ENHANCING SALES PROCESS EFFICIENCY THROUGH CUSTOMIZED SALESFORCE DEPLOYMENT

▶ Customer Story | Professional Services

QUOSPHERE
INTELLIGENCE & INSIGHTS

CLIENT

Leading Patent Research & Consulting Firm

Over 500 cases in Patent Analytics and Search handled

The client is a Patent Research and Consulting Company with highly experienced individuals from the Technology, Management and Legal fraternities on board. They offer full-service IP legal and technical experience in virtually every industry and technology from electrical and electronics engineering, computer technology, mechanical engineering, material sciences, consumer products, medical devices, and biotechnology to chemicals, and alternative energy. The company has handled more than 500 cases related to patent analytics and patent searching.

CHALLENGE

Existing CRM lacked scalability

Automatic logging of sales calls required

Visibility of contacts pipeline

The client's existing CRM lacked scalability and hence prompted the client to move to the Salesforce platform to gain additional benefits. The company wanted automated logging in of all calls made by sales agents on Skype. Also, it needed visibility into the contacts pipeline as well as a provision for managers to easily assign and re-assign bulk contacts to different members in their team as per their convenience

SOLUTION

| Salesforce | Salesforce-Third party app integration for call logging | Custom page for contact reassignment |

The Salesforce platform was deployed with third party app integration with Skype for automated call logging, at zero cost. The Lead an Opportunity modules of the platform were discarded and replaced with a single object to capture the entire contacts pipeline, thus simplifying and streamlining the process further. A custom page with multiple parameters was designed for contact reassignment.

BENEFITS

| Improved visibility of sales activities | Faster bulk data reassignment | Increased workforce efficiency |

The company management now has better visibility into the sales calls, the activities within, with automatic logging of all Skype calls made from the system, without any intervention from user. There's a significant increase in productive time of managers, who are now able to reassign bulk amount of data with a few clicks, and increased visibility into the contacts pipeline, thus improving overall workforce efficiency.

ABOUT QUOSPHERE

Quosphere provides innovative solutions in the areas of Business Intelligence, Big Data, Data Visualisation, Analytical Frameworks and Cloud Technology. Our services are focused on helping organisations translate the effectiveness of Big Data & Machine Learning technologies into great business impact.

Quosphere helps customers derive transformational growth & value through consultative deployment of Salesforce. Our experienced consultants deliver unmatched customer value by engaging closely with various key customer stakeholders to quickly deliver customized solutions, enhance adoption and help organizations derive business insights.

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