Results

Technicoat has implemented the user-friendly Salesforce system which enables the managers and employees to easily and quickly access information about the company's customers from all over the world. They may thus easily find data about the turnover generated by the individual customers or monitor the complaint process directly in the customer's profile. Furthermore, the scoring method saves the sales team's time because they no longer need to process quote requests with zero potential for new business. The company management also benefits from the access to comprehensive overviews of customers, sales team activities, efficiency of the individual departments, and profitability of contracts and customers. This kind of information helps to use resources and plan the business and manufacturing activities more efficiently.

Streamlining the Business Processes with the Help of Salesforce

in TECHNICOAT s.r.o

Sprinx Consulting

www.**sprinx-consulting**.cz

Background

Technicoat is continuously growing, gradually opening new branch offices all over the world. Previously, the company used a system which did not fully meet the needs arising from the company's growth. The management thus searched for a new system which would be easy to use, support better cooperation among the sales teams, and generally simplify administration of the individual business cases. Sprinx Consulting introduced Technicoat to Salesforce, enhanced with additional modules that perfectly meet the company's needs. Even as the Technicoat's requirements were gradually increasing, the modular architecture of Salesforce made it possible to easily add and modify selected system modules.

About the project

As the demand for Technicoat's services began to grow, the company management began to seek ways to make the corporate activities more efficient, facilitating a timely response to the growing demand and also an optimum classification of potential contracts in terms of their suitability. Sprinx Consulting devised a solution for Technicoat which simplifies and speeds up the sales process and also enables monitoring of the business and manufacturing activities as well as the turnover of the company from various points of view.

Initial requirements of the client

- To make the activities of sales teams more efficient so that they can react to incoming quote requests more swiftly and thus contribute to a higher turnover.
- To gain a better insights into the results of the sales department.
- To simplify the complaint process.

Solution

Consolidating all the data from systems used by Technicoat into Salesforce:

- The management of the company as well as the sales teams have access to all the information about business cases of the individual branch offices.
- The requirements and activities of the customers are monitored in a broader context.
- Data from the branch offices are consolidated, which makes it possible to centrally monitor the client's turnover in each organisational unit.

Setting up the process of quote requests assessment based on their potential:

- The customer fills in a web-based form which allows him/her to provide very specific information. The quote request is then classified and sent to a sales team member who creates a price quote directly in the system, corresponding perfectly to the input data from the potential customer.
- Incomplete quote requests are processed by a marketing team members who contact the customer in order to obtain the missing information. The sales team members thus work only with complete quote requests which are very likely to lead to an actual order.
- Within the same time period the sales department processes more binding orders which are then passed on to the manufacturing process more swiftly. The new scoring feature in Salesforce facilitates an efficient classification of important contracts, forwarding the complete input data to the sales department.

Salesforce as a storage point for drawings and specifications:

- Authorised users may access the data from anywhere, anytime. The digital format of the documents simplifies their circulation, searching, and archiving.

Automation of the complaint process through a dedicated module:

- The system facilitates monitoring of all the information regarding the complaint process, including the costs of the given complaint and a list of activities and persons involved.

Additional modifications

- Integration of data from several ERP systems AbRA used in individual branch offices of the company into a single Salesforce system, so that all users have access to unified and comprehensive information, history of contracts, and financial data needed to assess the profitability of a given client and contract.
- Creating a scoring system for quote requests which identifies their potential immediately when the customer first contacts the company, so that the sales team members do not have to process incomplete quote requests which are not likely to generate an actual order.
- Expanding the Complaints module with a new feature which enables monitoring of the costs associated with the handling of individual complaints, and identification of the persons who were directly or indirectly involved in the handling of the given complaint.

TECHNiCOAT
Functional Coatings

Technicoat specializes in the application of technical coatings, based on its know-how developed during their 25 years in the business. The company applies customised technical coatings, offering application of functional high-tech coatings particularly in the field of non-adhesive and anticorrosion solutions and dry lubrication.

Sprinx Consulting

Sprinx Consulting s.r.o. is a subsidiary of sprinx systems, a. s, a Czech technology company. We specialise in consulting services regarding the Salesforce and Veeva platforms, including their implementation. Other areas of expertise include "front-end" systems or, in other words, web based solutions that are used directly by the common user. They may take the form of websites, portals, web shops, integrated reporting and managerial interfaces (MIS), application hosting or economic system hosting – whatever you need, we are here to advise you and take care of the entire implementation of the selected solution. Last but not least, we offer services associated with "Big data" as well as customised software development.

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