



## Ready on Road with Salesforce Sales Cloud



### CHALLENGES

- No lead routing or opportunity management.
- No Follow ups on leads and opportunity. No business automation.
- Unable to Manage Pricing for products across globe.
- Data been managed in MS Excel. Create Draft Quotes. Hard to access information while travelling.
- No tracking of Sales Reps while meeting with prospects or clients.
- Analytics were done on MS Excel in the form of Pivot tables, etc.



### SOLUTIONS

ClifyX Inc Guide reps through deals stages and educate best practices.

- Create and convey exactly sales cites easily. • Enabled Einstein Forecasting.
- Spare leads, contacts, and every one of their information into the client’s Salesforce framework.
- Determine at-risk opportunities with Opportunity Scoring.
- We incorporated the application with Google Maps for progressively advantageous and exact arranging by region.



### RESULTS

Make and view a superior pipeline of quality leads.

- **Post our implementation, the business spiked to 25% in Q3, from 18%, which further increased to 30% in Q4.**
- Prevail upon more clients, increment benefits, and hit their business targets.
- Can see sales data in Salesforce1 Mobile App along with notifications.
- Opportunity Approval from Management on time with proof.
- Stakeholders can see sales, revenue details with few clicks using Salesforce Reports. Stakeholder can visualize monthly, quarterly, yearly revenue in Salesforce Dashboards.
- Managing products with multiple currencies with right price.
- Generate Quote pdf with products and prices with minimal clicks