

SUCCESS STORY

Automotive Manufacturer and Distributor

VALUE DELIVERED

- ✓ Demonstrated **deep Salesforce expertise** while minimizing unnecessary customization and complexity.
- ✓ Provided a strong transformation **governance framework** that helped build stakeholder confidence throughout the engagement.
- ✓ Showcased **AI capabilities** that the customer viewed as a means of increasing delivery productivity and quality.
- ✓ Leveraged **industry experience** and customer references to establish trust and differentiate from competing implementation partners.



OSF | DIGITAL

Empowering Field Teams with Intelligent Sales Recommendations and Mobile Execution

Customer Profile

A leading manufacturer and distributor in the Automotive aftermarket and energy storage sector, **serving more than 60,000 retail locations** through its own distribution network.

Challenge

- ✓ Needed to replace a **legacy sales platform** that could not support future growth and scalability requirements.
- ✓ Sought to improve sales efficiency, field execution, and process standardization across a **large distribution network**.
- ✓ Needed to **track B2B orders** for out-of-stock items and address them when the product is available.
- ✓ Wanted a unified view of customer information and more **efficient reporting capabilities**.
- ✓ Aimed to **enhance mobile user experiences**, support offline operations, enable flexible pricing, and increase productivity through AI-driven capabilities.

Outcome-Driven Solution

- ✓ Implemented **Salesforce Consumer Goods Cloud Retail Execution (REX)** for the customer's distribution network.
- ✓ Integrated the solution with the customer's **ERP system using MuleSoft** middleware.
- ✓ Delivered a mobile-enabled platform with offline capabilities to support field teams.
- ✓ Introduced **Agentforce** to provide intelligent recommendations, sales guidance, task prioritization, route optimization, and automation.
- ✓ Established a roadmap for enhanced reporting, lead nurturing, advanced priority scheduling on **Salesforce Maps**, and flexible pricing and discount management.

Customer Adoption

- ✓ **Adopted by field sales** and distribution teams responsible for customer visits, sales execution, and account management.
- ✓ Supported through a **phased transformation** approach, enabling a transition from legacy processes to a modern retail execution platform.
- ✓ Empowered users with improved visit planning, routing, sales execution workflows, and **AI-assisted decision-making**.

- ▶ **Increase revenue potential**
Improve sales efficiency while enabling cross-sell and upsell opportunities
- ▶ **Optimize Field execution**
Empower sales teams with better routing, visit planning, and AI-driven recommendations
- ▶ **Improve operational efficiency**
Standardize processes, consolidate reporting, and lower service costs across the organization

PRODUCTS

Consumer Goods Cloud REX

Agentforce

MuleSoft