

Building a Customized Solution to Automate Planning and Reporting Process for Customer Visits



Objective

The client wanted to develop an automated solution helping them gain better visibility among frequencies and duration of customer visits made by its sales and marketing teams. The customized solution should provide automated approach to allocate accounts to sales reps and also keep check of their calls and visits.



Challenges

- Automate allocation of customers to sales representatives
- Reduce productivity error between sales and accounts team
- Deliver easy and intuitive reports to facilitate decision making
- Implement approval workflows



Approach

Rishabh Software's team designed a customized solution for managing the customer visits by customizing Salesforce.com. The solution simplified the process of assigning accounts to sales reps resulting in easy segregation of accounts. This customization provided the ability to plan calls and its frequencies. It also helped in generating various reports for analysis and better decision-making.



Business Benefits

- Improved sales performance and forecasting by segregating accounts
- Higher profitability by eliminating duplication in customer visits
- Enhanced decision making process through KPI & forecast reports
- Driving customer conversation with collaboration between sales, marketing teams and managers

Industry Segment

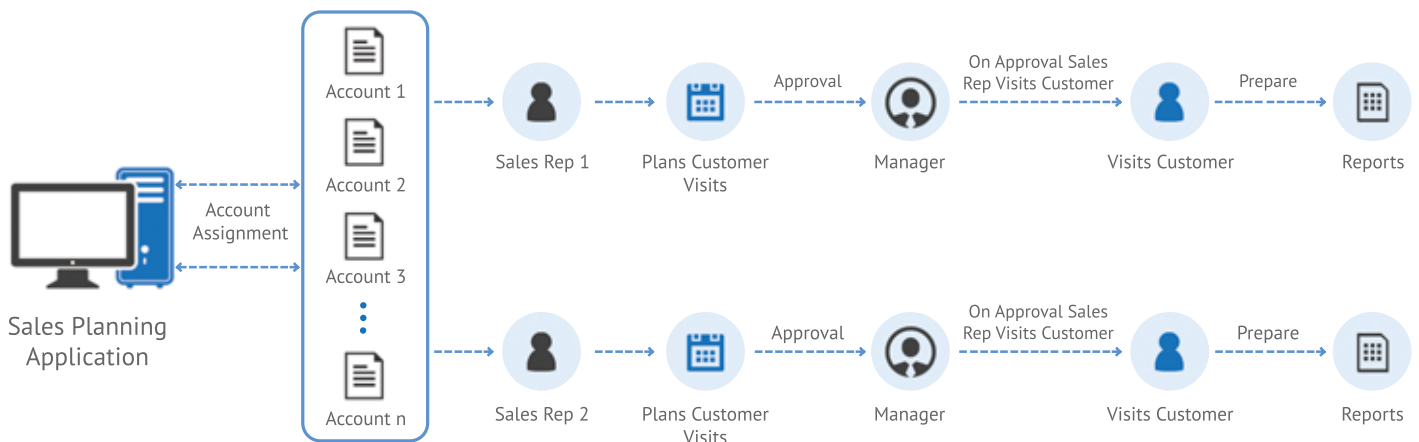
Manufacturing

Customer Profile

A US based leading supplier of eye health products, such as contact lenses and lens care products through its global business divisions in the Americas, Europe, Middle East, Africa and Asia

Technology and Tools

- Force.com platform
- Apex
- Visualforce Pages



About Rishabh Software

Rishabh Software provides software services and solutions to mid-sized enterprises globally through our offices in the US, UK and India. We leverage the latest technology stacks in Cloud, Mobile, Business Intelligence and other Enterprise technologies helping clients to get the best value of their IT budget. With our team of 150+ software developers, we have implemented 220+ successful projects across 22 countries. Our process-driven approach has helped Rishabh to achieve CMMI Level-3, ISO9001 and ISO27001. Our team works on .NET, Java, PHP, iOS, Android and others technologies. We are a certified Microsoft Gold partner.



www.rishabhsoft.com | sales@rishabhsoft.com

US: +1 877 747 4224 | UK: +44 207 993 8162