

SUCCESS STORY

Global Industrial Manufacturing Organization

VALUE DELIVERED

- ✓ Delivered a **multi-country CRM** transformation while standardizing processes across regions.
- ✓ Completed **data preparation and migration** while enabling end-to-end sales, service, and field service operations.
- ✓ Applied a consultative approach to align the solution with **business strategy**, culture, and growth objectives.
- ✓ Established an **ongoing partnership model** supporting continuous optimization and future expansion.



OSF | DIGITAL

Modernizing Sales and Service Operations with a Unified CRM Platform

Customer Profile

Our customer specializes in advanced machinery and equipment solutions. The company **operates across multiple international regions** and employs thousands of people.

Challenge

- ✓ Replace manual, spreadsheet-driven sales and service processes with a **modern CRM platform**.
- ✓ Create a **unified customer view** across regions and business functions.
- ✓ **Improve customer experience**, operational visibility, and employee productivity.
- ✓ Establish a scalable foundation capable of supporting **international expansion** and standardization efforts.

OSF Outcome-Driven Solution

- ✓ OSF implemented **Sales Cloud, Service Cloud, and Field Service** to create a single source of truth across multiple countries and business units.
- ✓ The solution **unified customer data** and digitized sales and service processes.
- ✓ **Integrated field operations** and established a scalable CRM foundation designed to support future growth and regional expansion.

Customer Adoption

- ✓ Sales, service, and field teams adopted a **centralized platform** to manage customer interactions and **operations**.
- ✓ OSF supported adoption through a **consultative engagement approach** focused on aligning technology with business processes and organizational goals.
- ✓ **Continued support, maintenance, and future rollout** planning helped sustain platform utilization and long-term value realization.

- ▶ **70% admin capacity growth**
Strengthened employee productivity and operational efficiency
- ▶ **360° customer view**
Enhanced CRM capabilities and service channels for unified customer intelligence
- ▶ **Increased upsell and cross-sell**
Greater forecasting accuracy and more relevant targeting

PRODUCTS

Sales Cloud

Service Cloud with Field Service