



**Digitizing sample
management for
manufacturing
industry**

Introduction

Today, manufacturers are exposed to business challenges like never before. Market competition with global sourcing options for the consumer, non-existent product differentiation, rising input costs are putting pressure on the profitability of companies. Innovation and technology are bringing down the product life cycle from years to months. Raising the price by few points would make the consumer look for another product. These all factors are translating into a profit squeeze.

Manufacturers are taking multiple cost control measures to stay cash positive and survive. We see digitization of sample management process as an opportunity to enhance the cost structure.

This eBook defines the problem of manual sample management and its adverse impact on the business. It further explains how this problem can be turned into an opportunity by digitizing the sample management workflow using Salesforce powered solution.



Sample management

Typically, a buyer or distributor asks for a free product sample prior to the bulk purchase. Buyer's product experts, end users, procurement experts will evaluate the product and then specify their requirements for the bulk purchase.

The process of receiving an enquiry for a sample, sample provisioning, receiving a sample feedback, tagging sample to a sales opportunity needs a sophisticated tracking system.

This end-to-end sample journey in any manufacturing unit is called sample management. If not handled properly, inefficient sample management would lead to a cost seepage with a compounding effect.

Missing Samples leads to missed business opportunities

Often, requests for samples come via email or a phone call to an inside sales team. This team is required to inform others who need to be involved. As a next step, this sample request is fulfilled with appropriate internal approvals and finally a sample is dispatched to the customer. Sales team needs to be in the loop while this happens so that they can pursue with the customer for the sample feedback and bulk purchase order.

Due to lack of process automation, system inadequacy, human errors, sample management process breaks down. This results into a wrong sample reaching the customer or not keeping the sales team in the loop would mean there is no follow up with

the customer for the sample feedback. There isn't a single entity responsible for the ownership of end-to-end sample lifecycle journey. This results into a missed business opportunity and also cause a harm to your market reputation.

It's not only lack of system, but too many applications working in silos also create a challenging situation. One application will capture the sample request but if it is not integrated with sample approval and provisioning workflow application, then nobody in the downstream would know that there is a sample request that we need to fulfill. Again, if your sample approval workflow is not integrated with the warehouse, sample dispatch will not happen.

Losing a customer over a mishandled sample request can be avoided by putting in a place an end-to-end sample management system well integrated with incumbent applications

The failure of paper-based or Excel based tracking

Manufacturers of high-end or high-priced products, spend huge amount on creating and sending samples to prospects. The stakes are high. Tracking samples on Excel spreadsheets

can be both inefficient and insufficient to keep a handle on what's gone where, how often samples have gone to the same places, what is the feedback and so on.

In large procurement deals, customer may ask bidders to send samples along with their commercials. There is a high probability that all these bidders will go to the same manufacturer for samples and manufacturer will end up sending samples to all these bidders for the same project. If the manufacturer has no complete view of where, how and to whom samples are going, there is bound to be costly replication of product samples.

Distribution sales challenges

Distribution sales representatives are inundated by communications from prospective clients. Managing so many communications, leads, providing timely service to all, keeping a track of sample management is a mammoth task and there is a high probability that some of the potential customers can slip through the cracks.

Even though relations are built by sales reps, they need to be well supported by the robust pipeline management facility. Digitalizing the relationship management including the sample tracking has become a business necessity.

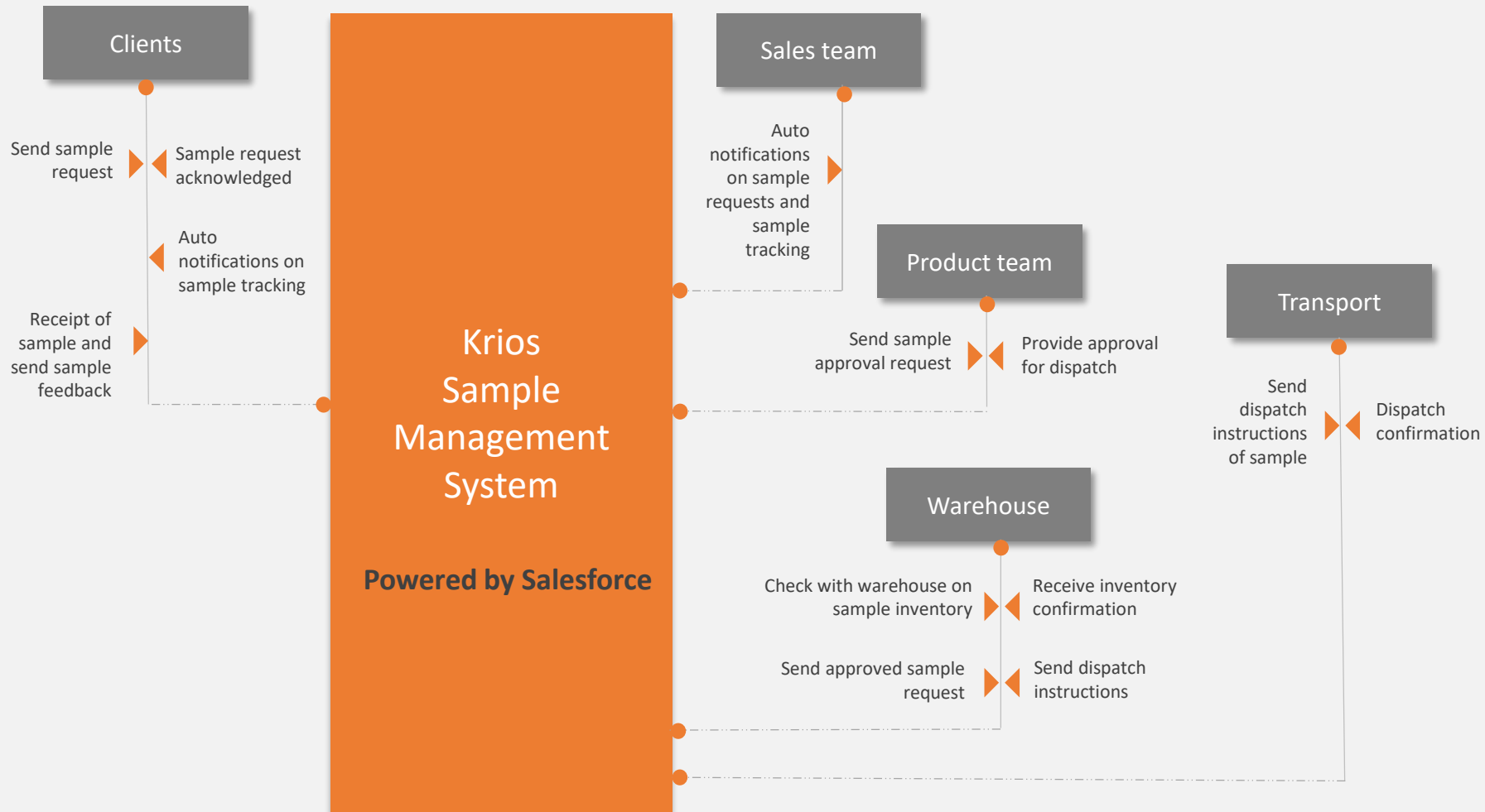
Sample management System (SMS)

Built by Krios – powered by Salesforce

Built on Salesforce - a robust, world leading CRM platform, Krios has developed a Sample Management System (SMS) to address the challenges discussed. SMS provides a 360-degree view of a sample throughout the sample journey. It allows you to efficiently track customer communications and provides you with a clear, real-time, up-to-date view of a customer and make that view available to everyone in the company at the same time.

SMS module	How it helps
Sample workflow	Helps you define the sample lifecycle journey considering all external and internal sample touchpoints
Sample tracking	Helps you with end-to-end tracking of sample. This helps you with business insights on samples requested, dispatched, orders received from that sample and many more
Sample catalogue	Helps you with selection of samples across your product categories
ROI analysis	Gain insights on sample wise, client wise ROI – which samples bring orders, at what price, at what net margin and much more
Sample accountability	Helps you assign owners for sample lifecycle journey and navigate sample workflow for approvals.
Approval process	Design the approval workflow for your company with notification mechanism to bring the process transparency and audit trail
Sample expiry	Maintain details of sample specifications including expiry dates so that samples within expiry dates are dispatched to the client
Sample logistics	Integrate sample workflow with warehouse and transport workflow for end-to-end tracking
Finance and billing	Integrate SMS with finance and invoicing workflows for approvals and billing purpose as required
Analytics and Intelligence	Analyze the data generated to get the dashboards and track the required business parameters
Goods returns	Helps you maintain the record of goods returned by the customers along with notes
Campaign management	Design go to market campaigns – do the market segmentation – identify your client persona based on the insights you receive from SMS

SMS – How does it work?



SMS benefits

SMS brings sample management efficiency by:

- **Gaining better sample visibility:** By using SMS, sales team and client can track the progress of sample request. SMS keeps everyone informed.
- **Efficient prospect management:** Sales person can keep a close track on sample demands from the prospect – how it is fulfilled – gain the customer feedback – and then follow up for the bulk order. The insights gained from SMS are useful to in demand prediction and business planning.
- **Providing stellar customer service:** SMS automates client communication where ever possible. A combination of human intervention and AI assistants provide more personalized service.
- **Eliminating missed opportunities:** With the automated sample management, you can be rest assured that the right sample will reach the customer after appropriate internal approvals and audit trail. The possibility of missing any sample request is nil and hence no business opportunity will be missed due to human errors or negligence.

If you'd like to expand your understanding of how SMS can help your business, contact us today for more information.



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