ANCHOR GLASS CONTAINER

Improved Sales and Quoting Efficiencies with Sales Cloud

Products

salesforce sales cloud

grid

Industry
Manufacturing

Profile
Anchor Glass believes in creating, customizing, shipping & collaborating with their clients to create unique and functional glass containers. Through their diverse machine capabilities, Anchor Glass can operate short-, medium- and long-runs to produce flint, amber and black glass containers.

Company Size
2,800 Employees

Location
Tampa, FL

THE CHALLENGE

- Anchor Glass wanted to improve & automate internal sales processes and deploy efficient, real-time pipeline management.

- Needed an automated way to create pricing requests and quotes with custom Terms & Conditions, right from the opportunity record.

- Wanted to improve their reporting capabilities and the speed of creating key dashboards.

- Field reps needed tools that were mobile friendly and accessible on the go.

- Wanted efficient way to document competitive intel inside Salesforce.

- Desire to enhance service to key clients.

THE SOLUTION

- Implemented new instance of Sales Cloud, migrating client, pipeline & historical purchasing data.

- The Configero Grid, an Excel-like overlay for Salesforce, was implemented in order to enhance data visibility & user adoption.

- Chatter Group & custom @ mentions were triggered on competitor names to consolidate & track Market Intel.

- Used Salesforce Flows to provide branched logic that walks reps through each type of pricing request, and then submits for approval through appropriate channels.

- Used Conga Conductor to create complex quotes that auto-derive the correct T's & C's based on data provided on the opportunity and account record.

- Created custom Service Scorecard object to track KPIs on service delivery to key customers.

- Designed custom reports & dashboards to visualize pipeline.

THE RESULTS

- The new instance of Salesforce provides operational control & visibility for both the Sales team and executives.

- Pricing requests are streamlined and linked to opportunities in the pipeline for reporting.

- Approval processes that used to take a week or more are now completed in minutes.

- Improved team collaboration by leveraging automated notifications and approval routing.

- Reps can contribute timely market intel and gain visibility to industry knowledge gathered by their peers.

- Anchor now has a standard quote template with custom Terms & Conditions that can quickly be created by reps.

configero