

CLIENT SUCCESS STORY

SPT Labtech

Project
Salesforce Best Practice and Business Process Assessment and Platform Re-engineering



Client
SPT Labtech 

Industry
Health Life Sciences – Biotechnology

Location
Hertfordshire

Staff
150

Products
Salesforce Sales Cloud/CPQ

SPT Labtech designs and manufactures robust, reliable, and easy-to-use solutions for liquid handling, sample preparation and management, plus cryo-EM.

The Business Challenge

SPT as a maturing global organisation with an established team looked to ensure that their investment in Salesforce delivers tangible business benefits, scalable operations and supports their organisation throughout its growth.

There had been an incumbent Salesforce partner who had failed to meet expectations in terms of delivery, resulting in a lack of confidence in both the platform and the vendor.

The current implementation of Salesforce lacked in capabilities and as such many hours were lost each day employing manually onerous processes to keep the business running smoothly.

The platform was based on Salesforce classic (not lightning), sales approach disjointed, and in need of harmonisation, business processes ranged in maturity and as such data quality was impacted.

CPQ implementation not completed and as such, the administration overhead considered high, the system lacks robust document generation and numerous manual processes in place to address system shortfalls (productivity loss).

There was no end-to-end visibility of the customer and their associated information, nor any front-end sales tools that integrated with finance.

The Solution

- Assessment of People, Technology and Processes to develop a target operating model that informs the delivery of a technology platform fit for SPT
- Creation of a delivery roadmap to demonstrate to stakeholders what the long-term plan for Salesforce is
- Delivery of key Salesforce changes aligned to an agreed plan
- Delivery of a robust managed service agreement to ensure SPT remain supported

The Results

As a result of Consleague's recommendations, SPT proceeded with the next phase, delivered by Consleague:

- SF Lightning migration
- Migrate all non-standard Salesforce objects into standard Salesforce objects
- Introduce Opportunity teams
- Introduce Chatter
- Collect the required data for the Customer Service Order Form and Salesforce Approvals
- Capture and update the manufacturing status of each order
- Enable synchronisation SiteLine and Salesforce to keep product portfolio's aligned
- Empower Finance to manage the Exchange rates within both Siteline and Salesforce
- Design and implement alternative SF page layouts to ensure pages are efficient and useable
- Enhance user onboarding, training, support
- Scheduling and skills-based routing capabilities
- Detailed review of the CPQ platform
- The organisation fully realised the benefits of using Salesforce and have partnered with Consleague who now support the platform as a managed service.

SF Lightning migration

Introduce Opportunity teams

Introduce Chatter

Detailed review of the CPQ platform