



Decimating competition with Saleslogix

Caterpillar Dealer

Client Background

One of the largest dealers for Caterpillar worldwide, the company operates across multiple countries in the Middle East and serves public and private commercial businesses. The company provides specialized solutions to the construction, mining, oil and gas, agricultural, power generation, material handling, and transport industries.

The Challenge

The company's vision was to be the largest and most respected solution provider in its identified markets and grow its business exponentially in a super-charged but highly competitive environment.

A sub optimal implementation of Saleslogix was holding it back in various areas – remote sync issues were resulting in delayed (and sometimes zero) availability of information); sales persons could manipulate the system by punching in back-dated data; targets could not be met as the sales planning module had issues; decision making was impacted due to all of the above.

The dealer was also not able to capitalize in time on upsell and cross-sell opportunities in a market where its customers were growing their own businesses rapidly and demanding real-time responses from their suppliers.

“With help from Ambit, we are truly able to leverage the benefits of an enterprise CRM system. Our sales & service teams are now able to deliver a far superior customer experience”

- Sales Head

The Solution

The company was on the verge of replacing Saleslogix with a competing product when Ambit stepped in and showcased the capabilities of Saleslogix version 8 with its powerful and high-performance web and mobile clients.

Ambit upgraded the implementation to Saleslogix version 8 and all the thick client features were rebuilt in the web client. Validations were built into the web client to ensure that manipulation could not be done. The sales planning module was revamped in the web and additional reports for potential upsell and cross-sell and sales commissions were built into the system.

Saleslogix mobile with basic customizations was also implemented to provide users with data access on the move. Additional features are being built currently to allow the users to provide a quick quote to the customer from Saleslogix mobile.

A competition tracker was created along with a discount approval mechanism so that every opportunity could be assessed in its entirety and quick action could be taken for closing deals.

KnowledgeSync was configured to provide automated alerts and reports distribution to branch managers. Alerts are sent out when opportunities are not updated for a period of time, when customers have not been met for a month's time, a new competitor has entered an opportunity, warranty and contract expirations, etc.

Business Impact

- Moving to the web client from a remote client helped with collecting real-time updates and improved productivity.
- Upsell and cross-sell sales have increased significantly as compared to the past.
- Accurate sales commission reports ensured a highly motivated sales force as they received timely commissions.
- Saleslogix Mobile allows the sales persons to spend more customer-facing time resulting in higher revenues
- Alerts and scheduled reports help branch managers and senior management in quick decision making and winning deals away from competition.
- Sub-par performers in the sales teams are quickly identified and appropriate action is taken to help them, thereby increasing the average revenues per sales person

About Ambit Software

Ambit Software helps enterprises globally to become agile - adapt rapidly and cost effectively in response to changes in the business environment through the efficient use of IT. Ambit partners with its clients to understand their business pain points and arrives at appropriate IT led interventions to deliver a relevant solution.

Ambit helps organizations across sectors such as Discrete and Process Manufacturing, Financial Services, Logistics, Consumer Goods, Hospitality etc. to achieve their business goals through effective use of technology.