



E2E Optimization of Lead-to-Opportunity Journey using Sales Cloud Implementation for a Greenery Solutions Business

INSIGHT

A prominent greenery solutions provider found itself grappling with the operational complexities of an expanding sales cycle. Lack of automation hampered their lead-to-opportunity process, sales forecasting accuracy, & annual revenue tracking.

Forsys, as the transformation partner, harnessed Salesforce technology to overhaul the client's sales mechanism with lead-to-quote optimization. The customized solution enabled the client to achieve e2e sales cycle automation & execute data-driven strategy design.



Industry
Facilities Services

Revenue
\$10-25 M

Employees
200-500

Headquarters
Telangana, India

BUSINESS CHALLENGE

Serving a broad customer base, the client's sales team faced operational challenges due to the absence of a systematic approach to managing the end-to-end sales cycle. The manual handling of sales activities led to inefficiencies and a lack of strategic insight into business operations.

The specific challenges included:

- Absence of a systematic lead tracking mechanism (by product, region, & team) resulting in missed opportunities and lack of strategic targeting
- Consistent tracking of annual business on a customer-by-customer basis leads to frequent pending payments
- Setting and tracking sales team-wise forecasting, including setting targets and tracking actual performance against these targets
- Decentralized reporting and lack of dashboards

TRANSFORMATION JOURNEY

Forsys designed a tailored Salesforce solution that reengineered the client's sales cycle in entirety.

Key takeaways from the transformation journey:



Optimization of the lead-to-opportunity journey with integration of lead assignment rules, rigorous validations, automations, and workflows



Creation of an in-depth account hierarchy system with the development of a thorough account structure



Enhancement of sales forecasting with the establishment of sales quotas coupled with the monitoring of real performance



Customization of reports to suit different levels of employees



IMPACT



Improvement in revenue visibility and management



Real-time performance tracking of sales teams



38% improvement in accurate forecasting



Over 26% growth in deals



Decline in sales cycle duration



Enhanced partner collaboration visibility



Improved tracking of tenders

ABOUT THE CLIENT

The client provides workspace greenery solutions with a vision to take Greenery to the doorsteps across the country has transformed itself into an innovative, efficient and an extremely reliable GREENERY PARTNER to a large number of big and swanky corporate workplaces in India.

SOLUTION COMPONENTS

Salesforce Sales Cloud