



Lubricating the Salesforce Data Pipeline

A division of an international, integrated oil & gas company that supplies lubricants to business-to-business (B2B) and marine organizations for engines, transmissions, gear boxes, bearings, turbines and hydraulic systems uses both direct and indirect channels to distribute its products. Distributors provide a vital connection between the company and its customers by supplying the lubricants and appropriate support and services.

The company reported numerous benefits, including a 170 basis point increase in margin in its marine business through more effective sales pipeline management. Indirect benefits included:

- Improved collaboration with distributors by leveraging standard processes
- Enhanced visibility into the distributor channel pipeline
- Reduced product integrity risk
- Improved pipeline conversion rate
- Ability to develop targeted customer campaigns and distributor training programs
- Business KPI reporting for access to real-time data on performance metrics
- Readily available distributor account information
- Faster distributor onboarding and reduced administrative burden via self-service capabilities and automated forms and approval processes
- Improved PI incident root cause analysis and trending

The Sales Pipeline Management tool evaluates, and **helps improve the sales process** to close more deals and report accurate metrics. The mobile-friendly tool is designed to help users enter and track information at any location and increase user adoption.

Following a detailed Deloitte benchmarking assessment across our client's sales and service organization, company executives identified several areas where data flows and inconsistent business process delivery were either impacting revenue growth or elevating risk. Working collaboratively, Deloitte and the client established several marketing and sales improvement tools, all delivered on a Salesforce cloud platform:



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The Distributor Management tool uses Salesforce Sales Cloud with partner communities and Deloitte's Agile project management tool, which tracks business requirements, use cases, and defect management, and helped the team collaborate and report across the project in real-time. The solution's custom sharing mechanism enables information sharing between the company and its distributors while adhering to legal and data privacy guidelines.



The intuitive and collaborative Product Integrity Management tool is designed to enable end-to-end product integrity tracking from the company's blending plants to distributors' receiving, packaging, and storage facilities. Automated forms, a guided assessment workflow, alerts/notifications, gap approval/tracking and dashboards support timely and accurate adherence to product handling requirements.