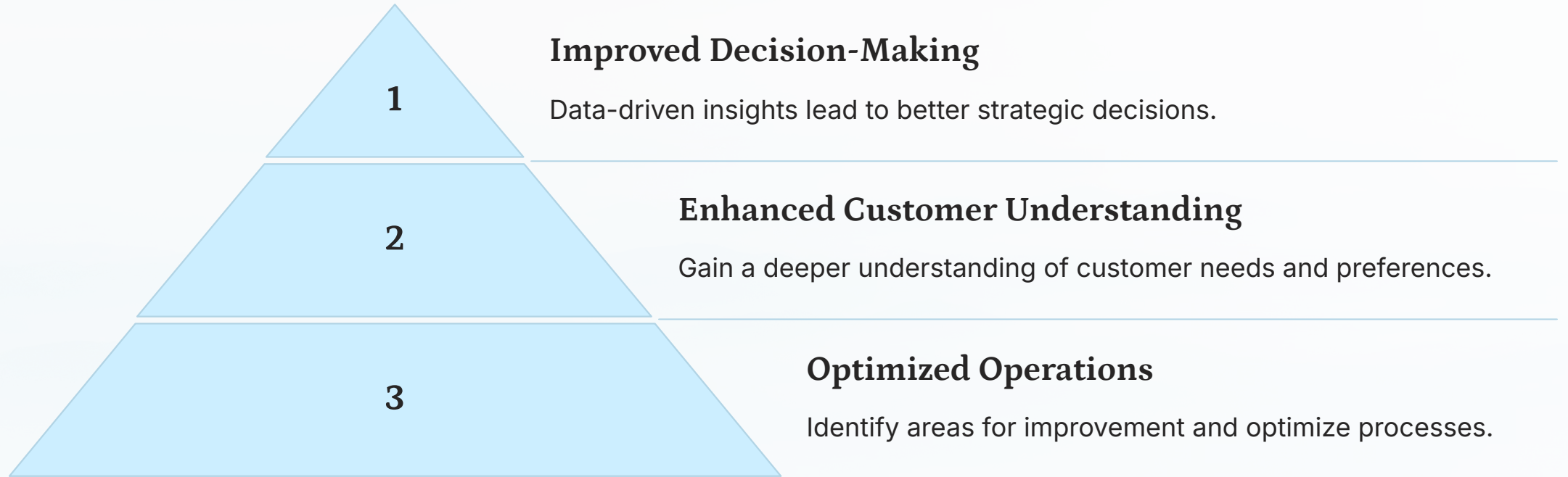
Integrate with existing ERP and CRM systems to ensure comprehensive data.

3

Data Enrichment

Leverage Salesforce's data management tools to enhance customer profiles.

Driving Deeper Insights



Salesforce provides valuable insights into sales performance, customer behavior, and operational efficiency. Manufacturers can use this data to identify trends, predict future outcomes, and improve decision-making.