



A PROJECT BRIEF ON LOGISTICS AND TRANSPORTATION

Our client has established themselves as pioneers in the automotive and vehicle logistics in Malaysia over the past 30 years.

COMPANY OVERVIEW

They provide end-to-end solutions, which include sea and land transportation, freight forwarding and car terminal services from the factory floor to the dealership door. They also provide handling facilities for the import and export of many automobiles in Malaysia.



CHALLENGES

- Manual management of customer inquiries from 2 different platforms - web and email.
- Time-consuming for the sales team to go through inquiries.
- Possibility of data loss due to manual handling of data.
- No visibility of pre-sales activities like customer inquiries and whether they are being followed up on time.
- No system in place for management to track sales performance.

SOLUTIONS

The Lava Protocols team implemented the Salesforce Sales Cloud solution to enable our client to track leads effectively and to monitor real-time sales performance with ease.

1 Lead Capturing

- Automatically push inquiries from web and email into Salesforce
 - This data will be followed up by the sales team to filter inquiries which are likely to request for quotations.
 - Upon the request for a quotation, the Leads are converted to Account/Contacts.
- Run reports to track Lead Status or Score
 - In order to keep track of pre-sales activities, admin can run a report on lead status or lead source to check whether the leads are being followed up with and also which channel has brought in the most leads for the team.

2

Account and Contact Management

- When a Lead has been converted to an Account and Contact, an Address is also created and copied over automatically in Salesforce.
- This ensures that the Account, Contact and Address information can be pushed to their on-premise system and quotations can be generated for customers.

3

Real-Time Integration to On-Premise System

- Business Accounts with Contact and Address information that are created/ updated within Salesforce are automatically pushed to their on-premise system.
- Individual Accounts with Contact and Address information that are created/ updated within Salesforce are automatically pushed to their on-premise system.
- Any changes done on Salesforce for the Account record will also be synced with their on-premise system.

RESULTS

- Better lead management
 - All inquiries are pooled into a single system
 - Customer emails are now followed up with immediately
- Better visibility of sales performance
 - Standard reports are generated instantly based on real-time data.
- Better operational data management
 - Reduced manual tasks, less chances of data loss, and higher efficiency.