



# 44% Improvement in Sales Productivity with Lead-to-Quote Automation using Salesforce for a Chemical Manufacturer

## Insight

A well known specialty chemicals manufacturer for the paper and paperboard industries used to oversee the entirety of their sales cycle manually. In order to track and analyze their everyday business activities, they needed a system that could monitor such tasks as tracking inquiries, customers, and customer assets (machinery, chemicals, and machine defects).

Forsys and Salesforce collaborated to implement a solution that facilitated the client's ability to manage their lead-to-quote process and make their sales & service processes efficient by keeping an eye on the customer's journey and improving product quality with defect management. As a result of deploying Sales Cloud, the client experienced a 44% rise in sales productivity and a 37% increase in win rate.



**Industry**  
Chemical Manufacturing

**Revenue**  
12+ M

**Employees**  
100+

**Headquarters**  
Karnataka, India

## Business Challenge

Running a growing business swiftly without an automated system to monitor and assess sales cycles from beginning to end proved to be a challenging task for the client. Furthermore, the absence of a tool to observe and analyze business processes and customers, such as tracking their requests, assets (machinery, chemicals, and machine breakdowns), was a major roadblock.

The client encountered these difficulties:

- Time consuming data gathering for reporting.
- Lack of an ability to quote and track machinery, chemicals, machine defects.
- No 360-degree customer view of customer's assets, cases, entitlements, etc.
- Limited cross-sell and up-sell opportunities.
- No automation to monitor customers, manual sales process limiting customer experience.
- Disconnected systems resulted in data not being shared across different departments

## Transformation Journey

Forsys helped the customer achieve a successful transformation by leveraging its Salesforce Sales Cloud implementation methodologies.

Here are the main points of the transformation journey:

- Creation & implementation of dashboards and reports to enable E2E business and sales visibility.
- Data integration from various departments to deliver a comprehensive 360-degree view of each customer.
- Customization and automation of customer service and approval processes.
- Implementation of workflows, price quote automation, etc to optimize the lead-to-quote process.
- Streamlining the customer journey and improving defect management.
- Solution implementation for monitoring machines located at customer sites
- case management deployment to address product issues in machines

## Impact



**44%**

jump in sales productivity



**37%**

increase in success rate of won deals.



Improvement in customer retention



Greater visibility into sales performance

## About the Client

The India-based client manufactures specialty chemicals for the paper and paperboard industries. It has three manufacturing facilities in India and one in Thailand. The majority of the products manufactured by the client are used at the wet end section of papermaking.

## Solution Components

Salesforce Sales Cloud, Tracking Solution, Case Management