

A Leading Chemical Manufacturer Transformed Its Field Sales Operations Through Robust Integration of Its SAP System with Salesforce CRM

More Efficient Sales Operations. Better Insight-based Decision Making. More Revenue



Client Profile

The client is one of the largest lab chemical manufacturers in Southeast Asia with a diverse product portfolio of over 8000 items. Its commitment to international quality aligns seamlessly with the 'Make in India' initiative, supported by a vast infrastructure including two large manufacturing units, widespread distribution network of over 200+ distributors and 4 depots across the operating region, and a comprehensive range of 2500+ specialty, rare, and research fine chemicals.

The Problem

The client wanted to improve the performance of its field sales team and get better data insights related to sales. But absence of a dedicated, unified, end-to-end field sales management platform created several bottlenecks in terms of low visibility into field sales team's activities and lack of transparency. Adding to that the siloed data which was scattered across their existing SAP system and the inability of sales team to access quotes generated in SAP system was resulting in overall inefficiencies. Moreover, there were other challenges pertaining to the integration, including budget restriction, user adoption, secure data migration, and business-specific customizations. The client decided to implement a Salesforce technology-based field sales management solution and wanted to complete email-based integration with SAP system in a more cost-effective approach.

Absence of a unified field sales platform

There was an apparent lack of a unified field sales platform that would provide business leaders complete insights into opportunity and pipeline management, field sales team's geo-location-based attendance, different accounts, and contact data management. Moreover, the generated quotes were created in the external system (SAP) without any real-time transparency, thus hindering the effectiveness of field sales team's efforts.

Inefficient data management

The entire business-critical data, including orders and invoice information, was scattered in silos across the currently deployed SAP system, leading to inefficiency in terms of order and invoice processing.

Lack of visibility into key field sales processes

Due to the absence of an end-to-end field sales solution, there was lack of insights into the field team's beat plans, meeting schedules, and sales-related expenses, which lead to operational bottlenecks.

Utilization of legacy email service

An obsolete email service was utilized for the entire communication during integration operation, resulting in critical issues with the parsing of the data sheet being sent via email.

Risk of data security, customization and integration issues, and system downtime

The proposed solution required data migration of business records, which posed the risk of data loss, duplication, or corruption, if not handled meticulously, impacting business processes and decision-making. Similarly, business-specific customizations in integrations such as addition of new fields and data transformations required careful handling to avoid compatibility challenges. The data migration process itself could cause temporary system downtime, affecting day-to-day business operations and customer interactions.

Imminent need for a responsive solution

Since the client's workforce was majorly involved with various filed sales, there was a need of responsive solution which ensured optimal performance and user experience on different devices, including mobile phones and tablets.

User adoption, training & support

The proposed solution involved transition to a completely new interface which may lead to resistance from users, affecting adoption rates and productivity. This required a proper addressal of user queries while ensuring a smooth transition through significant and ongoing training and support programs.



Lack of a dedicated platform to monitor & manage field sales operations



Inefficient data management with siloed and scattered data across SAP system



Deployment of legacy email service with no integration with the deployed system



No real-time visibility into the generated quotes



Severe operational bottlenecks causing inefficiencies

The Solution

Damco's team of Salesforce experts carefully analyzed the business challenges and associated requirements, thereby reaching the conclusion that there's a need to implement a dedicated Salesforce-based solution, further integrating it with the client's pre-existing SAP system by utilizing a more cost-effective email-based integration solution for seamless exchange of business-critical data between Salesforce and SAP.

Implementation of Salesforce-based field sales solution

In order to bring visibility and transparency into client's field sales activities, Damco's Salesforce experts implemented a Salesforce-based field sales solution with the following key components for various processes:

- **Opportunity & Pipeline Management:** The solution provided sales team a robust platform to manage opportunities and pipelines, thus enabling them to track prospects and leads more efficiently.
- **Attendance Management:** The solution with integrated Google Maps allowed easy attendance tracking through capturing the geo-location of users, while ensuring that the field sales team's activities are recorded accurately.
- **Account & Contact Data Centralization:** The solution served as a unified platform to manage account and contact data which is readily available to the sales team.
- **Field Sales Journey Module:** The solution had geo-location tagging, which allowed management to monitor the field team's client meeting attendance to facilitate sales expense reimbursement.

Integration with pre-existing SAP systems

- The team integrated quotes created in the pre-existing SAP systems with Salesforce-based solution to provide sales team with instant access to the business-critical data.
- This integration enabled automated exchange of account, product, order, and invoice data, which reduced dependency on manual processes, thus improving data transparency. Since this integration was email service based, data in excel sheets was automatically emailed to Salesforce for further updation in the CRM.

Data validation and testing

Our team at Damco carried out a rigorous data validation process, which included backup and reconciliation, to ensure the accuracy and completeness of data during migration.

Customization review and testing

All customizations and integrations were thoroughly reviewed and tested by the team in the Salesforce sandbox environment before deployment, ensuring their smooth functioning.

Staged migration and rollback plan

The team followed the approach of staged migration with regular checkpoints to assess progress and address any issues promptly. Additionally, a rollback plan was prepared to revert to Classic temporarily in case of major unforeseen challenges.

User Training and Change Management

Damco provided comprehensive training and support to users, ensuring they were familiar with the new Lightning interface.

The Benefits

The successful deployment of Salesforce-driven solution positioned the client for long-term growth and innovation, while improving overall user experience, team's productivity, and data insights, thus reaffirming their commitment to providing exceptional products and services to its customers in the industry.

Improved Sales Efficiency: The Salesforce integration with SAP system led to a significant improvement in performance of sales team as they were able to access the invoice and order details effortlessly,

Improved Field Sales Operations: The management were able to monitor resources and manage their reimbursements more efficiently.

Improved User Productivity: Enhanced productivity of end users as the Lightning Experience's intuitive interface and enhanced features helped them navigate the platform faster.

Advanced Dashboards & Better Reporting: Improved decision making with better insights as the platform provided the client with more sophisticated reporting tools and tailored dashboards.

Improved User Experience: Significant improvement in user satisfaction leading to better adoption rates as the solution provided an intuitive interface and features.

Ease of Accessibility: The responsive design of the solution allowed client's teams to access critical business data and perform tasks on their mobile while on the field, thus improving their productivity.

Scalability & Future-readiness: Being a Salesforce-driven solution, it brought with it the scope of scalability, future Salesforce updates, innovations, and seamless automation.

Salesforce SAP Integration Driven Solution For Improved Sales Operations & Enhanced Visibility Into Field Sales Activities

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About Damco

Damco Solutions is a strategic Salesforce partner and holds consulting and technology expertise across the Salesforce ecosystem. We help businesses boost productivity and realize the true potential of their Salesforce platform to maximize their investments. Contact us to learn more about the services and solutions that can help transform and build a customer-centric digital-first organization

Contact us for more information
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