

INDUSTRY

# Pharmaceutical

Company is engaged in manufacturing of bulk drugs addressing to various high potential therapeutic segments

Company utilize Salesforce to optimizing sales processes, enhancing customer management, and facilitating ethical growth, aligning with their vision to be a respected pharmaceutical leader with global reach and integrity.

## Value Creation Modules

### Customer Life Cycle Management

Automated customer onboarding and lifecycle management with defined milestones.

### Effective Activity Management

Task prioritization and email integration improves productivity and focus for sales teams.

### Better Decision-Making

Actionable insights enable informed decision-making and strategic planning.

### Enhanced Data Accuracy

Standardized fields and automation improves the reliability of customer information and decision-making

### Intelligent Reporting

Real time reports and dashboards for the business owners and operations team to keep a check on business health

## Personas

- Sales Team



## Products & Technologies Used



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## CHALLENGES

- No view of customer unified data across different business vertical.
- Duplicity of customer accounts and contacts causing manual errors
- The process of managing sales opportunities lacks clarity and automation, leading to challenges in tracking and progressing deals effectively.
- The quote management process is manual and lacks standardized fields, resulting in delays and inaccuracies in generating and tracking quotes.
- Lack of unified business health dashboard across sales, service and marketing.

- Develop standardized fields and processes for lead, account, opportunity, and quote management to ensure consistency and reliability in sales data, facilitating better decision-making and analysis.
- Utilize Salesforce's capabilities to automate and streamline the management of sales opportunities and quotes, improving efficiency and accuracy in deal tracking and quoting.
- Implement automated task assignment and prioritization with email integration in Salesforce to streamline activity management, enabling sales teams to focus on high-priority tasks and opportunities.
- Integrate Salesforce with ERP systems for seamless data synchronization.
- Create comprehensive reports and dashboards, providing actionable insights for decision-making and performance monitoring.



## SOLUTION



## BENEFITS

- Automation of lead, account, opportunity, and activity management processes reduces manual effort, accelerates sales cycles, and improves productivity.
- Standardized fields and automated workflows ensure consistent and accurate data capture.
- Streamlined opportunity and quote management processes enable sales teams to focus more time on selling activities, resulting in increased win rates.
- Efficient management of sales activities and timely follow-ups lead to improved customer engagement and satisfaction, fostering long-term relationships and loyalty.
- Comprehensive reporting and analysis capabilities provide actionable insights into sales performance and trends, enabling informed decision-making and strategic planning.