

CUSTOMER STORY

Looking to improve your multi-channel alignment throughout the bid and sales process? Allium helped a major manufacturing customer simplify their Opportunity Management structure to gain more project visibility, improve collaboration, activate better automation processes and eliminate workflow redundancies.



TYPE OF COMPANY

GLOBAL MANUFACTURING COMPANY



LOCATION

MIDWEST, USA



CHALLENGE

The customer needed to modernize their Opportunity Management processes. Customer painpoints included:

- Trouble managing actions and communications across sales channels
- Poor alignment and transparency during bid and sales processes
- Difficulty indicating action items/ownership and navigating fields within interface
- Lack of automation processes, resulting in a siloed omni-channel environment

ACTION

Allium created a more effective user interface for the customer to streamline workflow and communications, provide consistency and transparency across omni-channels, and elevate automation processes to expedite their Opportunity Management business capabilities.

1

Re-align Opportunity Management structure

2

Fine-tune existing user interface to simplify automated processes

3

Configure custom triggers and notifications to improve transparency



RESULT

Better multi-channel alignment during the sales and bid process — including OEMs, sales, dealers, distributors and partners — enabling more visibility, improved collaboration and enhanced forecasting capabilities.

TRACKING



- Better, more accurate tracking of relevant info
- Elimination of workplace silos created more effective tracking and KPIs

VISIBILITY



- Increased transparency and understanding of sales cycle and project scope
- More consistent communication, collaboration, and ease of opportunity management

AUTOMATION



- More efficiency from new automation processes
- Autopopulation and consolidation of pertinent info in central location (*less clicks in Salesforce*)
- Better forecasting capabilities with automated milestones based on historical processes

Allium



5-STAR CUSTOMER REVIEW



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