

Customer Success Story

CUSTOMER SIZE:

2 - 10

INDUSTRY VERTICAL:

Small Business

SALESFORCE PRODUCTS:

Sales Cloud

INTEGRATIONS:

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ENGAGEMENT LENGTH:

6 Months

Simplifying Sales Reporting and Deal Management for Rohan Enterprises

ROHAN ENTERPRISES

Rohan Enterprises is an industrial trading house. The company is involved in the sales & distribution of engineering products- industrial consumables and also capital items to manufacturing companies in and around Pune district.

Original Challenge

The customer needed a streamlined solution to receive daily sales reports for each salesperson, track visitor interactions and customer details across Leads and Opportunities, and maintain consistent follow-ups. They also required improved collaboration with regional heads to close deals, up-to-date records of quotes, visibility into achievement versus quota, and real-time deal tracking for management reporting.

Outcome #1

Worked with Rohan Enterprises to build a customized sales process on Salesforce. Configured a check-in/check-out feature, enabling the sales team to effectively track field activities. Meeting updates were simplified to make it easier to monitor deal progress. Additionally, we ensured the application was user-friendly to drive adoption and consistent usage across the team.

Outcome #2

Rohan Enterprises quickly adapted to the new technology, fostering healthy competition within the sales team to drive better performance. Reporting of daily sales activities became significantly simpler, allowing the team to easily track deals and monitor key performance metrics.