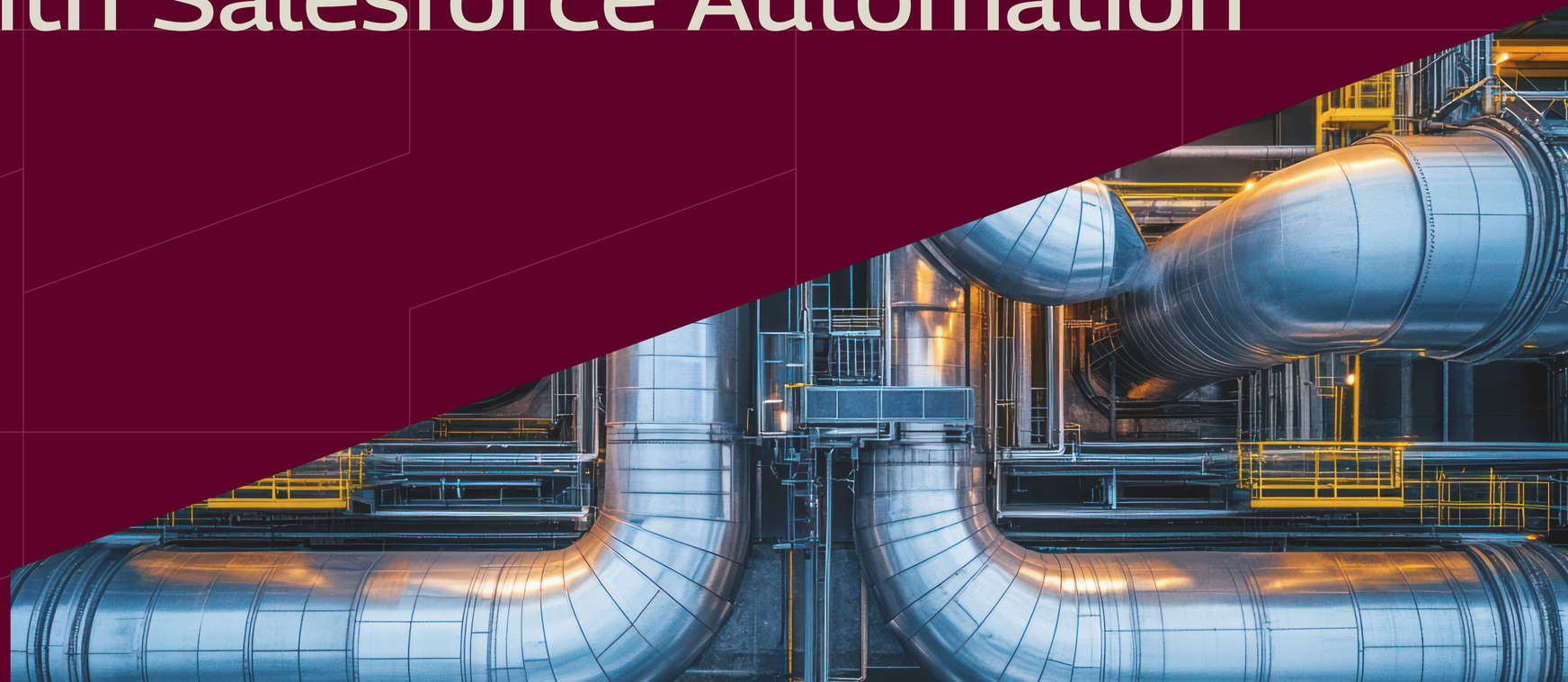
June 2026 Read Time: 5 min.

Case Study

Transforming Energy and Utilities Operations with Salesforce Automation



Overview

A global energy company faced inefficiencies due to fragmented systems, manual processes, and limited visibility across operations. Tech Mahindra transformed its operations by implementing a unified Salesforce platform, enabling centralized field management, automated workflows, and improved sales pipeline visibility. The solution streamlined inspections, enhanced decision-making, and improved operational efficiency through real-time insights and standardized processes across the organization.



Client Background and Challenges

The client is a global, integrated energy company spanning upstream, midstream, and downstream operations. It explores and produces oil and natural gas, and transports, liquefies, and trades hydrocarbons and LNG.

At one of the well-known organizations, numerous business consultants conducted on-site quality checks and documented their insights in multiple physical templates. It was noted that the economies for new opportunities and station renewals were maintained in complex Excel sheets and electronically approved via email. Also, plant turnaround and maintenance were fragmented across multiple systems, leading to operational inefficiencies. Inaccurate margins hindered the sales team's ability to negotiate quotes successfully and secure sales opportunities.



Our Approach and Solution



Tech Mahindra worked closely with the organization to:

- Implement an easy-to-maintain, single platform, quality field management system that enables users to manage, organize, and track station visits and inspection templates.
- Execute the retail pipeline tool that converts all the complex economics templates and assumptions into Salesforce. This easily creates opportunities and sets up approvals.
- Track plant turnaround and maintenance using the Salesforce platform's multiple automated processes.
- Work with a sales management system that provides a complete view of the customer. Thus, becoming a crucial part of customer support, setup strategy, and knowledge.

Business and Community Impact

The solutions enabled the following benefits:



Automation

QFM automated the plan journey for the week, organized the day of BC, and communicated with station managers once the visit was completed. Visits are created based on the BC's existing schedule and the distance between stations.



Quick Delivery

Checklist generation for the whole plant downtime and maintenance journey ensures quality delivery and multiple approval levels to review the data in an organized manner.



Operational Effectiveness

RPT Pipeline enabled a complete view for the APAC management to approve and track each opportunity's economics in a single Salesforce platform.



Real-time Visualization

The sales management system gets the most updated and accurate cost information when negotiating quotes and opportunities.

About Tech Mahindra

Tech Mahindra (NSE: TECHM) offers technology consulting and digital solutions to global enterprises across industries, enabling transformative scale at unparalleled speed. With 149,000+ professionals across 90+ countries helping 1100+ clients, Tech Mahindra provides a full spectrum of services including consult-ing, information technology, enterprise applications, business process services, engineering services, network services, customer experience & design, Al & analytics, and cloud & infrastructure services. It is the first Indian company in the world to have been awarded the Sustainable Markets Initiative's Terra Carta Seal, which recognises global companies that are actively leading the charge to create a climate and nature-positive future. Tech Mahindra is part of the Mahindra Group, founded in 1945, one of the largest and most admired multinational federation of companies. For more information on how TechM can partner with you to meet your Scale at Speed™ imperatives, please visit https://www.techmahindra.com/.

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