

Salesforce in Manufacturing: An Architectural Guide for Newcomers.



Introduction

For those in the Manufacturing industry, the transition into Salesforce requires informed decisions to quickly maximize the ROI on your investment.

There are many millions of pages of content on the web from Salesforce themselves and it's sprawling ecosystem, so it can be daunting to begin the process of decoding the information into bite-sized snapshots to inform the buying process..

This guide is written by consultants at the coal face of Salesforce in Manufacturing, and aims to give you a concise overview of the best practices from the work already undertaken in the market.

Contents:

- Best Fit Salesforce Products
- Demand Generation Tools
- Sales & Marketing Flow
- Quality Management & ISO Processes
- Field Service
- Integration
- ETL vs API Integration
- Finance
- Quick Wins vs Complex Projects

Best Fit Products

Salesforce now offers a sparkling array of products, but that can make it difficult to get a high-level view of what's useful for your organization.

Let's take a quick look at which products are most commonly used in the Manufacturing Industry, before going into more depth on the subsequent pages.

Demand Generation

Sales Team



Marketing

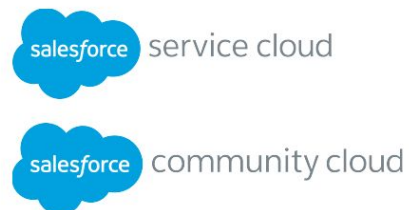


eCommerce

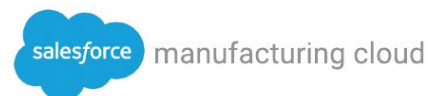


Operations

Customer Support



Manufacturing Specific



Field-Based Service Teams



Billing



Demand Generation

Salesforce boasts a strong suite of tools across Sales & Marketing. Typically, Manufacturing firms that use Sales Cloud eventually take advantage of maps and quote-to-cash functionality to supercharge sales productivity.

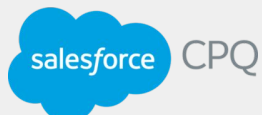
Sales can also be fed with MQLs from within the same platform via the broad spectrum of products now known as Marketing Cloud.



The entry level product for most, Sales Cloud is an engine to nurture leads, manage accounts and develop sales opportunities.



A Maps overlay on Sales Cloud is a great fit for the geography-based 'patch' of a typical Field Sales Rep.



Complex quoting, document generation & contracting / amendment / renewal processes from within Sales Cloud.



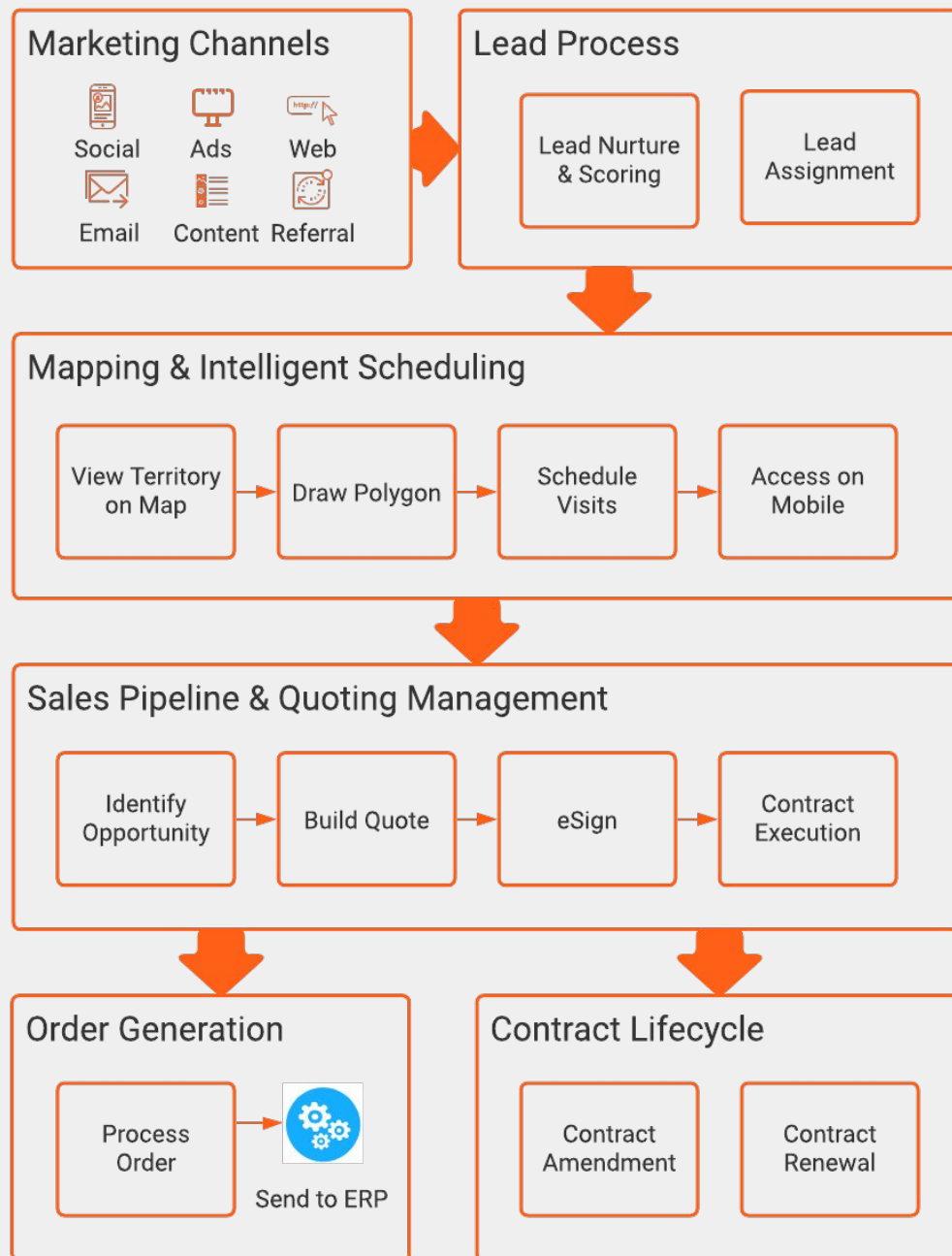
Customer-driven ordering processes in B2B Commerce, bringing the traditional and online sales under one roof.



Multi-channel marketing execution with an array of tools across email, web, social and event management.

Typical Data Flow - Sales & Marketing

From lead generation through to contracting & amendments, a typical Manufacturing organization can benefit from transitioning the following processes into the Salesforce platform where it will be relatively easy to evolve in the future.



Customer, Quality & Channel Management

Manufacturers that have already brought their sales cycle into Salesforce typically then transition in Customer service, ISO Processes, Quality Management and Partner Relationship Management (PRM) to extend the reach of the platform.



Service Cloud tracks customer interactions from various channels from capture through to closure. This area of functionality includes knowledge, SLAs and escalation.



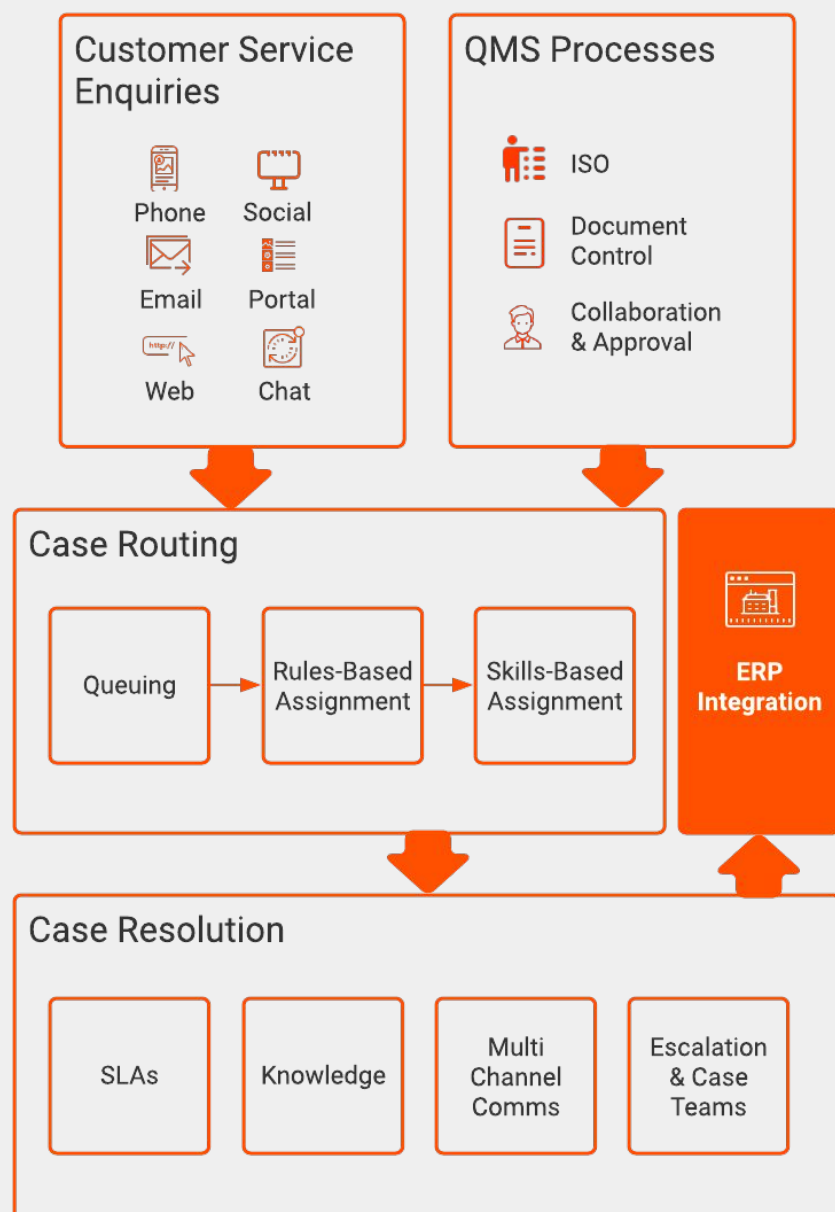
Manufacturing Cloud is a feature-rich industry solution by Salesforce which comes with a number of bolt-on solutions which apply to common manufacturing settings.



Communities can be utilized to collaborate in various contexts within Salesforce - Partner Relationship Management (PRM), Customer Communities & Employee Communities.

Typical Data Flow - Customer Service, Quality Management & ISO Processes.

There are various scenarios which feed into what is known in Salesforce as Case Management. Typically, a manufacturer with many different service & quality related processes will use Service Cloud to provide responsive multi-channel functionality to their various teams.

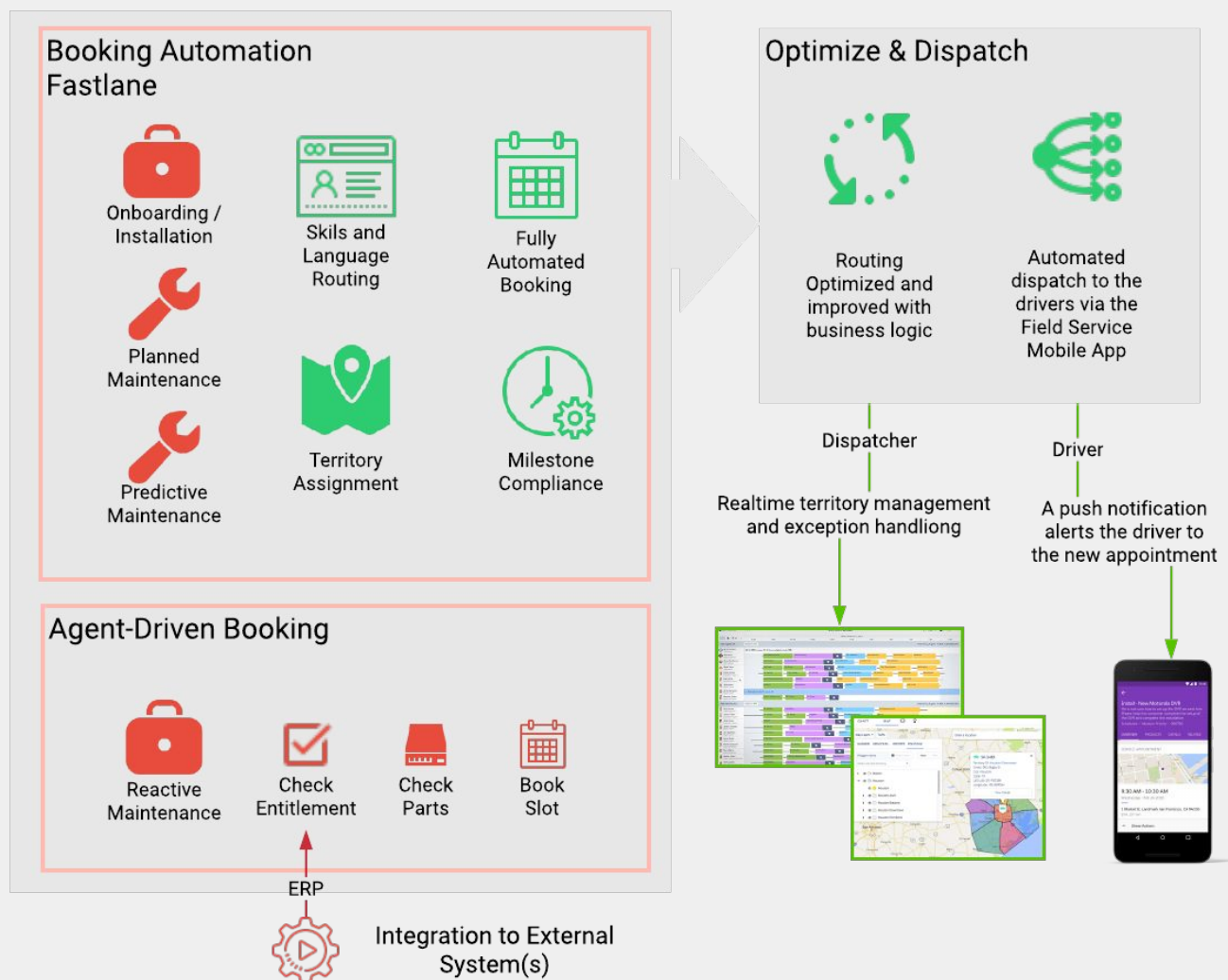


Field Service

Those with field-based teams for customer service often look towards Salesforce Field Service Lightning to be able to automate the creation, scheduling & optimization of field-based work. Field Service lightning offers powerful dispatch & mobile functionality to help manage the complex process of deciding the who, what, where and when.

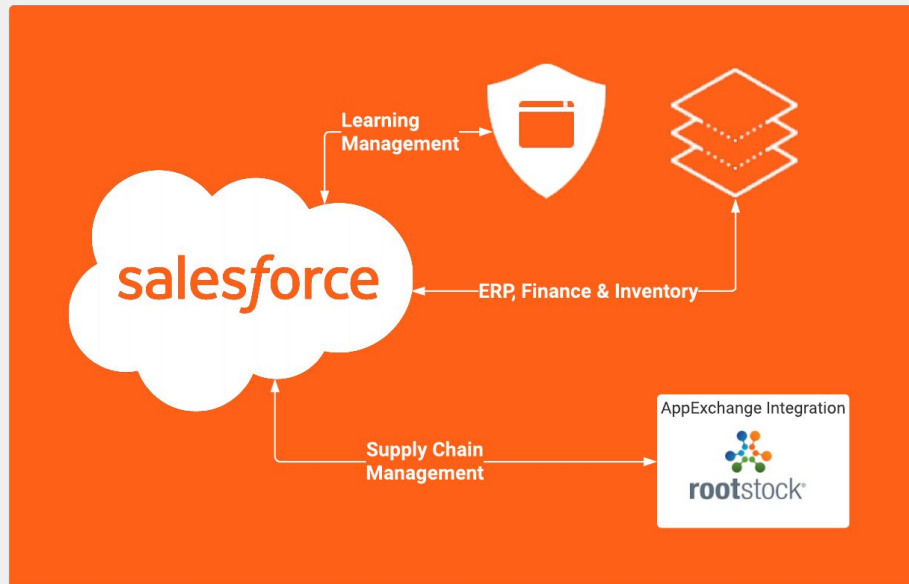


A plug-in to Salesforce Service Cloud which enables scheduling & routing functionality.



Integration

Whether you're in Discrete Manufacturing, Process Manufacturing or Supply Chain firm, the typical Salesforce environment is normally heavily integrated in order to allow complete processes with little or no manual transfer.



For most organizations, once they embark on the Salesforce journey, the customer lifecycle starts in Salesforce, with post-sales processes being connected to ERP and other external systems.

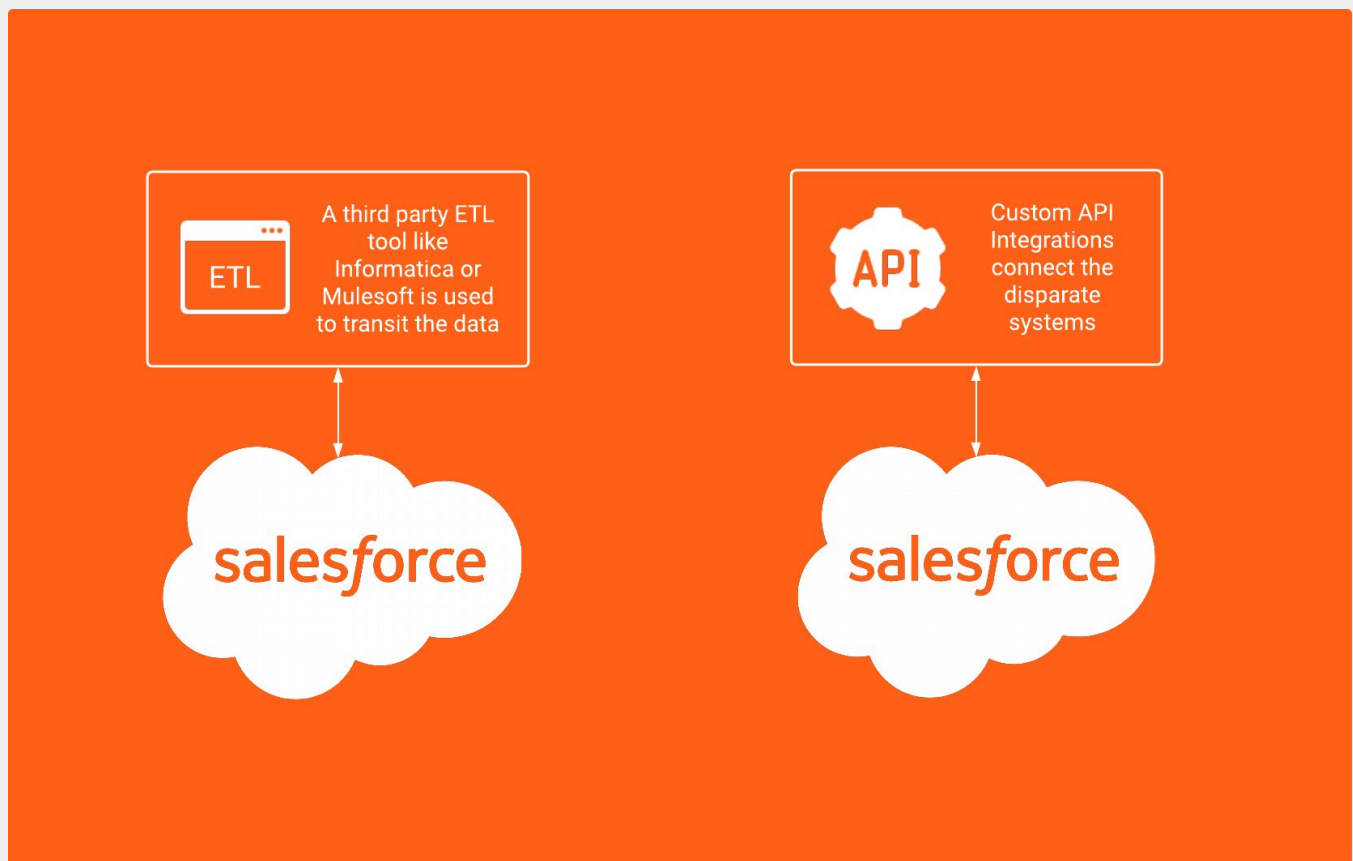
Connectivity is a key focus of most Manufacturing industry Salesforce implementations and transit of data between systems is a large part of what defines a great customer experience.

It's crucial to get the data flowing properly now so competitive advantages can be gained by accessing AI and IoT as they emerge in the coming few years.

Custom Integration or ESB?

Deciding whether to use a custom (API) integration or an ETL is often driven by circumstance. If an existing ESB like Informatica or Mulesoft is already in place, then most prefer to utilize that.

If you're planning to release multiple integrations straight off the bat then an ESB might be a good idea. If you're starting with just one or two integrations and prefer to develop custom than pay licensing for an ESB, then the API might be the answer.



Another consideration is how mature the APIs are on your current systems. The methods of connecting to that interface could dictate the next steps according to the path of least resistance.

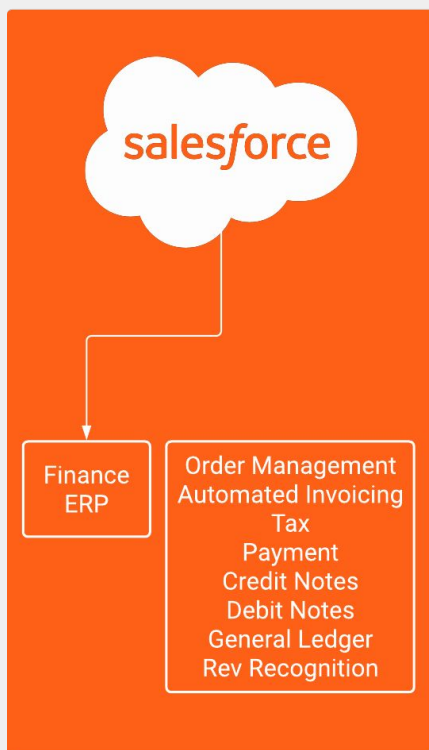
Finance

Integration to finance systems is a uniform objective across the industry, but at what point that integration kicks in will vary depending on the customer. If Salesforce Billing is used, this allows for a later integration to the finance system for Revenue Recognition & GL.



Salesforce Billing allows for Invoicing and other finance-related functionality from within the Salesforce Platform.

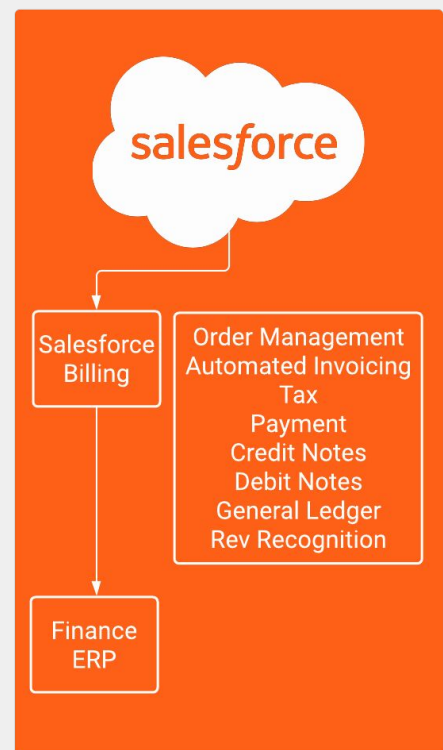
ERP-Driven Finance



Blended

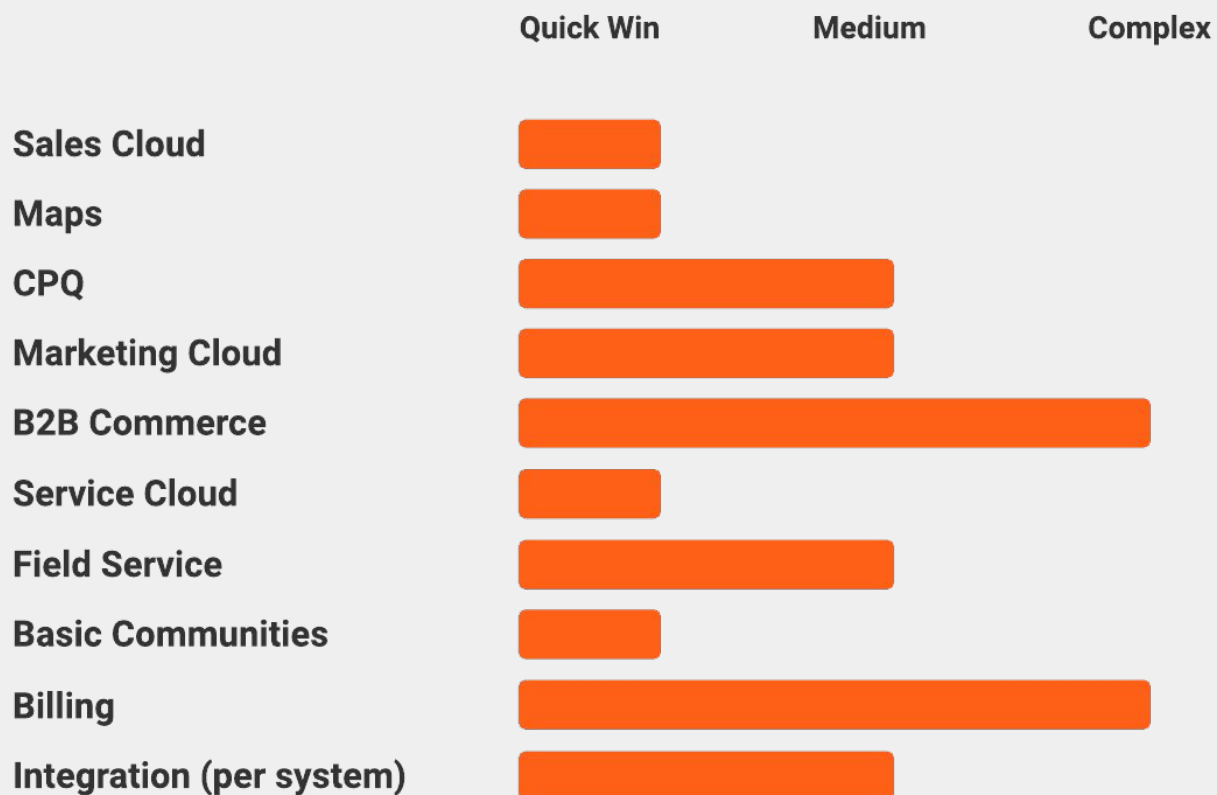


Salesforce-Driven Finance



Assessing Complexity

Coming into the Salesforce world, it's always best to think of it as a journey. Most firms start with the Sales or Service process and build out over a number of years into other areas of the business. For the products we've covered in this guide, we've compiled a handy reference guide to show you where the quick wins are, and what will require more intensive effort.



Brick Lane Factsheet

Brick Lane is a multi-cloud Salesforce partner with an expert-level understanding of the Manufacturing industry.

>12 Yrs

In the Salesforce space

50+

Sales Cloud Projects

20+

CPQ & Billing Projects

>10 Yrs

Manufacturing Experience

20+

Service Cloud Projects

40+

Operational Projects

Leadership Team



Starting as a Salesforce Administrator, Aidan went on to a Salesforce consulting career spanning over 10 years and 5 continents before Co-Founding Brick Lane in 2018. A senior-level Solution Architect, his areas of Salesforce expertise include Sales Cloud, CPQ, Service Cloud, Workforce Planning, and eCommerce.



Robert started his journey in technology over 20 years ago working for Siebel in California. Since then, he has experienced life as a consultant, project manager, program manager and now as a Co-Founder at Brick Lane. Robert's areas of expertise are around Integration, Project Management, Finance, Sales & eCommerce.