mirketa
Think .Build .Transform

eBook

Revolutionizing Manufacturing with Salesforce: A Playbook for Efficiency & Growth



Over

1+ Million Hours

of ***salesforce*** Project Experience

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1 About: Salesforce For Manufacturing

This eBook provides details on how Salesforce CRM and its cloud solutions can be configured for managing the day to day activities of a Manufacturing Business and give them the ability to have the Full-360 of their operations. The features discussed in this eBook are based on Mirketa's collective organizational experience in this domain and are based on the direct feedback and feature requests received by Mirketa from Manufacturing Businesses where Mirketa helped rollout Salesforce, integrate 3rd party systems or fixed botched implementation of Salesforce.

1.1 About Mirketa

Mirketa Inc is a bay area corporation that specializes in automating Sales, Marketing and Operations processes for Manufacturing Businesses. It helps its clients define marketing journey's, sales and service processes, configure and manage salesforce.com cloud solutions, integrate salesforce.com with other cloud and on-premise applications, build custom force.com applications while providing sales and service analytics using award winning predictive analytics solutions. Mirketa has extensive experience in the Manufacturing domain and integrating MRP and ERP solutions.



2 Connecting your business, providing the Full-360

All Manufacturing Businesses have a common set of core operational processes. The relative success of their business is dependent on the efficiencies and effectiveness of these core operational processes. The following is a list of departments which need to be connected in order to provide the Full-360 of the Manufacturing Businesses accounts and processes.

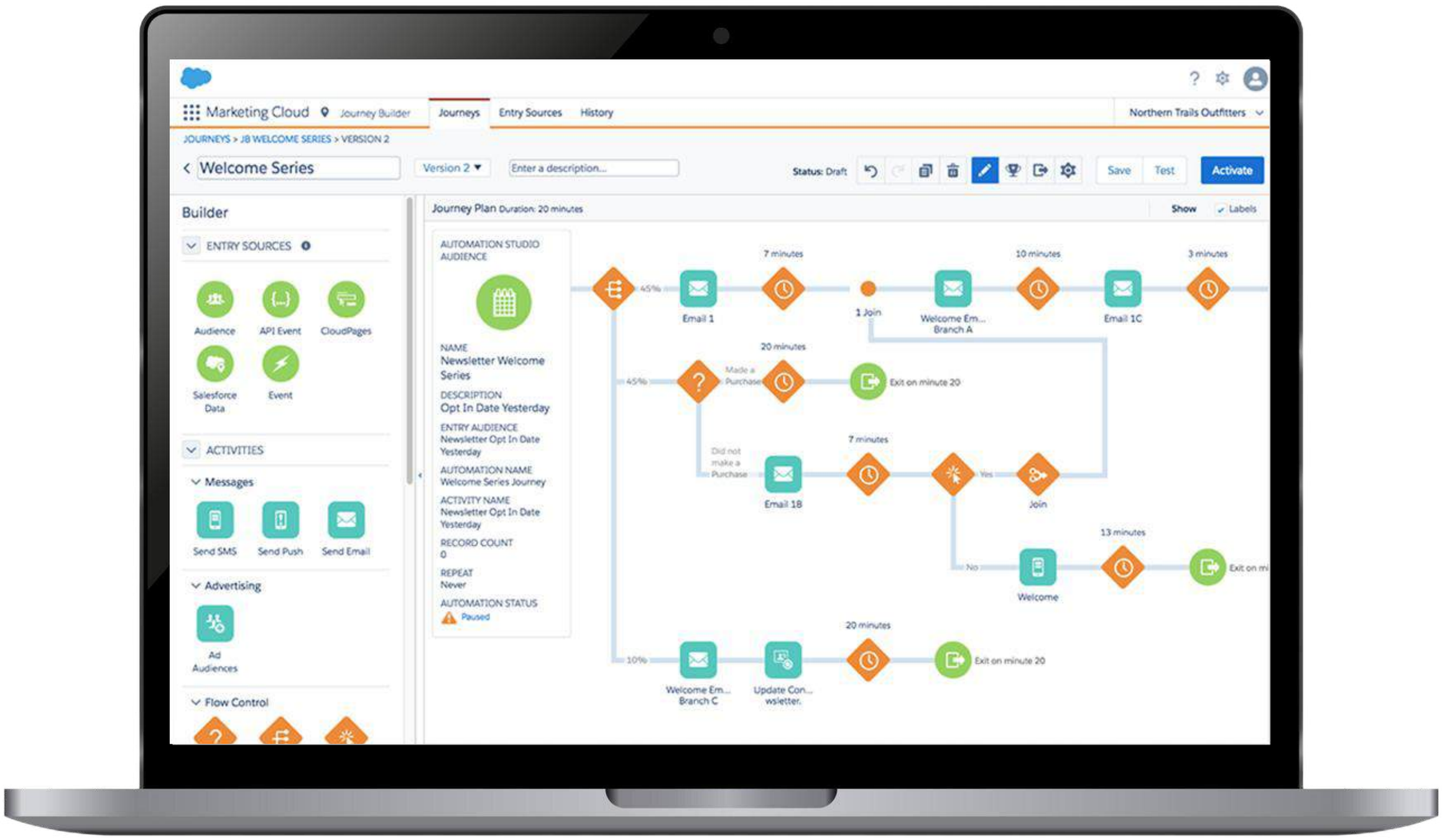


3 Full-360 By Department

For any Manufacturing business having a Full-360 of their business on one platform can make the difference between success and failure. The following steps will explain how a disconnected Manufacturing business can take a step by step approach to connecting every facet of their business providing a Full-360. The Full-360 is a term we use to describe the ability for any department or employee to be able to connect and know what is happening in any part of the business. Thus, allowing the business to convert deals at an exponentially higher rate and service clients with a much higher satisfaction rate leading to success.

3.1 Marketing

Marketing automation will be the first step on our journey to the Full-360 view of your customer. You can create your branded portals, leverage social media, emails and mobile platforms to reach to your prospects and nurture leads. You can even Salesforce Audience Studio to connect different data points about a customer/prospect to create a more comprehensive profile.



3.1.1 Create Customer Journeys

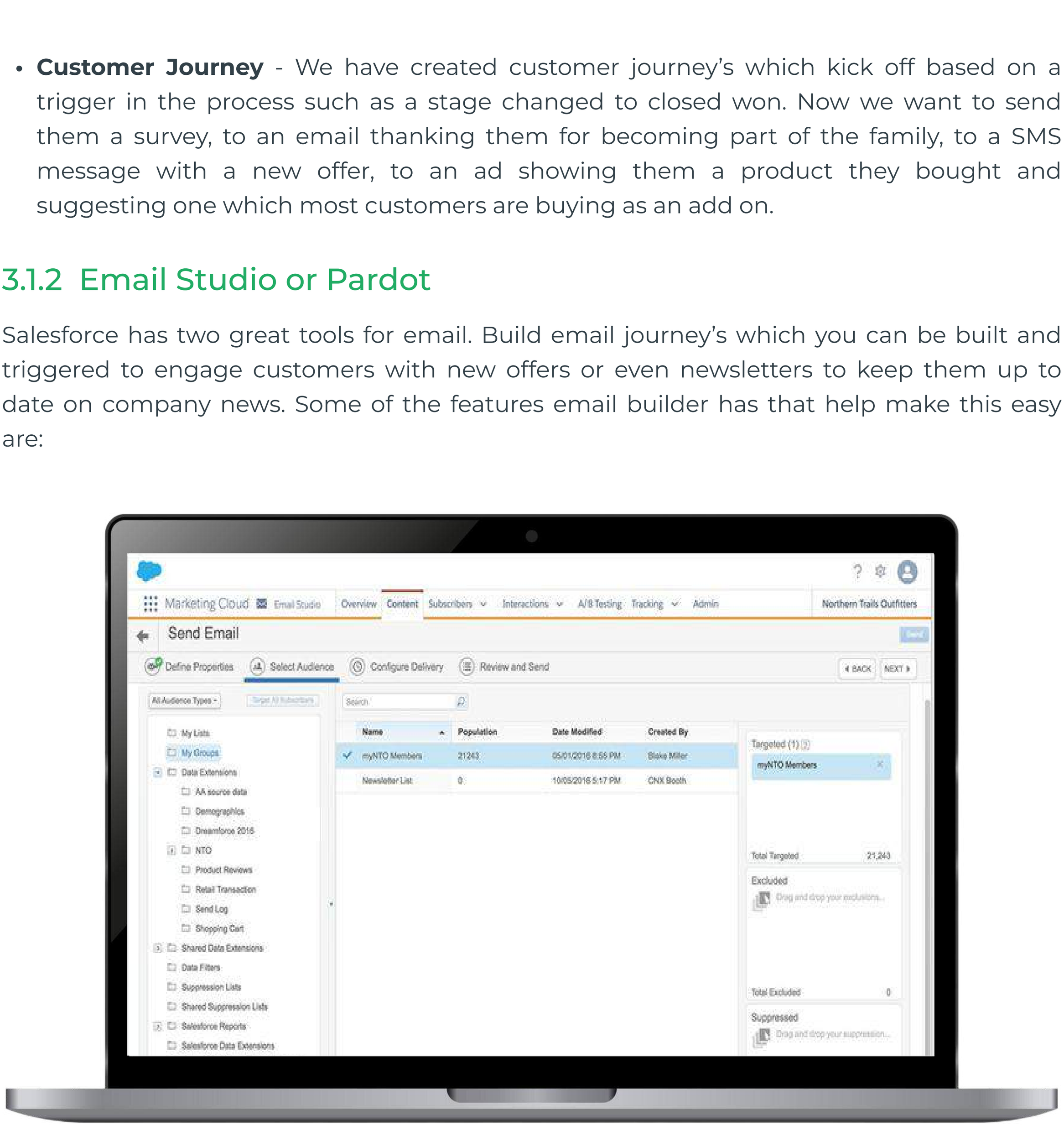
Build journey's for prospects and existing customers alike. With Journey builder we can create a seamless customer experience across every touchpoint including email, mobile, advertising, the web direct mail, sales commerce and service.

- **New Prospect Journey** - Create journeys which will take a prospect and nurture into a customer through touchpoints like website visit, to an email offer, to an SMS message re-engaging them, to an ad you want to show them on social media, to a form fill on a landing page and ultimately into a customer.

- **Customer Journey** - We have created customer journey's which kick off based on a trigger in the process such as a stage changed to closed won. Now we want to send them a survey, to an email thanking them for becoming part of the family, to a SMS message with a new offer, to an ad showing them a product they bought and suggesting one which most customers are buying as an add on.

3.1.2 Email Studio or Pardot

Salesforce has two great tools for email. Build email journey's which you can be built and triggered to engage customers with new offers or even newsletters to keep them up to date on company news. Some of the features email builder has that help make this easy are:



- **Audience Builder** - targeting using segmentation tools which allow you to segment into powerful groups which help you tailor specific messages to special groups

- **Email Builder** - use this tool to create beautiful dynamic emails effortlessly and optimize them so that they appear exactly how you intended them on multiple devices and email servers.

- **Personalization** - Deliver data driven content by utilizing your first party data across your campaigns. Utilized Ai to tailor content based on individual user behavior creating a segment of one.

- With Pardot for email marketing you can track customers interactions with your content and even score lead based on customizes parameters which lead to insight not the content that most resonates with them.

3.1.3 Google Marketing

- **Analytics 360** - Gain deeper insights with Google for Salesforce connector helps you better understand your customer engagement, drive marketing results and access new insights.

- **Tag Manager 360** - Tag and measure with ease by updating and adding tags to conversions, site analytics and more. By tagging with Google you can ensure all tags are accurate with speedy tag loading, error checking and security features

- **Optimize 360** - Optimize web visits by personalizing their experience, A/B test, website editing all meant to optimize the experience will help you acquire more customers.

3.2 Sales

With Salesforce Sales automation capabilities Manufacturing Businesses can continue the prospect journey that was nurtured by Marketing team by managing the leads and Opportunities.

3.2.1 Lead Management

Success in sales starts by building a strong pipeline of leads. A lead is a prospect who is interested in your company but not all leads are created equally. Lead management helps sales teams identify qualified leads. To make best use of the sales team's time they should be able to identify what is a qualified lead and move on to the next step quickly. They should be able to.

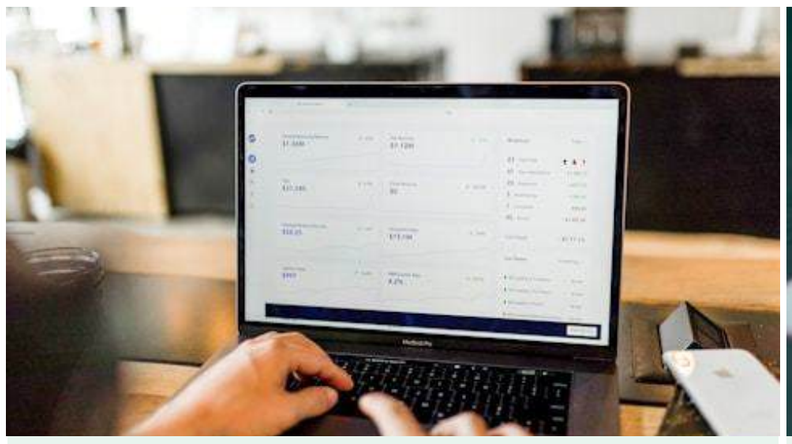


- Acquire leads by importing, creating manually, website form fill or online ads.
- Automatically assign leads using assignment rules based on geography, source, or other attributes.
- Easily convert leads that you identify as a real sales opportunity into an accounts, contacts, and opportunities

Managing your leads allows you to.



Grow Accounts



Find New Accounts



Close Deals Faster

3.2.2 Call Center- CTI Integration And Soft Phone

CTI integration with Salesforce is used to connect callers with Call Center Users. The soft phone is integrated within the Salesforce org and provides several benefits. Here are some of the key benefits of a good CTI tool integrated with Salesforce.

- Identifying and routing incoming calls to the right person or department
- Logging, recording and storing calls for quality assurance and compliance
- Offering screen pops to your agents with information about the caller, their account, open cases or call history
- Embedding a soft phone dial pad into your Salesforce interface so that calls can be made using VoIP (voice over internet protocol) or traditional PSTN (public switched telephone network)
- Enabling agents to click-to-dial or auto-dial contacts
- Monitoring and measuring key performance indicators like average handle time, first-call resolution, dropped call percentages and more.

3.2.3 The Use Of Einstein AI To Help Sales Teams Close Deals Faster

By customizing the powerful Einstein AI your Sales team can close deals faster by showing them.

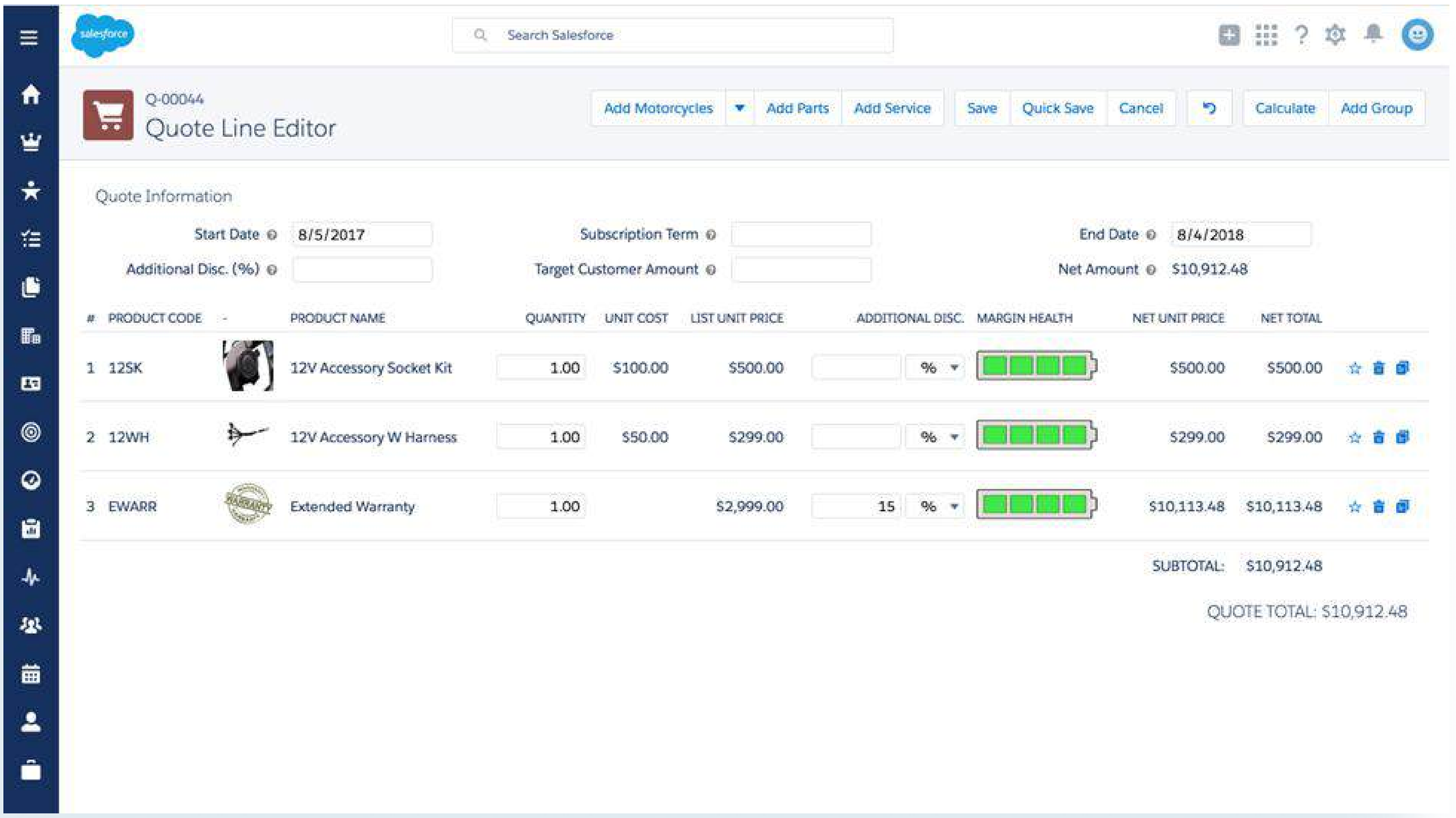
- **Lead Scoring** - Once we know what aspects of the deal lead to a successful outcome Einstein can be configured to make predictions that will lead to a Lead score for new leads, by using this score a Sales rep can see what Leads are ready to move to closed.
- **Predictive Recommendations** - Based on steps that the team took on previous deals which led to a closed deal Einstein can be configured to make recommendations which will ultimately lead to a closed deal and take the guess work out of next steps.

3.2.4 Integration To ERP- Check Inventory

By using Mule Soft the ability to easily integrate 3rd party applications such as the companies ERP/MRP will give reps the ability to access inventory levels so they know what's in stock or forecast lead time data which is crucial to accurately providing lead time on orders to customers.

3.2.5 Quote To Cash Using CPQ

By utilizing the CPQ module of salesforce a Quote to Cash process can be built that will help your reps turn around accurate quotes quickly and accurately based on the parameters your organization sets on product offerings, pricing and discounts.



- **Configure** - with all the products, components and services that a Sales Organization intends to sell to its customers. There can be multiple combinations of their offerings which can be presented to prospects as at times the customer themselves don't understand their needs.
- **Pricing** - can be as simple as multiplying the number of products with unit price and becomes once the pricing rules, discounts, sales/state tax, bundle pricing and multiple price book management comes into context.
- **Quote** - is where it is all tied together with a well formatted presentation of the products, prices and other terms and conditions for the selling agreement which the internal Managers approve first and then the customers' signs to process the orders.

Once you have the basics down, now it's time to really get the most out of CPQ by building in Quote Approvals, discount control, bundling options, recommended products, volume based pricing options, multi-currency support, and credit and charge management through the use of standard CPQ functionality or even 3rd party apps to make the experience even more intuitive.

The final aspects of CPQ can be found under the financial chapter.

3.3 Service

With Salesforce Service capabilities your Manufacturing Business can take the next step on our journey to the Full-360.

3.3.1 Case Management

Success in Service starts by effectively anticipating your customers questions, concerns and issues and resolving them quickly. Case management is a collaborative process of assessment, and coordination of options to meet a customer's needs through communication and identification of available resources promoting quality and cost-effective outcomes and an optimum value for the customer. You can:

- Provide Case scoring algorithms that can prioritize case order
- Provide Self-Service portal which can increase customer satisfaction and reduce manual touch points
- Deliver quick and efficient field service options
- Use IoT to stay one step ahead of costly service outages

3.3.2 Call Center- CTI Integration And Soft Phone

See section 3.1.2

3.3.3 Digital Engagement- Omni Channel Communication

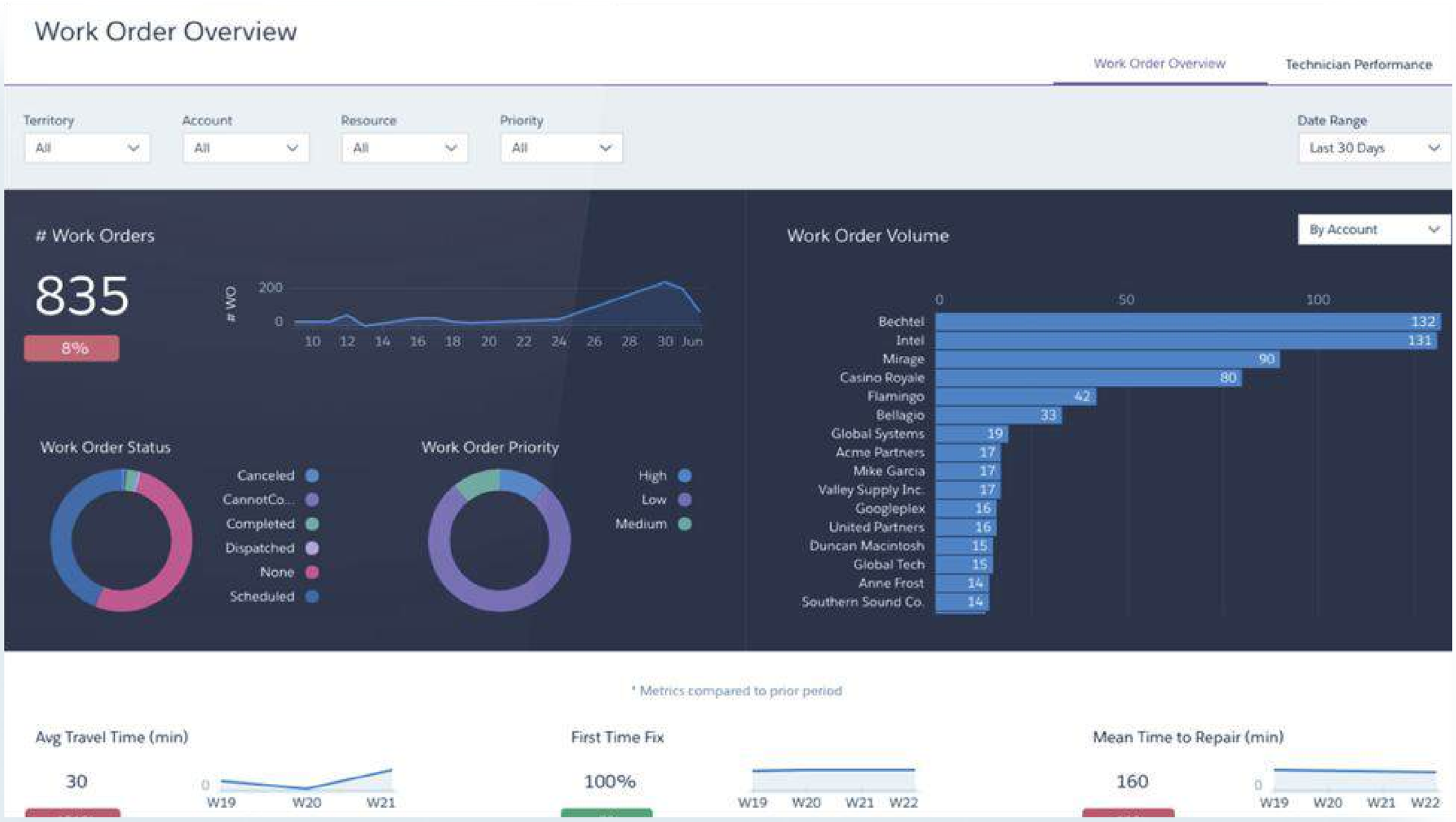
By adding Digital Engagement capability to Service Cloud, service reps are given the ability to communicate to customers on any channel including but not limited to:

- **Inbound and Outbound Messaging** - Drive CSAT with customer-initiated messaging across SMS, Facebook, and Apple Business chat.
- **Live Chat** - Integrate a chat option for website visitors and easily chat with customers and prospect as they visit a website looking for quick answers or next steps.

- **Chat Bots** - Configure a chat bot to help answer customers questions by programmatically configuring answers to customers questions providing a quick resolution to customers queries.
- **Social Customer Service** - In today's world listening and responding to customers across social media sources can be a daunting task. But, by configuring Digital Engagement on Salesforce following up across social media channels can be simple and effective.

3.3.4 Connected Field Service Management

Today the best experience a customer gets anywhere is the expectation that they have everywhere. So, the need to provide service at the highest level to customers has never been more important.



By configuring Field Service Lightning for field service reps, the ability to provide the best possible experience for the customer and receive great CSAT numbers is a reality. Field service lightning helps your service team with the what, how, when, where and for whom of service including features like:

- **Connect** - entire workforce, products and customers on one platform
- **Self-Service** - Customers can book their own appointments
- **Intelligent Ticket Routing** - Intelligently route service tickets to the right resource based on location, skills and business rules
- **Dispatch Scheduling** - Dispatchers can fill in schedules respond to emergencies and coordinate mobile resources
- **Interactive Territory Map** - Real time interactive map of field operations which help dispatchers take territories and traffic into consideration
- **GPS Integration** - Field technicians get directions using the mobile application that will guide them to the next appointment
- **Inventory Management** - Field service agents can update parts and inventory, access service bulletins and resources and attach photos to the service report

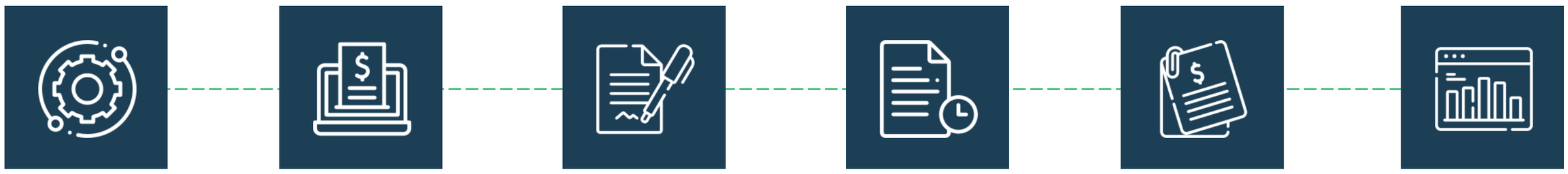
3.4 Finance

With Salesforce CPQ and process capabilities Manufacturing Businesses can take the next step on our journey to the Full-360.

3.4.1 Billing Using CPQ

To close the loop using CPQ we circle back to our quote to cash lifecycle. Billing is the most important stage of Quote to Cash life cycle. The moment a Quote is presented to a client and they have closed the deal, someone in the organization needs to raise the invoice for the client. The Finance/Billing team, being crucial a stage in QTC cycle, needs to be highly responsible from the time an invoice is raised to the collection of payment. Here are the steps the Finance team will take with Salesforce and CPQ.

- **CPQ Automation** - Once the rep closes the deal and its closed won, the system will generate the order which in turn signals the invoicing process seamlessly.



- Finance can track Charge type, billing type next billing sate and billing frequency on one easy to read screen.
- Consumption based billing is a breeze with Salesforce as well by integrating customer usage automatically with Salesforce.
- **Invoicing with CPQ** - When it's time to invoice finance automatically gets the info the need across all types of products thanks to Salesforce billing.
- Set re-occurring invoicing in Salesforce so invoice that need to go out weekly monthly yearly and so on will go out without a hitch.
- Accept and track payments by line item and keep invoices up to date and send customer data to the ERP system.
- **Contract Amendments** - When a client is looking to amend their contract CPQ easily handles this by letting Sales make the changes they need while billing automatically gets the updates.

3.4.2 Salesforce To Drive Data Driven Decisions

Managing hundreds of vendors from around the world makes it critical for Finance to track invoicing and contract terms with up-to-the minute information. For example, when a vendor causes a product delay, or when Procurement engages in future contract negotiations with a specific vendor both resulting into major business impact.

- **Metadata Driven Architecture** - By using a mix of custom and standard objects, every vendor, contract, and order is accessible for tracking, analysis, and actions. With the Salesforce Platform, analysis is easily done with dashboards and lenses that provide real time insights; IT empowers finance with automated, intelligent workflows; that help manage contracts, logistics, and global category spending.

3.5 HR

With Salesforce your HR department at your Manufacturing Business can take the next step on our journey to the Full-360.

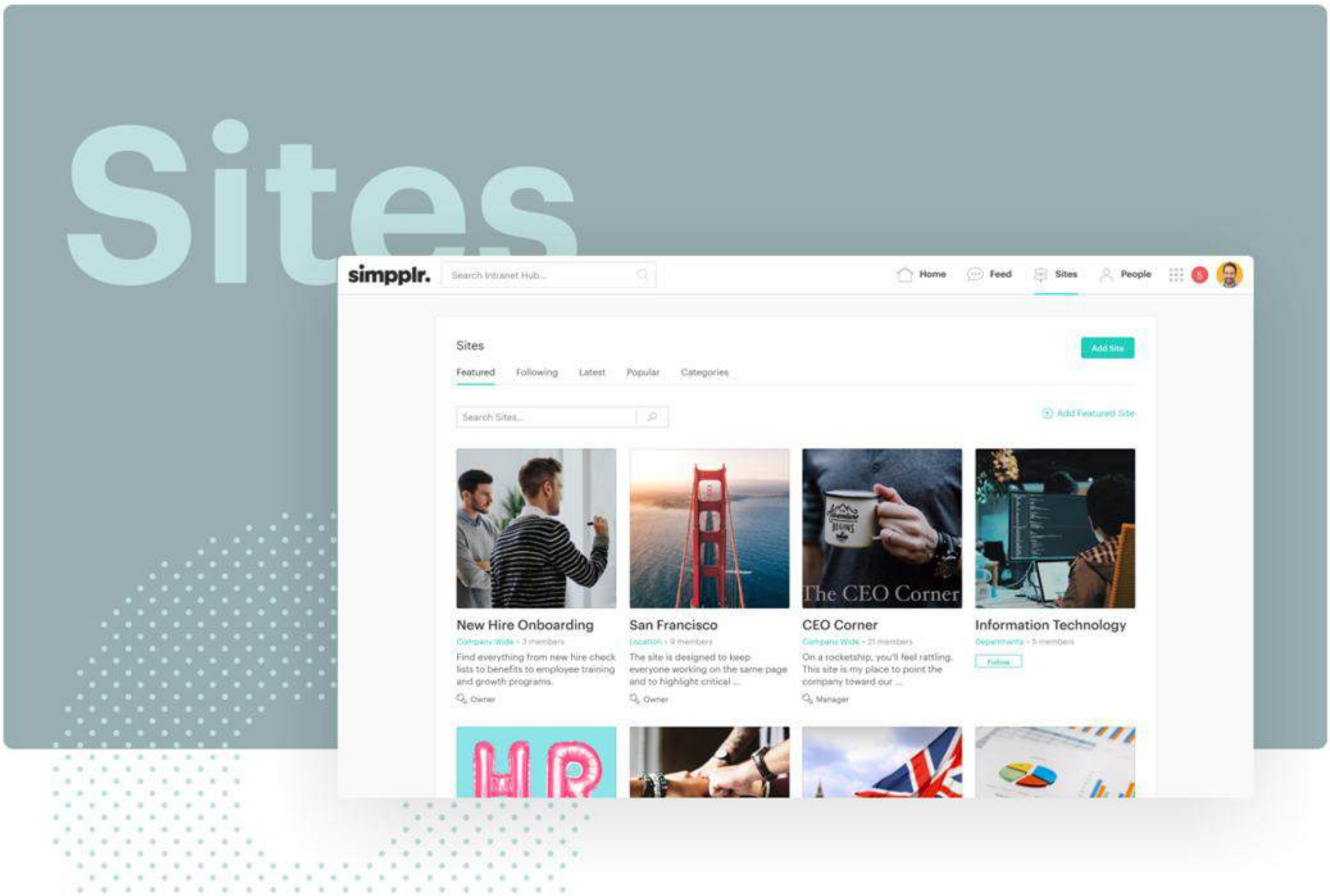
3.5.1 Training Registration App

Insure employees have the right skills for the job is a top priority for the HR team. A custom app can be created on the Salesforce Platform that helps employees find training and certification classes for their specific training programs.

- **Certification Custom Object** - By building a custom object for certification and using Salesforce's open APIs, we can connect employees to the company's HRIS system.
- **Build it Mobile** - Once the app is complete distribute it on mobile for increased ease of use and adoption.
- **Certification Tracking** - Since all employee's certifications are being tracked on Salesforce platform the company can verify the training history of the person who last used it. Or even alert the HR team when an employee is needing to update their certification.

3.5.2 Employee Portal

Create a self-service collaboration space using Employee portal competing with the likes of Facebooks in the user experience and feature parity. There are pre-built apps like Simpplr that comes with rich functionality built for Employee Connection. There is an option to build portals using Salesforce Employee portals.



3.6 Supply Chain

With Salesforce the Supply Chain department can take the next step on our journey to the Full-360.

3.6.1 Supply Chain Custom Alerting App

Supply chain managers need an end-to-end view of the supply chain so they can proactively address bottlenecks and ensure customers receive products on time. To do this, a custom app may be built for them that:

- Signals an alert if there's a delay in delivery of critical components so managers can coordinate with alternate suppliers to keep the production line humming.
- Leverages data from service calls, which are created as Cases in Service Cloud, can identify faulty components, which can then be addressed with the supplier.
- Combines sales and forecast data in Sales Cloud is used to more accurately update the procurement and supply needs immediately.
- Pulls inventory data from the company's legacy ERP through Mule soft integration.

3.7 Factory Floor

With Salesforce the Factory Floor at your Manufacturing Business can take the next step on our journey to the Full-360.

3.7.1 Factory Floor Custom Equipment Maintenance App

In manufacturing, equipment uptime is mission critical to ensure delivery dates are met and customers are happy. Worker's can immediately notify facilities of broken equipment by scanning a code on the impacted equipment. To do this, we may build them a custom app that:

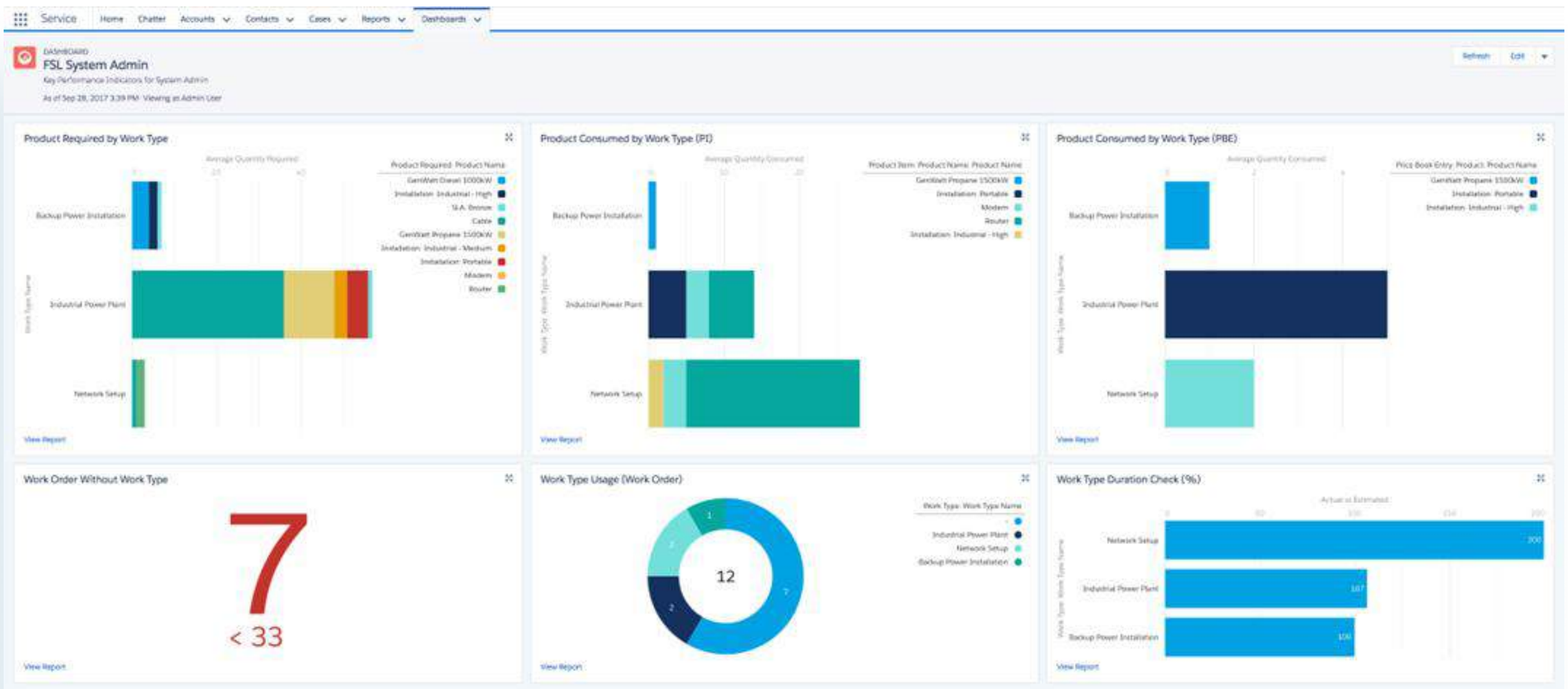
- Alerts maintenance when equipment fails through a custom app built on mobile.
- Dispatches the best available technician based on skill set and availability.
- Identify Sales opportunities which may be at risk of delay based on customer data

3.8 IT

With Salesforce IT at your Manufacturing Business can take the next step on our journey to the Full-360.

3.8.1 Enterprise Grade Tools For IT

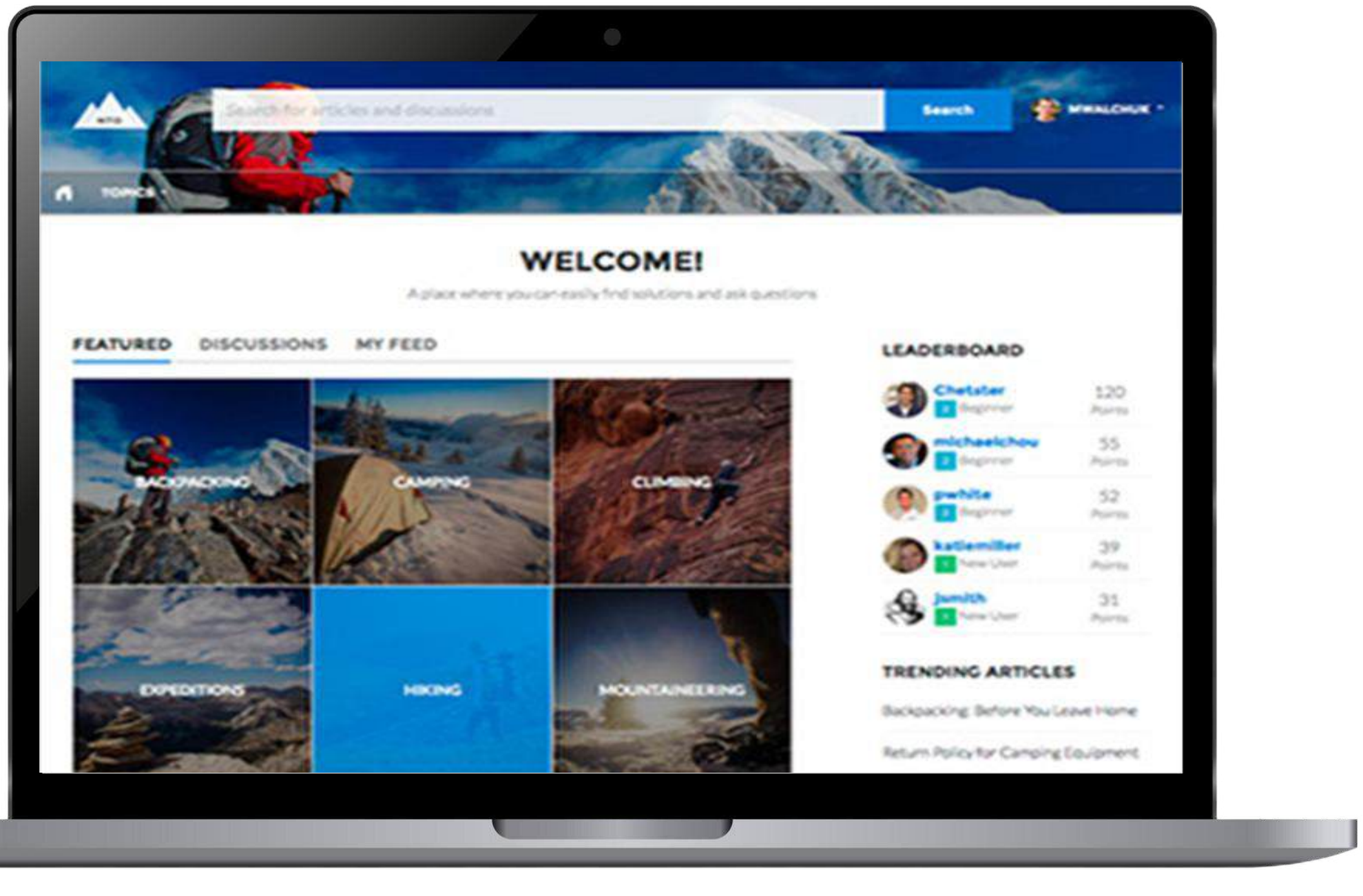
The Salesforce Platform includes a suite of enterprise-grade tools and services that IT can use to build powerful apps while also providing oversight to ensure that every app is secure, connected, and meets governance and regulatory standards.



- **CIO Dashboard** - Because of the meta-data driven nature of the Salesforce Platform, the applications, reports, and dashboards built on the platform use objects and their relationships to one another. This creates a framework focused on re-usability and innovation, allowing IT to focus on business results. This custom-built CIO dashboard gives IT a bird's-eye view of all of the current apps in flight — and how fast employees are adopting them.
- **Project Management Tools** - When starting new project IT can integrate great PM tools to track upcoming sprints allowing them a full-360 into IT projects.

3.9 Self Service Customer Portal

Once the internal systems are all connected with Salesforce, connect your customer to it through a self-service branded portal through Salesforce Community portals. Unlike the old days when creating self-service Customer Portals would have a long pain project, Salesforce based portals can be easily built. The best part is that there is no need for integration as the portal is already built on top of Salesforce.



Typical use cases for a Customer Portal include:

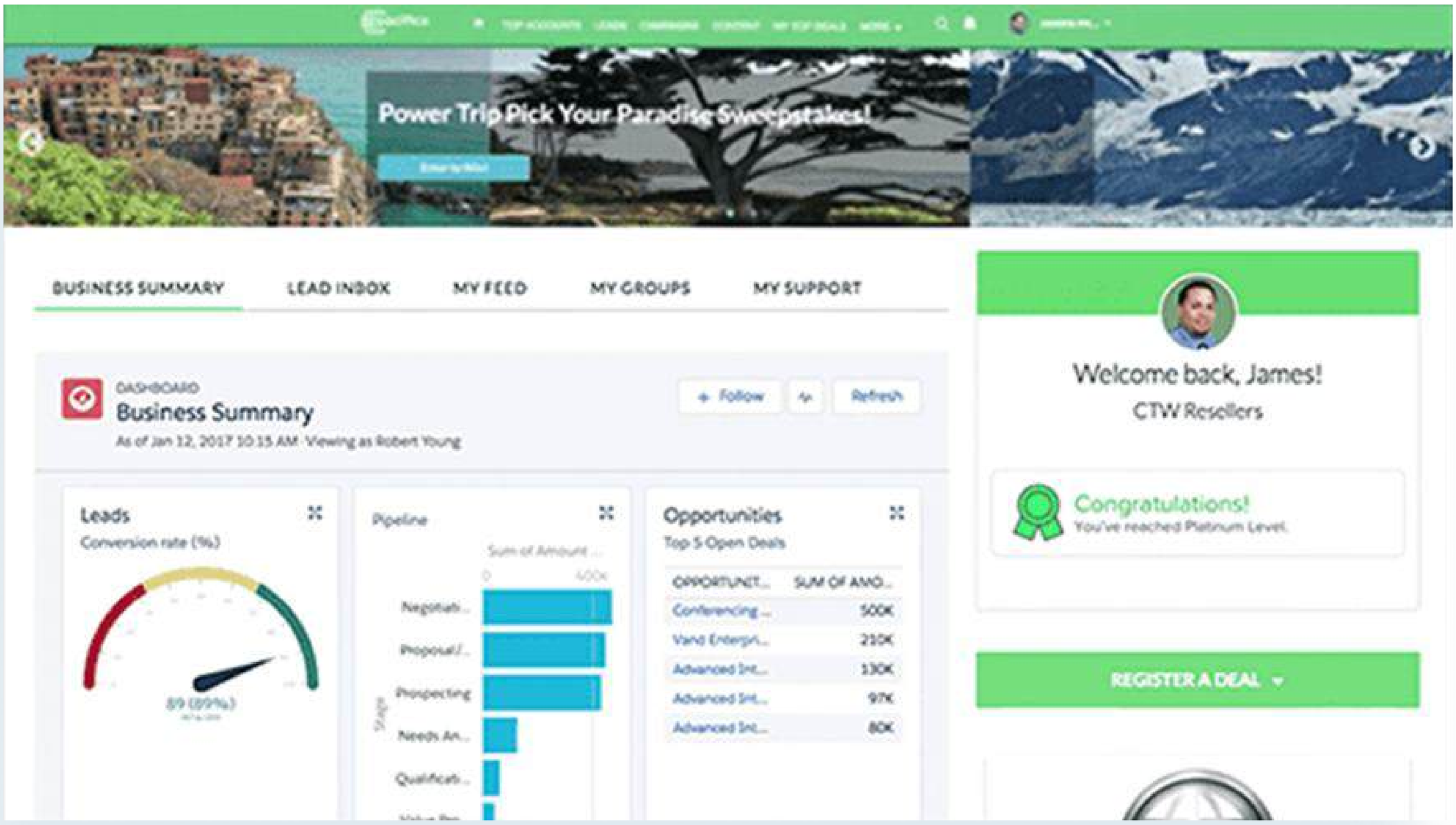
1. Online eCommerce platform (both b2b and b2c settings)

   - Product Selection, Quotes, Order Placement, Shipping Integration, Order Tracking, Return Process, Payment, Inventory Management

2. Self-service Case Management
3. Knowledge Management and Knowledge Sharing (how to videos, documents etc)
4. Customer Community Forum
5. Can implement customer forums and track conversations across different topics

3.10 Vendor/ Distributor/Partner Portal

Create self-service portals for your Partners, Vendors and Distributors using Salesforce portal platform.



Integrate Salesforce with your ERP (Inventory Management, Finance and Partner Management) and enable the following capabilities:

1. Partner Profile Management
2. Invoicing / Payment tracking
3. Case Management
4. Order Management - place orders to and from a partner
5. Customer Complaints Insights
6. Knowledge Sharing
7. Reports / Analytics
8. Contract Management and Tracking

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