

Sales and Operations automation for Manufacturing company

Problem Statement

- Manufacturing company looking for sales automation software
- Also looking for customisation to handle operations and delivery
- Need a comprehensive solution that can also provide commission calculations and analytics.

Solution

- We set up Zoho CRM for the sales process to handle lead inflow and lead conversion into opportunities.
- The quoting and invoicing process was set up in the CRM as well. Validations were added using client scripting for quote pricing approvals.
- Custom modules were set up for collating payment data from their accounting system for the reconciliation of invoices.
- The orders module was used to manage order placement to the warehouse team, and role-based access was used to give location-wise access to the warehouse and delivery team to update the status of production up to delivery.
- The commission calculator was built using Deluge to match the incentive programme shared by the client.
- Dashboards have been set up in Zoho Analytics, and these provide detailed insights into sales vs collections, sales team performance and which products are being sold the most.

Key Findings

Centralised Sales Management Improved Efficiency.

Pricing Control Reduced Revenue Leakage.

Improved Financial Accuracy Through Reconciliation.

Enhanced Cross-Functional Collaboration.

Automation of Commission Calculations Increased Trust.

Data-Driven Insights Enabled Better Decision-Making.

Conclusion:

The implementation of Zoho CRM as an end-to-end sales and operations platform successfully transformed the client's business processes.

By integrating