



SUCCESS STORY

Streamlining External Sales in Renewable Energy with Sales Portal



Introduction

A leading company in the renewable energy industry was facing significant **challenges in managing external sales**. With a business model involving multiple agencies and external sales teams, **the lack of unified tools for handling leads, opportunities, and sales orders resulted in inefficiencies, errors, and disorganization**.

To overcome these challenges, the company decided to implement **Sales Portal**, a solution by InterConnecta designed to **optimize and centralize external sales management while seamlessly syncing with Zoho CRM**.



Challenges



Lack of a Centralized System for External Users

External teams lacked access to a robust system for recording and tracking leads, resulting in scattered and duplicated information.



Delays in Converting Leads into Sales

The lack of tools to coordinate follow-up activities made it difficult to progress promptly through the sales cycle.



Lack of Real-Time Visibility

The disconnect between external and internal teams caused delays in data updates, impacting decision-making.



High Licensing Costs

Providing Zoho CRM licenses to all external users became economically unsustainable

Solution



InterConnecta implemented Sales Portal, a platform designed for external users who do not have Zoho CRM licenses. This solution efficiently **manages the entire sales cycle, from lead capture to generating sales orders**. Key features of the portal include:



Controlled access through a personalized URL and specific credentials



Role assignment, such as Agency Admin and Agency User, to manage permissions based on responsibility levels.



Real-time synchronization of all data with Zoho CRM, ensuring consistency and up-to-date information.



Integrated tracking tools to create tasks, schedule meetings, and attach documents directly from the portal.



Direct generation of sales orders that are automatically reflected in Zoho CRM.

Impact and Results

Since the implementation of Sales Portal, the company has achieved significant results:



Increased Operational Efficiency

The centralization of sales activities in the portal has reduced the time spent on administrative tasks, allowing teams to focus on customer relationships.



Continuous Synchronization with Zoho CRM

All external sales data is updated in real time, eliminating discrepancies and improving collaboration between internal and external teams.



Error Reduction

Automation in managing leads, contacts, and sales orders has eliminated manual errors, ensuring consistency in the workflow.



Greater Transparency and Control

Agency Admins have full visibility of their team's activities, while Agency Users can efficiently manage their own records.



Improved Customer Experience

The ability to respond quickly to customer needs, thanks to an optimized workflow, has increased customer satisfaction.

Conclusion

InterConnecta's Sales Portal enabled the renewable energy company to efficiently **manage its external teams and optimize every stage of the sales cycle**. This solution not only provided **autonomy to the teams** but also **significantly reduced operational costs**, improving transparency and accuracy throughout the process.

InterConnecta continues to lead the implementation of innovative solutions like Sales Portal to optimize team performance and processes across various industries.





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