

## Streamlining Lead-to-Cash and Project Management with Salesforce for a Leading Glass Product Manufacturer

### Overview:

A renowned brand specializing in **portable folding, sliding, and minimal sliding glass systems**, with a strong presence in **North America** and **Canada**, it sought to streamline its sales processes for its diverse range of products. Leveraging **Salesforce Sales Cloud** and **CPQ** capabilities, the company aimed to optimize its **Lead-to-Cash (L2C)** cycle, improve **customer management**, and integrate its **order management** system seamlessly with other business platforms.

### Pain points:

Fragmented sales processes from lead capture to payment processing

Inefficient project management leading to longer cycles and confusion in customer communications

Lack of a unified system to track business deals, key stakeholders, and ongoing projects

Integration challenges with external systems like KBMax (product configuration) and Shopify (e-commerce platform)

Manual processes creating bottlenecks in generating quotes, managing orders, and closing projects

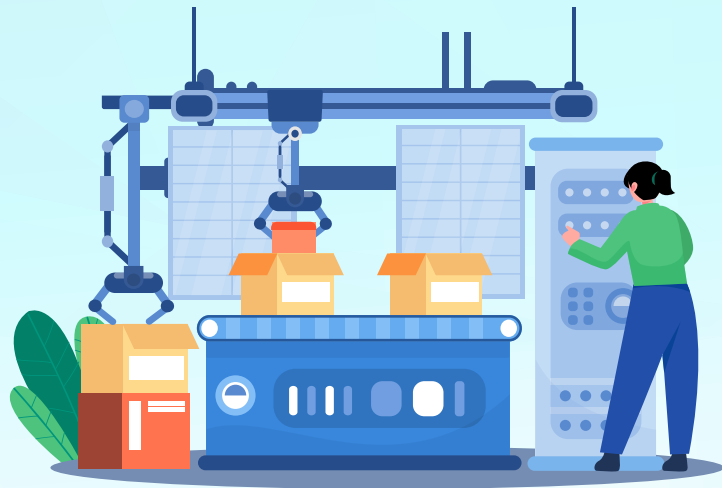
## Solutions:

Developed a Salesforce CRM system with Sales Cloud and CPQ to automate the Lead-to-Cash cycle.

Integrated with KBMax for product configuration and Shopify for seamless online order placement

Custom-built Quote and Order Management processes.

Enabled project management for tracking customer-wise projects and payment-based closures.



## Benefits:



**2X Faster sales cycles** and **15%↑ in productivity** through automation.



**Seamless integration** with **KBMax** and **Shopify** for smooth workflows.



Streamlined **project management** and **customer tracking**.



↑ **Analytics** for better reporting and decision-making