



## Salesforce Solution for Tracking Sales Performance

### Challenge

- Sales team and its Managers want leverage Salesforce to track their weekly, monthly and annual sales
- Use reports to track their sales numbers, which get lengthy and difficult to compare and analyse
- Sales managers buried in data details, with less time to focus on sales
- Need for a system to easily track and compare current sales with their Target and previous year's sales

### Our Solution

- Made reports to pull weekly, monthly or annual information according to the data required.
- Created Dashboards using reports for compact look and quick analysis.
- Detailed reporting on where opportunities are being driven from and sales activities generated.
- Trained and educated employees on the benefits of migrating to Lightning User interface.

### Business Benefits

- Graphic representation of key metrics helps keep handle on business performance.
- Ease of monitoring and calculating an individual's Sales performance
- Ease of comparing current sales numbers with target and historical sales performance

### Client Background

- Award winning Australian distribution company into business of delivering small beverage accompaniments and bite-size coffee treats and savoury bites to over 22 million Australians
- Products include beverages, cookies, chocolates, hot and cold drink accompaniments, gift hampers etc.
- Have won over 130 Royal Fine Food Awards.
- Sales team works in multiple geographies and orders delivered on all days of the week
- Use Salesforce to manage Accounts, Contacts, Orders (Opportunities)sufficiency

## About CloudChillies

CloudChillies' Salesforce Certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. Our team has 15+ years of experience in all facets of Salesforce, covering cloud advisory, Salesforce integration services and Force.com platform development. We assess your needs to provide maximum value through IT to greaten your impact and achieve your mission.



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