



CASE STUDY

Advanced Dashboard Solutions to streamline the invoicing and sales tracking processes for a prominent leader in industrial automation

Quick Summary

The manufacturing company, which primarily operates in India, also has a significant presence in various international markets across the globe. To manage and implement CRG Solutions, they revolutionized their approach to sales management and financial operations. The dashboard not only improved operational efficiencies but also supported strategic decision-making, leading to sustained financial growth and enhanced employee performance.

About the Customer

The company, an engineering and manufacturing company based in India, specializes in the design, manufacturing, and supply of steam engineering and control instrumentation solutions. The company has a strong presence in the energy and process industries, offering products and services related to steam, energy efficiency, control instrumentation, and industrial automation.

The manufacturing company recognized the need for a more efficient way to manage their invoicing and sales tracking processes.

The company's primary objective was to provide real-time insights into sales performance, invoicing status, and revenue management, thereby improving operational efficiency and financial accuracy.

Problem Statement:

The company, known for its focus on sustainability, innovation, and providing customized solutions to meet the specific needs of different industries, faced several challenges:

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- **Inconsistent Sales Tracking:** Difficulty in tracking daily and weekly sales against targets.
- **Revenue Recognition Problems:** Inefficient invoicing processes cause delays in recognizing revenue.
- **Ineffective Resource Allocation:** A lack of real-time data led to poor resource allocation decision-making.

Solution:

To address these challenges, we designed the invoicing summary dashboard with multiple features:

- **Sales and Target Tracking:** Real-time tracking of sales against daily and weekly targets.
- **Invoicing Status Updates:** To streamline workflows, provide quick updates on urgent, overdue, and due today invoices.
- **Financial Overview:** A comprehensive view of auto and manual picks, as well as clear, short, and overdue amounts to improve financial management.

The dashboard was deployed, resulting in significant improvements:

- **Enhanced Sales Efficiency:** Sales teams were able to monitor their performance in real-time, leading to a 20% increase in meeting sales targets.
- **Improved Financial Accuracy:** Real-time updates on invoicing status reduced revenue recognition errors by 15%.
- **Better Decision-Making:** The dashboard enabled better resource allocation, improving operational efficiency.

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Business Benefits:

Increased Revenue: Improved tracking and management led to a more robust revenue stream.

Enhanced Employee Performance: Employees could self-monitor their performance and adjust strategies accordingly.

Operational Transparency: The dashboard provided a clear view of sales and invoicing status, enhancing transparency across departments.



Strategic Adjustments: Enabled data-driven strategy adjustments for continuous improvement.

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to achieve*

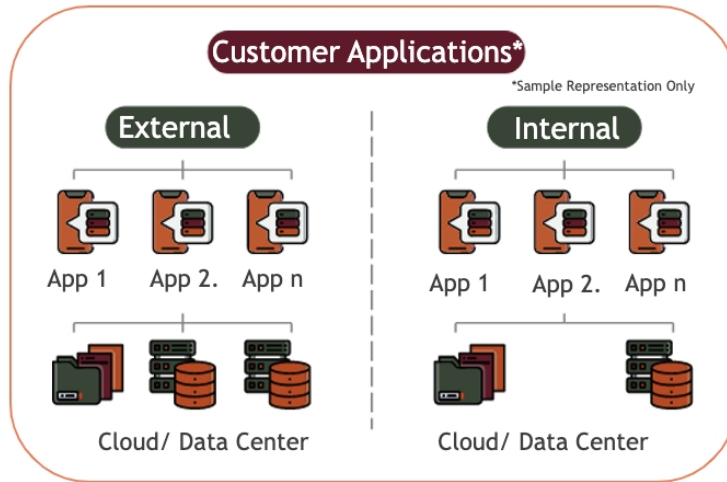
Business Excellence

About CRG solutions

We Cover

Analytics

We setup practices, tools to derive insights (customers, products, apps, teams) to enhance or optimize business effectiveness with the help of products like Tableau, Alteryx, PowerBI, Cloud and MLOPs



RPA

We automate all high volume and mundane tasks to reduce manual errors and to increase efficiency with the help of products like AA (Automation Anywhere), Yellow.ai

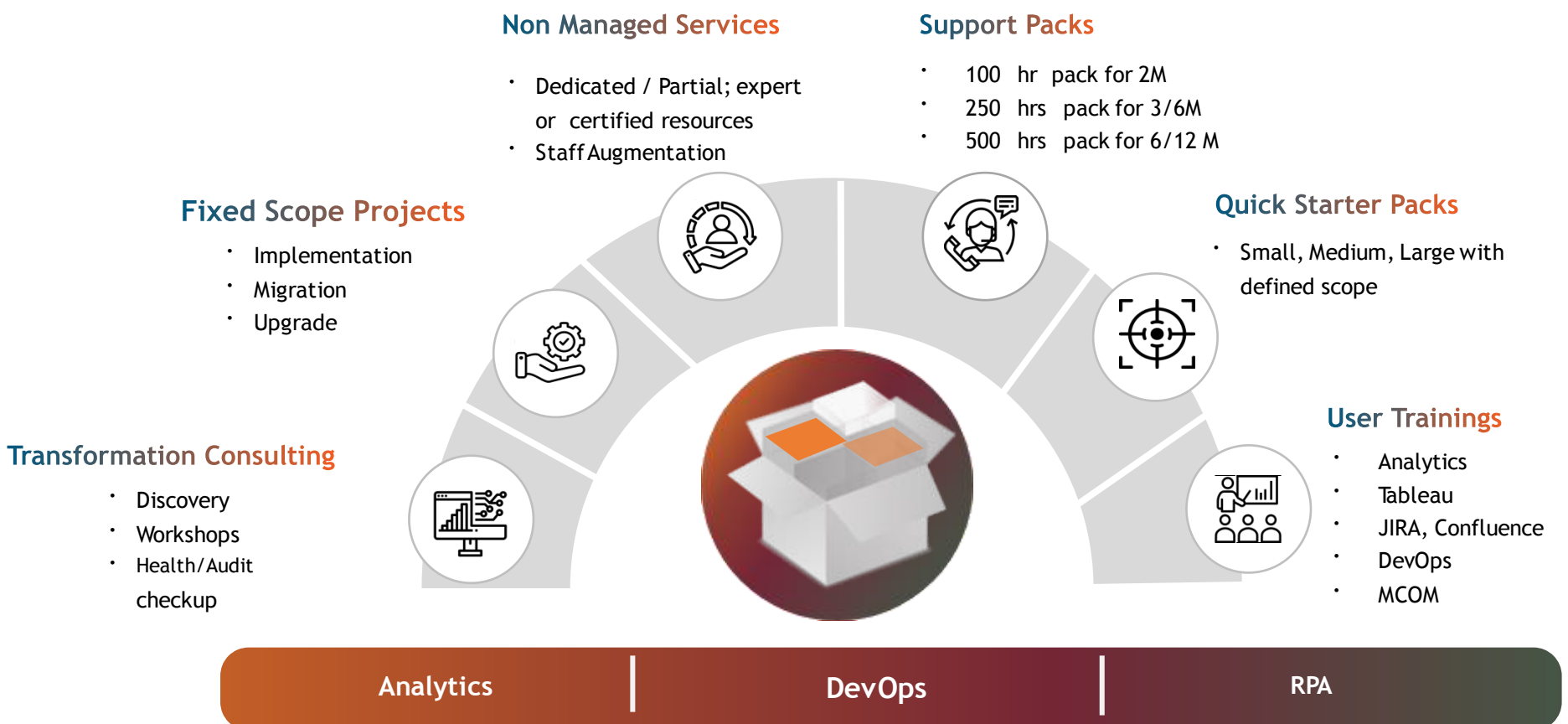


DevOps

We help streamline the application development and maintenance processes with custom project management practices and implementation of world class software tools like JIRA, Azure DevOps, Azure Cloud to improve team productivity



Services Portfolio



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