

Streamline **Sales Process** and Gain Greater Visibility

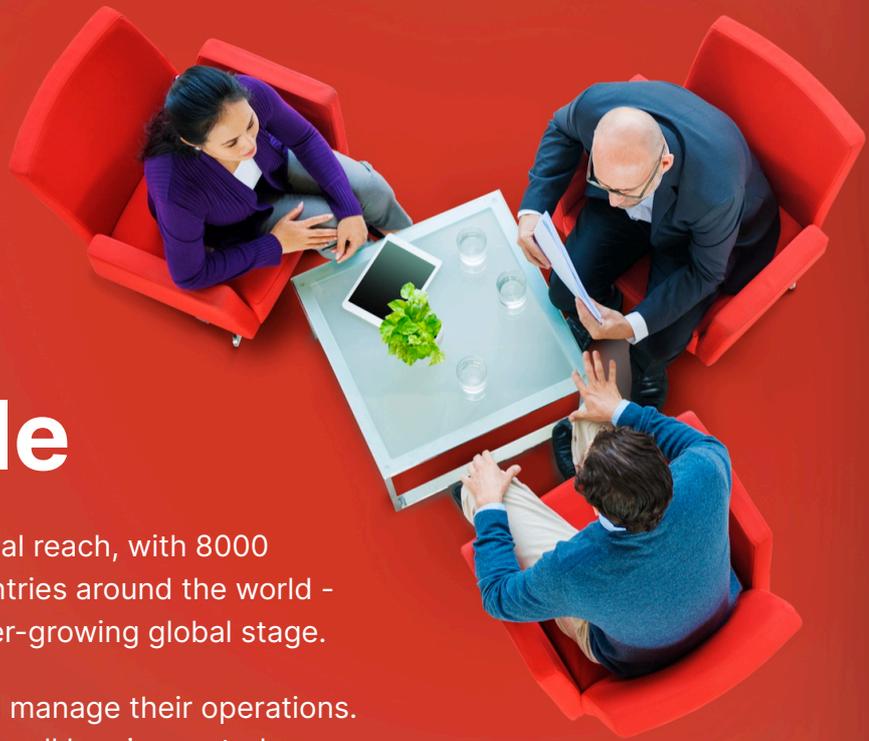
Eclat enabled their customer to streamline their sales process and gain greater visibility into overall performance



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Client Profile

A technology and services firm of international reach, with 8000 experienced professionals located in 28 countries around the world - this US-based company is a leader on an ever-growing global stage.

Our client's service offerings are monitor and manage their operations. These technologies include seismic imaging, well logging, petroleum engineering software, and reservoir simulation software. Additionally, oil and gas companies often use drones, robotics, and machine learning to improve safety and efficiency.

Challenges



Lead info Stored in Outdated Excel

Customer had a legacy CRM posed multiple problems, as it relied on outdated Excel spreadsheets to store essential lead info like names, emails and phone numbers.



Scattered Info Without Linking

Presented with an antiquated system that lacked connectivity between lead assignment and sales tracking, their process for assigning inbound leads was inefficiently manual. As such, they were unable to link activity with unit allocations or record conversions accurately.

Solution



Streamlining the Lead System

Streamlining the lead system to align with organizational goals, creating a set of standards for leads and opportunities that further propel us forward.



Leads are Monitored and Tracked Within the System

Ensuring that incoming leads are monitored and tracked within the system, our team will create an organized structure for capturing necessary data such as how long each individual has remained in a lead status.



Custom-Generated Reports

Sales agents and managers can stay in the know with custom-generated reports. These provide valuable insights into opportunities that have yet to be engaged, as well as progress through each stage of the sales pipeline - identifying when it's time for them to take action.



Benefits



Standardized Approach

By introducing a standardized approach for all agents, the customer has dramatically improved efficiency throughout their sales process and made tasks easier to manage.



20% Increase in Efficiency

By unifying sales and operations planning processes, decision-making is bolstered by comprehensive data insight. Streamlined reporting empowers a 20% increase in efficiency of the entire sales management team.



Technologies

Salesforce Sales Cloud

This refers to the core CRM platform provided by Salesforce.

Mobile Sales

This allows sales teams to be more productive and responsive, even when they are away from their desk.

Apex

A custom programming language that enables developers to construct specific business rules and automate workflows within Salesforce.

Salesforce AppExchange

A platform that facilitates the purchase and sale of personalized applications, components, and integrations for the Salesforce system.

Customer Relationship Management (CRM)

It is a centralized repository for customer information, including contact information, property preferences, and transaction history.

Lightning Platform

A platform-as-a-service (PaaS) that provides a flexible and scalable environment for building and deploying custom applications in Salesforce.

Salesforce Lightning Web Components

(LWC) is a framework for building user interfaces on the Salesforce platform.