CASE STUDY

END-TO-END LEAD-TO-ORDER PROCESS TRANSFORMATION IN SALESFORCE

Industry: B2B Services

Solution: Salesforce Sales Cloud – Lead to Order Automation

CHALLENGE

The sales process lacked a unified structure, with leads coming in from various channels—such as the website, webinars, and live events—without a standardised method to manage, nurture, or convert them. Campaign effectiveness was hard to measure, and sales reps had limited visibility into lead activity. There was also no streamlined workflow from lead conversion to quoting and order fulfilment, resulting in delays, inconsistent follow-ups, and revenue tracking challenges.

OBJECTIVES

The objective was to design and implement a seamless lead-to-order process within Salesforce to improve lead nurturing, conversion efficiency, campaign tracking, quoting, and deal closure. The solution needed to ensure timely follow-ups, track campaign ROI, automate internal notifications, and enforce data integrity through validation rules and approval workflows.

SOLUTIONS

We completely redesigned the lead-to-order process in Salesforce, integrating all lead sources into Salesforce. Leads from the website, events, and webinars were grouped under lead sources and further grouped under Campaigns to monitor performance. A structured follow-up sequence was designed using phone and email touchpoints to nurture leads effectively and convert them into opportunities.
Using Salesforce's standard lead conversion functionality, opportunities were linked to the original Campaign, allowing revenue attribution and performance reporting. opportunities were automatically assigned to sales reps based on vertical alignment, ensuring proper ownership and faster engagement.
We implemented validation rules to enforce data capture at each stage—for instance, capturing BANT criteria during the qualification stage. High-value deals triggered email notifications to the management team, providing visibility and enabling proactive intervention.
Additionally, we revamped the product catalogue and quote generation process using Salesforce's out-of-the-box functionality. A custom approval process was introduced for quotes exceeding predefined value or margin thresholds. Managers received regular notifications to track progress of the opportunity.
Once a deal was marked Closed Won, Salesforce automatically notified the accounting team to initiate invoicing, ensuring timely billing and improved cash flow.

RESULTS

- Streamlined lead capture and nurturing across multiple channels
- Improved campaign tracking and ROI reporting
- Faster opportunity assignment with better sales team alignment
- Increased data accuracy through validation rules at critical stages
- Faster quote generation and approvals, reducing sales cycle time
- Automated handoff to accounting, accelerating the billing process