



Integration of Salesforce CRM with existing applications standardized processes, scaled business for a renewable energy client



Insight

The global renewable energy client was looking to scale its business. For this, the client wanted to standardize business processes, integrate CRM with its existing applications, and track key metrics.

The client collaborated with Forsys to integrate salesforce CRM with its existing applications. As a result, the client has standardized processes and a unified sales platform.

Industry
Renewable Energy
Semiconductor Manufacturing

Revenue
\$1.3+ B

Employees
1001 - 5000

Headquarters
California, US

Business Challenges

The main challenges for the client were:

- Lack of standardized business processes across various geographic locations, such as France, North America, Belgium, and Italy
- Absence of integration between Salesforce CRM with existing on-premises and cloud applications
- Wanted unified sales operations to monitor Key Performance Indicators and operational metrics
- Required scalability to improve pace, flexibility, and customer relations to support business growth.





Transformation Journey

Forsys customized SFDC to address the client’s needs and built several integrations and applications to generate user-friendly customer proposals. The transformation journey encompassed:

- ➔ Building a comprehensive partner management solution.
- ➔ Customizing SFDC to capture homeowner site information, electricity usage, and cost.
- ➔ Determining lease price schedule, termination value, and recommended pricing levers based on cost and dealer fees.
- ➔ Building integrations to the existing applications, including in-house, custom-built applications, and commercial off-the-shelf, including the following:
 - Internal Java Application to add specific products to the sales quote.
 - An engine that generates estimations of energy production for configured systems and site locations.
 - Third-party solutions to generate user-friendly customer proposals detailing business advantages, financial benefits, and lease process expectations.
 - An application to calculate energy offset and customer savings based on new utility rate structure, incentives, and rebates. It also determines the electricity bill after installing solar panels.



Impact

Post Salesforce CRM integration, the benefits were:

-  **Maximized investments in SFDC. Resulted in 25% increase in marketing ROI.**
-  **Increased customer satisfaction by 35%**
-  **Reduced data silos**
-  **Integrated Salesforce CRM with on-premises and on-cloud applications.**
-  **Enabled the client to support (numerous) partners as required in the countries where it is emerging**
-  **Increased productivity by 34%**



About the Client

The client, headquartered in California, USA, is one of the largest manufacturers of solar panels. The company’s diversified portfolio leads residential, commercial, and utility energy markets and solar storage solutions.



Solution Components

Salesforce CRM