

# Tailored Energy Solutions and Service Offerings for Sales to Large-Scale Industrial Accounts

case study

**B2B sales in the sector for energy supply increasingly require tailored energy solutions and comprehensive energy-supply concepts. That is why Vattenfall Europe Sales GmbH, a member of the Vattenfall Group, uses the project-oriented PiSA sales CRM solution to manage its sales-support activities for large-scale industrial customers throughout Germany.**



Photo: Vattenfall

#### Customer

Vattenfall Europe Sales GmbH

#### Sector

Energy supplier

#### Area of application

Contact management  
Customer acquisition  
Contract management

#### Project data

In operation since 2007  
PiSA sales 4D  
PiSA sales mobile for field staff

#### Integration

Oracle master data base interface  
Integration of MS Office applications  
MS Outlook groupware  
Link to active directory (LDAP)

#### Customer & Sector

Vattenfall Europe Sales GmbH was founded on the back of a merger of the sales divisions for large-scale industrial accounts at Bewag, HEW, and VEAG. It provides individual solutions for electricity and gas supply as well as comprehensive energy-supply concepts for regional and municipal utilities and large-scale industrial enterprises. Vattenfall Europe Sales' offering is directed at the wholesale market and has a twofold basis: the delivery of electricity products and the provision of services for access to the wholesale market. Vattenfall Europe is a core part of the Swedish Vattenfall Group. It produces, distributes, trades in, and sells energy to around six million customers throughout Europe. The Vattenfall Group operates in Germany as well as in many countries of northern and central Europe (among them Finland and Poland). Vattenfall Europe employs a workforce of approx. 20,000.

#### Initial Situation & Challenge

In the period 2004 to 2006, Vattenfall Europe Sales GmbH positioned itself as a provider of retained-value market-access services and insurance products in the field of electricity supply. The company has expanded its range of products and has developed a new customer segment in the area of large-scale industri-

al customers alongside its activities in the traditional field of regional and municipal utilities. To ensure that the high standard of customer-support quality provided by Vattenfall Europe Sales is maintained even on the basis of this expanded customer group, the department managing key accounts required technical and organizational support in the form of the introduction of suitable software. In the first half of 2006, therefore, the company launched its "CRM light" project. The core objectives of this project were:

- + The solution needed to be lean and simple in order to secure employee acceptance.
- + The solution needed to be upwardly compatible in order to allow additional supportive processes to be included at a later date.
- + Customer information contained in the different systems used to date needed to be converged into a central system, most notably in order to avoid the need for extensive data-comparison efforts and to eliminate the error sources associated with them.
- + The system needed to be able to provide an overview of customer history across all processes as well as enabling end-to-end tracking of customer contracts.
- + General information, such as contract-management and quote-follow-up information, needed to be automatically

on-forwarded to up-stream and down-stream process entities in order to be able to do away with time-consuming manual data maintenance using Excel lists.

### Project Course & Solution

The "CRM light" project was launched in January 2007 with the joint preparation of detailed specifications. All the changes which needed to be made to the PiSA sales standard version were discussed and coordinated in a workshop jointly held with Vattenfall Europe Sales. One of the key tasks during this phase was to optimize and harmonize business processes. Close and regular information sharing between the project staff at PiSA sales and the people involved at Vattenfall Europe Sales was an important factor in helping to map out the business processes in PiSA sales, while it would also have an extremely positive impact on the further progress of the project. The detailed description of processes and functions in the specifications enabled an initial prototype to be presented by February 2007. Subsequent to a vigorous phase of testing using more than 100 described cases of application, the system went live in June 2007.

*"PiSA sales hugely accelerates the processes involved in our sales operations for key accounts. This software concept and the consulting provided by PiSA sales have made a convincing case for us."*

Bernd Schmidt, head of IT management and projects

PiSA sales fits seamlessly into the IT landscape at Vattenfall Europe Sales. A bi-directional interface to the master-data base in use at Vattenfall was installed using Oracle stream technology. This interface collects all the data available in the company and provides it to other applications for further utilization. PiSA sales provides key contact, company, product, and contract data for the master-data base. The CRM information recorded in PiSA sales can thus be easily used and processed by other applications – most notably by the workflow-management system used to control handling processes. An interface to LDAP (Lightweight Directory Access Protocol) was also installed to allow the cross checking of the user data at the disposal of central user administration at Vattenfall Europe Sales and the users of the CRM system.

A number of different specialized departments are involved in the pertinent processes. It was therefore necessary to implement a dedicated role concept with different access rights for the execution of business activities in the various process phases and to provide information about the due tasks to the individuals re-

sponsible by means of automatically generated standard activities. The process-definition module contained in the standard version of PiSA sales provided the ideal solution to this challenge.

When the next project phase is completed by the end of the year, the field staff will have the PiSA sales mobile CRM solution at their disposal. This will allow them to access the data stocks they need for their work via a notebook with no direct connection to the central data basis and to record, update, and visualize that data as they do using the enterprise system. The back-synchronization of data thus recorded or modified in the central CRM system enables the central data basis to be kept updated and consistent at all times.

### Results Achieved

PiSA sales provides support for the administration of customer master data as well as for pre-sales, after-sales, contract, and campaign management. The data recorded in the system can be used to provide evaluations for management. In contrast to the non-uniform fashion of work execution subscribed to in former

times, a standardized workflow for all employees now safeguards the consistent quality of customer contracts in all product segments.

The integrated CRM contract-

management module provides information to the employees of Vattenfall Europe Sales about the products and services sold to customers at the mere push of a button. This supports customer-orientation efforts, increases the level of professionalism in the work performed through the constant availability of data, and, most importantly, enables key-account managers to identify potential at an early stage, given that the CRM knowledge base is systematically expanded.

Because CRM processes have been optimized, efficiency has been enhanced by introducing central data maintenance, and a high degree of employee acceptance of the CRM system has been achieved, Vattenfall Europe Sales expects to see a significant reduction in process costs in the coming financial year.

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