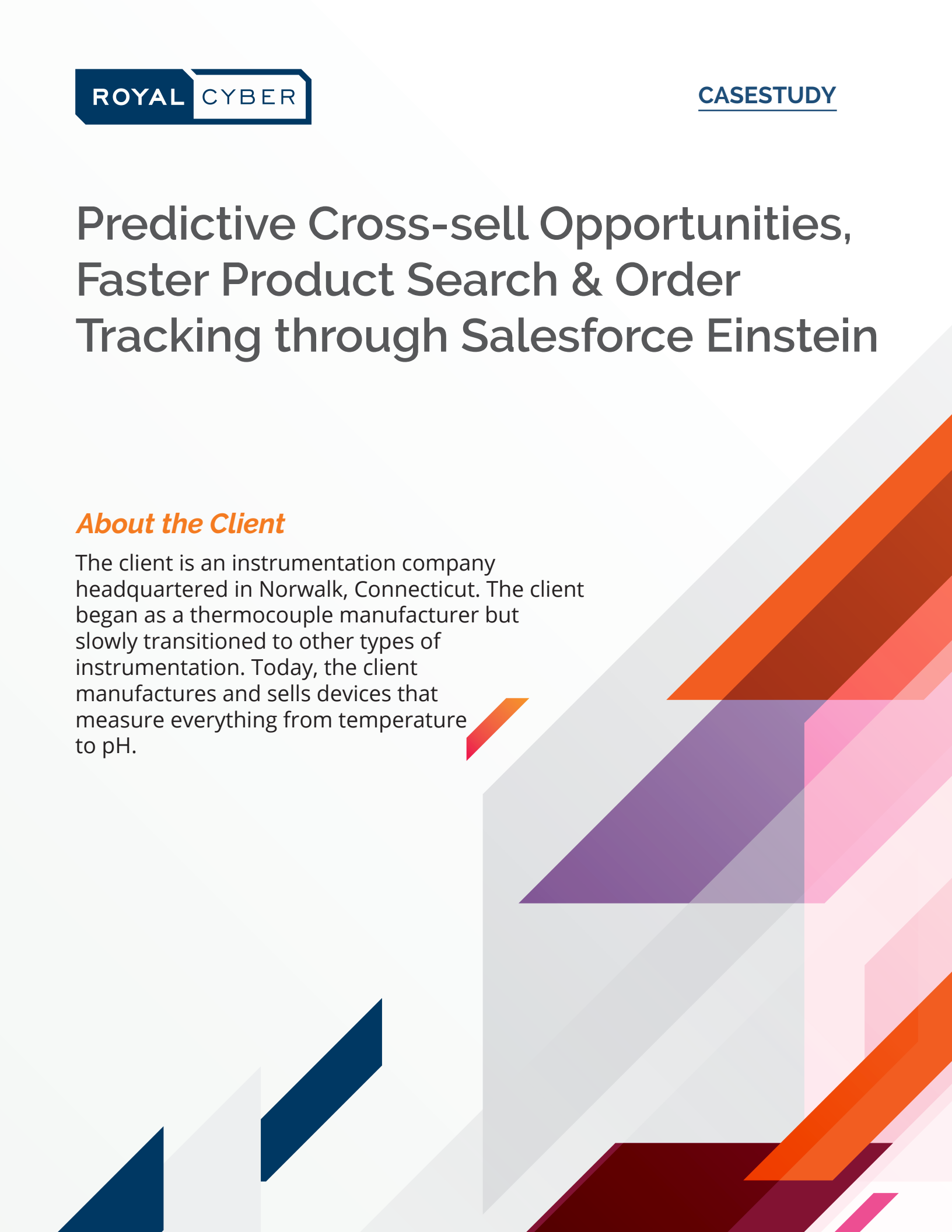


Predictive Cross-sell Opportunities, Faster Product Search & Order Tracking through Salesforce Einstein

About the Client

The client is an instrumentation company headquartered in Norwalk, Connecticut. The client began as a thermocouple manufacturer but slowly transitioned to other types of instrumentation. Today, the client manufactures and sells devices that measure everything from temperature to pH.



At a Glance

INDUSTRY | Manufacturing

LOCATION | USA

USE CASE

The client wanted to see predictive product selling opportunities.

CHALLENGE

The challenge was to reduce the time of the customer to search for the relevant product

Business Challenges

- 1 The client wanted predictive lead scoring in Salesforce.
- 2 The client wanted to see predictive product selling opportunities for the customers who have not bought.
- 3 They wanted to know what opportunity insights they can get against their accounts.
- 4 They wanted to see those opportunities in dashboards for easy understanding.
- 5 All sales agent should be able to see cross sell opportunities on their screen while talking to the customer.
- 6 The data behind the dashboard should be live
- 7 The client wanted their customer to take less time searching for the relevant product or tracking their orders.
- 8 Their high priority customer reported that they stay for approximately 1 hour to search for the relevant product.

Our Approach

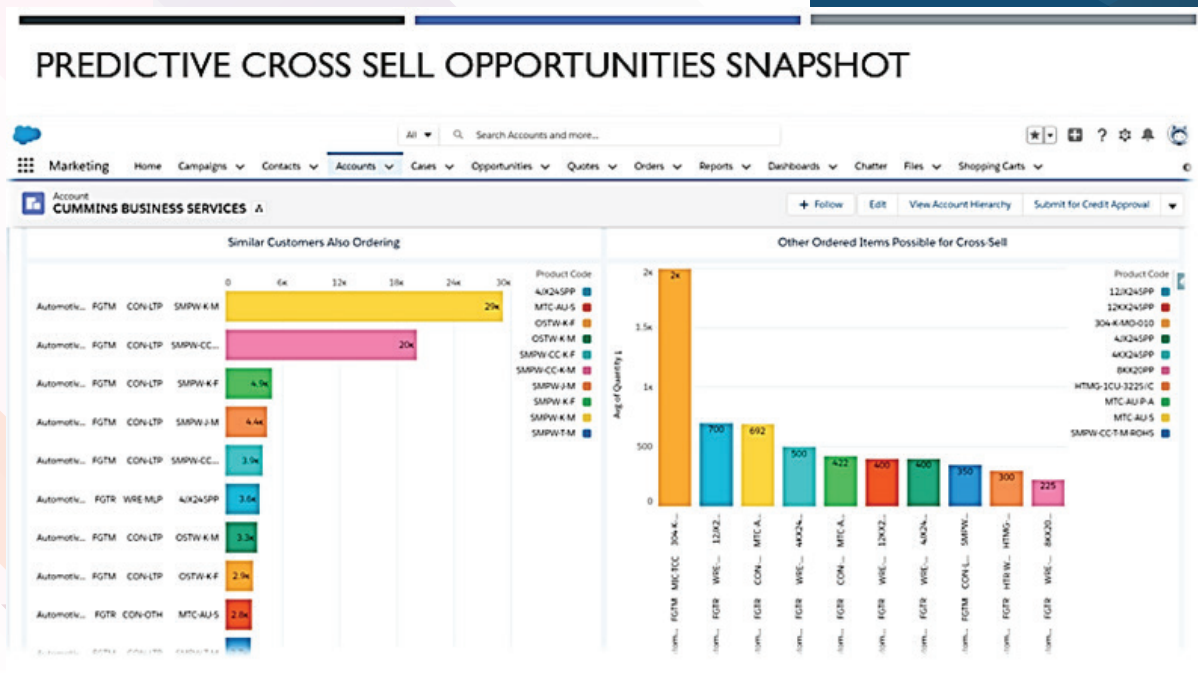
To overcome these business challenges, we looked for a single solution that could achieve all this. That's where Salesforce Einstein came in. Our approach was as follows:

- 1 We started analysing the historical buying pattern of customers using Einstein.
- 2 Based on the patterns, we cross-referenced those customers who bought something from our customer once, regularly or multiple times over the year but did not come back.
- 3 Then we correlated those customers with the industry they belonged to.
- 4 After acquiring that data, we started matching the customers who belonged to the same industry and what they were buying.

- 5 Then we built logic to check for all those customers who had not purchased a product that the other customers from the same industry were buying.
- 6 Finally, we converted all of that into a live dashboard which was displayed on all of the screens of sales rep whenever they logged into Salesforce.
- 7 We configured the dashboard so that whenever the customer calls the sales agent, that dashboard would pop up on their screen, telling them immediately which product has the opportunity to be sold to the current customer.
- 8 The cross-sell opportunity only showed those products which the customer had not purchased in the past.
- 9 A guided selling was implemented, which decreases the search time.
- 10 It was an in-depth flow created considering the external website structure in focus.
- 11 Einstein-bot is an efficient way to cater the average-case handle time for reps. In addition to web-to-case, and implementing Salesforce social, the embedded chat functionality with Einstein bot, enabled the intelligent answering system, which was trained to read different opening messages and writing pattern.

SOLUTION

Royal Cyber leveraged Salesforce Einstein to analyze customers' buying patterns to serve their needs better. We configured the dashboard so that whenever the customer calls the sales agent, that dashboard would pop up on



Results

- ① Sales reps got a higher success rate for cross selling more products to their customers.
- ② They got the information which products are hot items in which Industries.
- ③ They started understanding the buying behavior of their customers.
- ④ Sales reps sales increased.
- ⑤ The sales reps got the opportunity to bring back some of the lost customers.
- ⑥ The customer can perform a search of relevant products within minimum time.
- ⑦ The customer is able to track the orders successfully.

About Royal Cyber:

Simplifying IT for Customers & Partners

Royal Cyber Inc. Headquartered in Naperville, IL is a leading software organization that provides services ranging from application development and deployment to training and consultancy. We commenced the operations in the year 2002 as a specialized Technology provider striding in as a software deployment service provider, assisting clients to meet the standards and demands of doing business in the rapidly changing marketplace. Today we stand tall as a **One Stop Shop for all your IT needs.**



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