



Sales Cloud (Lightning Experience) implementation for gas and energy companies

BACKGROUND

CEZ and Cryogas are two large companies that sell electric energy and gas supplies in Central-Eastern Europe. Both enterprises have been present in the region for over 10 years, growing its structures at high pace without any digital strategy. At some point, using basic tools like Excel and Basic Databases was not enough to support extremely crucial business functions like sales forecasting, usage forecasting and understanding what a customer may want in the near future. On top of that, each team was working independently and holding information about customers to themselves. At some point, both clients, together with TTMS advisors, decided to transform the way their 'business as usual' worked and went digital with Salesforce.

PROBLEM

- Lack of a single, unified vision on how all the crucial processes should be managed
- Lack of a single system broadly available to all employees where all the customer, product and contract data could be stored and managed
- Lack of a single point of access to knowledge (product information, manuals, document templates etc.)
- Lack of a viable reporting and forecasting tool
- Lack of integration with other key business systems
- Lack of information flow between the customers and their partners



SOLUTION

The implementation of the Salesforce Sales Cloud (Lightning Experience) was a pivotal point for both companies. First of all, working with a single system that stores all the important data and is integrated with other key business applications helped to reduce the time spent by Sales and Operational teams on collecting data from different systems. It also allowed to automate quite a few mundane processes that would usually consume a fair portion of time. Both of those things boosted the team's efficiency and allowed them to focus on their customers and increasing sales. To support our team members in the field, we recommended the Salesforce 1 app (with some extension) to provide an instant access to customer data before a meeting and to enable sales people to input any information to the system at any time of day. This ensured a higher transparency and data quality. Next, we implemented a set of analytics to support accurate forecasting. Finally, we used Salesforce as a 'go to' place to get all the important documentation, product offering, and templates. By doing so, we eliminated the need for any other system to hold that function, assuring that all the users have access to the newest versions of documents.

OUTCOME

The most important outcome to both Clients is the transparency and predictability of their business. Today, most of the employees use Salesforce as the primary tool for doing business with their customers. All the crucial information is always in one place, accessible to everyone who may require it. Also, the Salesforce 1 App decreased the time between meeting customers in the field and having that information in the system.