

Transforming a Sales System for Better Visibility and Collaboration

A global technology and services company reinvented its sales platform to achieve efficiencies across its international sales organization.

*Advisory Services
Salesforce Solutions*

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Client's challenge

A worldwide provider of enterprise-class hardware, software, and services was looking for new ways to manage their largest customers more effectively. The client was unable to effectively collaborate either within or across the organization's boundaries and its systems lacked standardization. As a result, company leaders had limited visibility into the sales pipelines, and getting current information from the field was a challenge. Sales teams had no way of easily sharing information and opportunities, and that caused delays in customer responsiveness.

The company's leadership knew they needed help to create better collaboration, forecasting, and account planning tools that would yield a complete 360-degree view of their customers, improve sales productivity, and better access to critical information about the company's largest outsourcing agreements. Achieving better opportunity management was a multi-billion dollar necessity.

PwC's Advisory solution

PwC had deep and long-standing relationships at the executive level of the company, and those leaders knew of our experience in completing large-scale sales force transformations. A company-wide project was already underway, and we were tasked with creating a Salesforce-based solution for the company's Professional Services group that would meld with the efforts that had already begun.

Our team included a director, a project manager, a functional lead, a business analyst, a change management lead, a development lead, and a testing lead. We began with a highly collaborative series of interactive workshops to create a transformation roadmap. Rather than simply create a plan on our own, we involved company stakeholders at every step to achieve buy-in right from the beginning. Through this work, we were able to discover what was lacking in the old systems to make sure we weren't simply recreating the same processes with different technology.

Keeping in mind the goals of better collaboration and more efficient processes, the Salesforce delivery team then designed, developed, and deployed Salesforce-based solutions that met the client's needs without excessive customization, an important requirement, as the tools had to fit easily into the larger company-wide effort.

We developed an architecture to allow for future changes easily and with minimum of administrative overhead. A single custom object was created that leveraged data from the opportunity header to pre-populate critical pieces of information. The tools themselves were created in Visualforce and laid out in tabular format above other related list information.

All throughout the design process, we made sure the client's global team, its IT experts, and other consulting firms on the project were all working together efficiently and collaboratively. That was the best way to be confident that the resulting systems would be embraced by the entire organization from day one.

Impact on client's business

By working closely with the client, PwC was able to build and deploy an integrated Salesforce-based solution that delivers a true 360-degree view of the client's global customers and gives the sales force the tools it needs to improve its productivity. The client reports much better visibility to information and the sales pipeline. New sales opportunities are already appearing, and the company can accelerate its sales cycle. s

For more information, please visit

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