



LIFT-UP FOR MATERIALS HANDLING EQUIPMENT FIRM IMPROVES DEALER EXPERIENCE WITH NEW CONFIGURATION, SALES, AND QUOTING CAPABILITIES

Overview

Southworth Products Corp. is a leading manufacturer of materials handling equipment for vertical lifting and work positioning. With a growing dealer network and the recent acquisition of a competitor, the company wanted to quickly build a dealer portal with lead/quote management and configuration/ordering capabilities.

Challenge

The company was limited by its small-business-oriented CRM. They had difficulty managing leads, passing them along to company sales managers and dealers, and tracking the opportunities created. An out-of-the box instance of Configure One Cloud was used by sales reps for custom product configuration.

The project goals included improving the dealer experience, streamlining lead follow-up and tracking, accelerating quotes, and implementing a dealer portal that would support future enhancements.

Solution

Leveraging its materials handling experience, ForeFront implemented Salesforce Sales Cloud. We configured the CRM, lead management, and reporting. Salesforce Experience Cloud was used to build a robust portal to enable lead-sharing with dealers while providing online visibility into leads, opportunities, and configuration.

Customizations to Configure One Cloud enabled online configuration and ordering via the portal. ForeFront utilized our any-to-any integration expertise to connect to Configure One Cloud and Syteline ERP to Salesforce, creating a single, shared set of price, product, and customer data.



Salesforce Sales Cloud
Salesforce Experience Cloud



Global Material Handling
Equipment Market: \$220 Billion



Outcome

Southworth now provides its dealer network with an improved online experience, streamlined lead flow, faster quoting, access to lead and order statuses, visibility into quote/order statuses, and a 360-degree view of their sales pipeline. Southworth benefits directly from improved reporting and better insights into the lead-opportunity-purchase lifecycle.

The materials handling industry is evolving. ForeFront builds reliable, integrated systems to support growth.



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