

## Large Window Manufacturer



**everge** – GO LIVE SUCCESS STORY

**Modernized Field Sales, Service by Migrating to Salesforce – Implemented in less than 6 months for 1000+ users**

 **Salesforce Products**



## Company Information

A privately held window and door manufacturing company with manufacturing and sales operations in several locations in the US

## Why everge?

Over two decades of experience with Field Sales, Dispatch, and Service

Experience in migrating enterprises from Oracle platforms to Salesforce, including accelerators

## Business Challenge

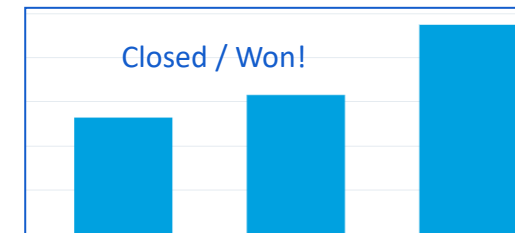
- **Limited Digital Capabilities** including manual territory management, extremely difficult order entry/update processes, and weak dispatch capability
- **Multiple CRM Platforms** across several business segments resulting in a variety of limited CRM processes. These include EBS CRM, two instances of CRMOD, and MS Excel.
- **Lack of 360° view of customers** across Sales, Field Sales, and branch management due to multiple platforms and incomplete integration
- **No Mobile Capability**
- **Limited Customer Interaction** very manual process to communicate prior to appt. caused many cancelations

## Success Outcomes

- **Streamlined Appointment Booking** – enabling reps and branch managers to automate and accelerate appointment booking
- **Mobile** improved planning and work on the go as reps can easily map to client locations and track activities throughout sales cycle
- **Live ERP integration** – Integrated with Oracle EBS to provide installation and delivery data within Salesforce
- **Virtual Appointments** – Implemented 5 days after go-live to adjust for Covid-19 practices while allowing business to continue



*Wow, impressive is an understatement! In a short time, this team will have enabled NATIONAL CAPABILITY of Virtual In-Home Appointments.*  
– Director Sales Subsidiaries & Replacement



**Get in Touch**



**Shay Sanders,**

Sr. Director CX Cloud

shay.sanders@evergroup.com