CUSTOMER STORY

Our international manufacturing customer needed to modernize their automation processes to better engage and empower Sales. Allium performed a bi-directional integration with Epicor, creating full pipeline visibility, better tracking capabilities and essential reporting for Reps.

TYPE OF COMPANY
GLOBAL MANUFACTURING COMPANY

LOCATION
MIDWEST, USA

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salesforce **PARTNER**

CHALLENGE

The customer had no CRM in place and was managing their Sales process using Epicor ERP. Customer painpoints included:

- Limited forecasting: Pipeline data only visible when Sales actually quotes

- Unable to get a holistic view of their Opportunity pipeline

- No reporting on pipeline, conversion rate, average sale, or Rep production

- Inability to track actions and communications across sales channels

- Multiple Epicor companies — none integrated with Salesforce

- Difficulty navigating Epicor interface for Sales Reps and team

ACTION

The customer used Epicor as a "lite" CRM, so Allium set up Salesforce and conducted a bi-directional integration with Epicor for tracking of pre-Sale/Prospecting activities and Opportunity pipeline.

1 Built Opportunity Sales process using Salesforce

2 Integrated Salesforce and Epicor Accounts, Contacts, Products, Quotes, and Order

3 Built out management reporting and dashboards for visibility into their business

RESULT

Epicor-to-Salesforce integration created streamlined processes for Sales — from Lead to Opportunity management — enabling more visibility, improved communication, and enhanced forecasting and tracking capabilities.

PROCESS

- More consistent communication and collaboration process
- Salesforce Maps install created more efficiency planning onsite visits
- Salesforce Inbox install enabled seamless integration of emails and calendar events

VISIBILITY

- Full pipeline visibility for Reps
- Better forecasting capabilities across Sales
- More efficiency from new automation processes

REPORTING

- Better, more accurate tracking and data
- Improved reporting management
- Ease of Lead/Opportunity management

Allium

★★★★★

5-STAR CUSTOMER REVIEW

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