



70% Improvement in Sales Processes for a Leading Tech Business with Workflow Automation Using Salesforce Sales Cloud Solution

INSIGHT

A leading tech services provider encountered critical workflow inefficiencies caused by disintegrated platforms and inaccurate data. These challenges put their sales modernization on the backfoot. Frequent delays and errors became common, making it difficult to maintain a seamless workflow due to the fragmented systems. Also, inconsistent data across systems complicated reporting and decision-making.

Forsys' bespoke solution on the Salesforce Sales Cloud platform enabled the client to achieve a complete sales transformation. The unification and streamlining of sales resulted in a 70% improvement in sales operations, a 40% decline in sales cycle time, allowing faster deal closures and increased productivity.

BUSINESS CHALLENGES

Operational excellence and customer satisfaction were key success parameters for this prominent technology business. Critical inefficiencies in the sales operations impeded their growth and performance. Outdated processes failed to keep up with the company's growth targets, highlighting the urgent need for process modernization and streamlining.

The client faced several operational challenges, such as:



Fragmented sales processes across different tools and systems



Disintegrated customer and sales data



Manual quoting and sales reporting processes



Inconsistent sales practices



Industry
IT Services & IT Consulting



Revenue
\$1M - \$5M



Employees
11-50



Headquarters
Telangana, India

TRANSFORMATION JOURNEY

The client selected Forsys for implementing a comprehensive solution that will eradicate the workflow inefficiencies from the root. As a first step, Forsys launched an in-depth discovery to accurately diagnose the critical challenges and find areas of improvement, This was followed by designing a custom solution on the Salesforce Sales Cloud - Enterprise Edition. As a top-tier Salesforce partner, Forsys leveraged a phased approach to roll out the solution.

Key highlights include:

 **Sales unification to maintain company-wide uniformity**

 **Custom quoting & sales reporting automation**

 **Customer data centralization to improve relationship management**

 **Advanced analytics and dashboard integration for real-time sales performance tracking**

IMPACT

 **40% cut in sales cycle time**

 **70% boost in sales operations**

 **40% increase in data accuracy and consistency**

 **Better decisions powered by real-time sales data & analytics**

 **Shorter time to market**

 **Reduced administrative workload**



ABOUT THE CLIENT

The client is a leading technology services provider delivering through its integrated services platform to help businesses achieve their digital transformation goals. They assist clients in improving customer and employee experiences, transforming their cloud strategies, updating their networks, and boosting their cybersecurity as a long-term strategic partner.

SOLUTION COMPONENTS

Salesforce Sales Cloud - Enterprise Edition, Custom Quotation Templates

