



Improvement in Sales Visibility for a Top Manufacturer with Forsys' Custom Solution Built on Salesforce CRM

INSIGHT

A leading FHP motor manufacturing business struggled with complex product configurations and inefficient quotation processes, hindering growth and falling short of meeting their diverse customer needs. The need for an advanced solution, not an additional CPQ license, was urgent because Salesforce Sales Cloud - Enterprise Edition couldn't handle intricate products and bundling setups, leading to inefficiencies, errors, and higher operational costs.

Forsys stepped in with Forsys Manufacturing Catalog - a smart, cost-effective custom CPQ solution built on the Salesforce Sales Cloud for manufacturing businesses. This solution effectively managed complex product setups, basic bundling, reconfiguration, and pricing, and streamlined the quote creation process. As a result, the client recorded a 10% jump in overall revenue and administrative efficiency, improved customer relationships, and more accurate financial planning.

BUSINESS CHALLENGE

As one of India's leading motor manufacturers and a major exporter, the client's rapid growth presented challenges in meeting diverse customer needs, impacting both growth and productivity. The complexity of their product configurations and reliance on outdated methods hindered their ability to streamline the quotation process, leading to frequent billing errors, delayed invoicing, and renewal difficulties.



Industry

HVAC &
Refrigeration
Equipment
Manufacturing



Revenue

\$50-100M



Employees

250-500



Headquarters

Haryana, India

TRANSFORMATION JOURNEY

Forsys conducted a thorough review of the client's challenges and designed a manufacturing solution called "Forsys Manufacturing Catalog" on Salesforce Sales Cloud - Enterprise Edition. This solution not only addressed the current issues but also offered scalability to support future enhancements in product configurations, pricing scenarios, and bundling setups, all without hassle. Since the client's offerings needed to be engineered to meet their customers' specific requirements, managing the complexity and customization within the Engineer-to-Order (ETO) environment was a constant challenge.

The transformation journey witnessed the following:

- **SALES CLOUD**
 - Creation & optimization of lead, account, & opportunity management processes
 - Digitization of the steps for lead assignment, qualification, and analysis
 - Deployment of lead conversion workflows
 - Implementation of dashboards & reports for better sales visibility
 - Establishment of key metrics for milestone and commercial targets
- **QUOTE MANAGEMENT**
 - Streamlining of quote creation with multiple versions
 - Automation of the generation of quote documents
 - Implementation of a 3-tier approval system based on product margins
- **PRODUCT MANAGEMENT**
 - Oversight product setups with sub SKUs
 - Implementation of a 3-level bundle configuration with specific attributes and filters, and optimized bundling and reconfiguration through product rules
- **DATA MIGRATION**
 - Completed a full migration of vital data, including accounts, contacts, opportunities, and products.
- **FREIGHT AND DELIVERY CHARGES SETUP**
 - Implementation & effective management of freight and delivery charges.
- **PRICEBOOK MANAGEMENT**
 - Administration of price books in INR, USD, and AUD, for both regular and customized pricing models

IMPACT

- **10% boost in administrative efficiency**
- **10% jump in overall revenue**
- **44% improvement in sales productivity**
- **37% rise in win rate**
- **Better sales clarity**

ABOUT THE CLIENT

The client is one of the largest single-phase Fractional Horsepower (FHP) motor manufacturers in India and also one of the largest exporters of motors in its business segment. It serves domestic markets across India and export markets in the USA, Middle East, Mexico, Southeast Asia, and Australia.

SOLUTION COMPONENTS

Salesforce Sales Cloud - Enterprise Edition, Forsys Manufacturing Catalog