

An rSTAR White Paper

# KEY INSIGHTS FOR ALL STARS: Salesforce Manufacturing Cloud



*In the past 20 years, we've seen a major structural shift in how manufacturers think of not just their markets, but also their products. The major global changes in trade policies that happened within the last five years alongside the COVID pandemic have changed how we think of managing and dealing with supply chain and operational constraints, commodity shortages, and other important business processes.*

To remain competitive, manufacturers must embrace a digital future. Technology is changing everything from the way supply chains are managed to the way in which customers demand to interact with manufacturers.

In fact, digital transformation is increasingly becoming a determinant factor for manufacturing success and a critical aspect of staying ahead of the competition. According to [Gartner](#), 91% of companies are engaged in some form of digital initiative, and 87% of senior business leaders say digitalization is a priority.

The adoption rate of digital technologies will undoubtedly continue to increase, as [56% of CEOs](#) say digital improvements have increased their revenue. As the manufacturing industry continues adopting more emerging solutions, it's only right to point out that only tech-savvy companies - those that are ahead of the digital transformation curve - will thrive in this environment, make the most impact, and yield the highest ROI.





## The Problem: Siloed Systems and Manual Processes

For companies using legacy systems, it's easy to see where they are lagging behind their competitors who've undergone a digital transformation. Companies that use manual processes can easily hit roadblocks that affect pipeline visibility, delay response times, and create deeper internal silos. One process in particular that hampers many manufacturers is using spreadsheets to track customer data across the relationship pipeline.

This type of siloed system can create a lack of visibility across sales, operations, and product, an absence of discipline around customer relationship management, and discrepancies between planned volumes and revenues versus actual orders.



## The Goal: Undergo a Digital Transformation

Once manufacturers know they want to transition to a modern system, it's important to know what goals this digital transformation should work to achieve.

Typical goals that manufacturers strive for include maximizing resource utilization, optimizing inventory, production scheduling, precise supply chain plans, personalized buying experiences, and automating manual processes.

The main focus would be to have an automated system that connects all data across the company to one central hub – thus making things easier for both employees and customers.

## Becoming Customer-Centric and Future-Ready



The question, of course, is not that manufacturers need technology to advance in this increasingly competitive world. The question is “Which technology will help us the most?”

The answer is surprisingly simple. The technology your company needs is the one that best fits your specific needs to help you build long-lasting customer relationships. One that provides a 360-degree view of customer relationships, and one which helps you acquire, retain, and create loyal customers – all which will boost your company’s bottom line.

Below, we’ve put together a list of questions that must be addressed before you choose a platform to help your manufacturing company offer value-added services, either directly to customers or in partnership with distributors. Such services will enhance competitiveness and help your company build towards a customer-centric model, which we believe is the key to long-term success for manufacturers.

### Assess Customer-Centric Manufacturing Platforms

- Will the platform integrate the different teams in the organization?
- Is the platform focused on only solving a current problem or continually evolving?
- Is it scalable and flexible enough to supply the needed speed and accuracy?
- Is it one-size-fits-all, or does it support custom integration?
- Can it cater to both B2B and B2C?
- Is it simple enough to minimize the learning curve?
- Can the solution be implemented in phases or once?
- Can the available budget accommodate this solution?
- What is the implementation success rate?
- Does the implementation require expert assistance?
- And the big one - Is the solution worth the resources?

## Solution: Customer Relationship Management (CRM) Platform with an Omnichannel CX

A customer relationship management (CRM) platform can streamline the sales process, enhance sales pipeline visibility, automate key tasks, and analyze all sales data in one centralized place.

Using a CRM platform can help manufacturers get the full scope of a customer relationship and provide an omnichannel CX experience. By having all siloed data integrated into one source of truth, manufacturers are able to manage, track and organize their relationships with customers.

It also automates key processes that make it easier for manufacturers to see the full depth of user behavior, how long a customer has been with your business, purchase records, and notes on sales interactions, and more.

A CRM platform improves business-customer relationships and can lead to improved customer retention, higher productivity and efficiency, more accurate sales forecasting, and solve complex manufacturing challenges and contributes to overall cost reduction.

“rSTAR is a dedicated group of software engineers who have led the charge at Emerson to challenge legacy designs and processes. Our partnership continues to deliver strong results and I’m proud to be part of the work you do.”

- Bryan Schappell, Emerson Electric

## CRM Built for Manufacturing: Salesforce Manufacturing Cloud

Out of all the available CRM options for manufacturers, we recommend Salesforce Manufacturing Cloud. It best positions manufacturers to have a customer-centric focus with add-ons that are built specifically for the industry.

Salesforce Manufacturing Cloud is the number one digital transformation platform for manufacturers looking to enter the new era of customer experience, relationships, and data visibility.

It is a unique industry-aligned cloud-based CRM platform that helps manufacturers unify sales planning and forecasting, providing transparency across their ERP (Enterprise Resource Planning) and supply chain to foster greater collaboration across their entire ecosystem. By giving deep insights through the latest sales agreements and account-based forecasting solutions, companies gain the ability to better manage their complex sales agreements, advanced forecasting, and improve the end-to-end customer experience.

Salesforce Manufacturing Cloud also has add-ons that give even higher performance and outcomes. Add-ons like Manufacturing Cloud Analytics, Rebate Management, Rebatify (an rSTAR created app available on Salesforce AppExchange), and Community Cloud can take transparency and collaboration to the next level.





## Benefits of Salesforce Manufacturing Cloud

Manufacturing Cloud from Salesforce has revolutionized the manufacturing industry with automation, interconnectivity, machine learning, real-time data analysis, IIoT, advanced computing, chatbots, and AI solutions. However, the industry is still relatively slow to adopt these digital transformation solutions. This *slow adoption rate is often attributed to the complex transformation journey* and uncertainty of these technologies' benefits and results.

Here is how Manufacturing Cloud and add-ons can benefit your business.

## Unify Planned Volume and Revenue

Salesforce Manufacturing Cloud delivers predictability and transparency to businesses when integrated successfully. Its features give a unified view of planned volumes and revenues versus actual orders. With this unified information, it is easier for sales, operations, finance, and product teams to collaborate, adapt to shifts in demand, and build robust predictability across an entire ecosystem.

## Better Visibility Between Operations (Supply Chain), Finance, and Sales Teams

Salesforce Manufacturing Cloud enhances visibility and collaboration between teams, and this helps better operations and reduces latency in the planning process. It provides manufacturers with a 360-degree view of both their customers and orders, providing a window into their manufacturing company in a way that makes it easy to analyze and act on.

## Enterprise Account-Based Forecasting for Better Accuracy and Planning

Integrating Salesforce Manufacturing Cloud helps keep consolidated and updated data that improves overall forecast accuracy. In addition, because it can be customized, brands can easily define a forecast algorithm based on their unique inputs and metrics. The Account-Based Forecasting feature provides insights which allows sales, operations, finance, and product teams to collaborate and respond quickly to shifts in demand and build predictability across their entire ecosystem.

## Increases Partner Participation and Supply Better Transparency

Salesforce Manufacturing Cloud allows manufacturers to extend real-time visibility and collaboration tools to channels, partners, and customers. It also lets manufacturers deliver always-on, self-service digital support to dealers, reps, distributors, and resellers across sales agreements, incentives, forecasts, product issues, and more. The process is transparent and simplified for every stakeholder.

## Relevant OOTB (out of the box) Analytics to Better Analyze, Predict, and Plan

Salesforce Manufacturing Cloud gives access to updated OOTB analytics that'll help improve insights discovery, outcomes analyses, results prediction, and strategic planning. It also provided a unified forecast of run-rate business (managed by Sales Agreements) and new business (managed by Opportunities) to easily build a custom forecast algorithm, surface predicted volume, and revenue metrics that are most relevant for a manufacturer's account teams.





## Better Manage Sales and Sales Infrastructure

Salesforce Manufacturing Cloud supports better management of sales structure through simplified rebate management and effective planning of incentives for partners, distributors, and critical supply chain stakeholders. It also offers sales teams a unique edge by letting them see their accounts' incentive attainment, as well as having the ability to quickly identify cross-sell opportunities. With a holistic view of attainment progress, historical payouts, and account activity all within the CRM, a manufacturer's sales teams will be better equipped than ever before.

## Helps KPIs Setup and Management

With Salesforce Manufacturing Cloud, manufacturers can create and manage the entire lifecycle of a sales agreement within the CRM. Account teams can define start and end dates, frequency for planned orders, and negotiated price and volume commitments across the duration of the relationship, while workflows streamline the stakeholder approval process to ensure there is always one single source of truth.

This helps manufacturers better manage KPIs and track account performance, making it easy for their sales teams to understand, work towards and achieve organizational targets.



## Additional Benefits

Additionally, Salesforce Manufacturing Cloud helps manufacturers to:

- Modernize commercial operations
- Simplify partner engagement
- Transform service experiences
- Facilitate digital transformation
- Leverage embedded analytics
- Consolidate the source of truth for your run-rate business
- Manage rebate
- Capture a holistic view of predicted volumes and demand
- Drive servitization and new service revenue models



OmniMax International is a leading North American building products manufacturer with 26 facilities across the United States and Canada. All their customer data was being stored in OmniMax's on-premises ERP, which created significant accessibility issues, both for account managers working in Salesforce and customers themselves. To grow their accounts and gain a better understanding of their customer behavior, OmniMax contacted rSTAR to help them create a new customer ordering and engagement system.

rSTAR Technologies provided full integration between OmniMax's existing Oracle system and Salesforce to create a single source of truth for customer data. This modernized customer experience completely transformed OmniMax's ability to understand customer data and behavior. In turn, the company was able to personalize the customer experience and provide timely information to customers such as their order status and more.

The result? A customer-centric approach to business that changed how OmniMax approaches sales, marketing, and service. They also boosted customer satisfaction, improved sales productivity, increased office efficiency, and more.

You can read the full case study by downloading it from our website at: [omnimax-customer-engagement-case-study](#)

## Key Considerations: Add-Ons

Although Salesforce Manufacturing Cloud offers many benefits, one out of three integration projects fail, and 43% of CRM users only use less than half the features of their CRM system. As a result, implementing Salesforce Manufacturing Cloud can either be a success story or a costly mistake.

To make your implementation a success story, it is important to understand the basics of the platform as well as add-ons that can enhance service areas of special concern for your company.

### Core Manufacturing Cloud

This part of the product has sales agreement, account forecasting, and target setting. It allows the definition of the required parameters and customer metrics to help inventory management. Consider all stakeholders – customers, sales, and operation – to ensure all needs are met and implementation is successful.

### Partner Community Cloud

This Manufacturing Cloud add-on enables collaboration between partners – sharing sales agreements, opportunities, leads, etc. It empowers collaborators using rebate management to make changes to parameters, submit claims, and view the status of claims. This add-on requires a separate license for those without a community (experience) cloud license.



## Rebate Management

The rebate management add-on allows manufacturers selling through distributor channels to manage incentives to partners, distributors, and customers. It aids the tracking of each purchase or sale against the trade agreement so an accrual can be made and paid/claimed.

Manufacturers can leverage this add-on to automate and use intelligent analytics for rebate programs. It can completely automate the entire rebate management program for your company and enable deep analytics and insight into effective and profitable rebate programs.

## Rebatify

Rebatify is an app that makes Salesforce Rebate Management easier to set up and use.

Rebatify works as an overlay for Salesforce Rebate Management, with wizard-based screens to walk you through the setup and management processes. With Rebatify, manufacturers will be able to enjoy a modern, intuitive, simplified user experience to make managing rebates easier and more efficient.

## OOTB Analytics Based Out of Tableau

Salesforce offers several out-of-the-box (OOTB) analytics with Tableau that give manufacturers insights into essential statistics to help them manage and grow their business.

These features include the ability to see:

- Which accounts are the best performing and which need attention.
- If a customer may not meet with product purchases per the Sales Agreement.
- OOTB analytics that show which products are the best performing and those underperforming.
- If a new product is selling well or not.
- Which rebate program was successful in terms of sales increase for a specific period.



With the recent support of MuleSoft and Einstein GPT, Salesforce and Tableau working together can offer solutions that unlock the potential of every employee so they can deliver business outcomes faster.

MuleSoft allows manufacturers to automate workflows and processes to create incredible digital experiences — all on a single, easy-to-use platform. It allows your company to unlock systems and data with integration that drives productivity and efficiency with automation teams to deliver projects faster and deliver top notch customer experiences.

Einstein GPT is the world's first generative AI for CRM that tailors every customer interaction with AI-generated emails, conversations, offers, and more built on your real-time data. This can boost productivity with insights across sales, service, marketing, and commerce embedded in your flow of work. Einstein also comes with low-code tools to help manufacturers build custom predictions and recommendations without the need of a dedicated data scientist on staff.

Tableau, MuleSoft, and Einstein GPT are Salesforce add-ons that require a separate license.



## Back End System Integration



"It feels like rSTAR is an extension of my IT department. They own the success of our projects as much as I do."

- Elizabeth Rich, IT Director,  
OmniMax International

To use Manufacturing Cloud and its add-ons effectively, it is essential to integrate it with other core back-office systems (ERP, order management system, etc.). For example, Salesforce provides OOTB templates based out of MuleSoft that can help SAP ERP integration. And, a Salesforce Manufacturing Cloud and ERP integration provides rich insights into more areas of a business, enabling better target opportunities, customer insights, and ability to leverage competitive advantages for your business.

## Insights for All-Stars

If you're a manufacturer struggling with manual processes that are affecting pipeline visibility, delaying response times, and creating deeper internal silos, it's time to digitize your sales and operations. rSTAR knows from experience that keeping up with today's changing marketplace is easier with Salesforce Manufacturing Cloud.

At the end of the day, customers want and need good products and great service. Manufacturers who are able to produce good products at reasonable prices yet excel in the service domain will be the ones who pull ahead of others who cannot compete based on service. And, to compete effectively for customer hearts and minds through good service, manufacturers must implement smart technology solutions that put customers at the heart of their transactions.

Salesforce Manufacturing Cloud can provide that and more. It is the number one CRM for manufacturing that equips manufacturers with the tools needed to reinvent their business processes and improve performance. It offers exceptional business planning, forecasting, analytics, and more for manufacturing. Add-ons such as Rebate Management help manufacturers automate complex customer loyalty programs that drive retention rates and profits higher.

To maximize this Salesforce Manufacturing Cloud investment, however, a manufacturer needs the right implementation and integration partner. rSTAR has 53+ Salesforce Certifications, 6+ Manufacturing Accreditations, and has completed 200+ Salesforce projects. We are Salesforce Partners that has teams dedicated to the success of our manufacturing clients. From full implementation and customization of a Manufacturing Cloud solution to automating rebate management through add-ons, rSTAR has the industry expertise and technical acumen to make your project successful.

## **Next Steps: Identify Roadblocks, Set Goals, and Develop a Roadmap for Success with rSTAR**

All right, All-Stars: the next step is up to you.


If you'd like to explore what Salesforce Manufacturing Cloud has to offer, let's schedule a 20-minute Salesforce roadmap call. In this call, our experts will work closely with your team to strategically map out a plan based on your goals – which may include Salesforce implementation and integration. We'll help you decide whether Salesforce Manufacturing Cloud is a good fit and how it can support your move to a customer-centric vision of manufacturing.

[Click here to schedule a Call](#)



## About rSTAR Technologies

rSTAR is a full-service specialized system integrator built to transform leaders in the asset-intensive industries (Manufacturing, Energy and Utilities, and High Tech) into business value all-stars by focusing on digital transformation initiatives.

 [rstartec.com](https://rstartec.com)