

# Transformed Pre-Sales for a Steel Giant, implementing a Smart Salesforce Solution

## Overview:

A leading steel manufacturer's prefabricated solutions division sought to streamline its pre-sales and sales processes. By implementing Salesforce, they aimed to centralize data, automate manual workflows, and integrate with Microsoft Project for smoother transitions from sales to project execution.

## Pain points:

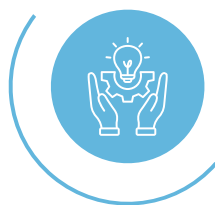
**Manual and disconnected sales processes** causing inefficiencies



Difficulty in **transitioning data** from sales to the project execution team



**Low user adoption** of existing systems



**Lack of integration with Microsoft Project**, resulting in poor project handover



## Solutions:

**Centralized pre-sales and sales data** with Salesforce

**CTI and dynamic scripts** for more efficient pre-sales calls

**Automated lead assignment** based on custom criteria

**Integrated Salesforce with Microsoft Project** for seamless project transitions

Streamlined **design costing, quotes, and approvals** with custom entities

Created **dashboards** for real-time insights into sales performance and KPIs

## Benefits:



**20% ↑ in sales efficiency**



**Automated workflows** for lead management, quoting, and approvals



**15% ↑ in Salesforce user adoption** across teams



**15% ↑ in operational efficiency** by reducing manual process



**Seamless project transitions** through integration with Microsoft Project