

## Case study

# Panasonic Czech Republic sales team goes into action with Salesforce

Just say it like

**Panasonic®**



The Czech branch of one of the market leaders in electronics, Panasonic Czech Republic, supplies a large number of domestic retailers, from large chains to smaller stores. To ensure they have the right stock with the right price, product information and up-to-date stock availability, Panasonic uses a dedicated sales team. Its members travel to stores across the country to promote the Panasonic brand and help increase sales of its products.

## Panasonic's goal was to modernize its reporting system and streamline processes

Each time a dealer visits, Panasonic's sales team verifies a number of important criteria. For example, part of their job is to take pictures of how the merchandise is displayed on the store shelves. All the information gathered was previously stored in an outdated spreadsheet system, which added unnecessary time to preparing reports and spreadsheets for regular management meetings. In addition, the whole system did not facilitate getting the necessary information to the right people at the right time.

Panasonic Czech Republic approached us at the beginning of 2019 with the main goal of upgrading the sales

team's reporting system. Another high priority was to simplify the reporting process and therefore save time. The user-friendliness of the system was also an important factor; as the sales team members rotate quickly, the system had to be easy to understand for new users and as fast as possible to use in practice. Last but not least, the system needed to be accessible via a mobile app – as the sales team members are constantly on the move.

## What was the proposed implementation solution:

- Salesforce Lightning Sales Cloud Enterprise Salesforce Lightning sales platform
- Efficient use of the maximum of existing features
- Customized reporting system
- Creating a mobile app
- Leveraging standard Salesforce components for maximum efficiency
- New objects and their logic

## What was the Salesforce implementation process like?

Our team first spent some time with Panasonic to understand their business needs. We then recommended

Salesforce and developed an architecture that effectively leveraged the existing modules. It was this that allowed us to save significant time and money. The development of the project then focused primarily on preparing effective custom reports for the needs of Panasonic management and creating a mobile app that was intended to be as simple as possible for the end user to understand.

Because we use an agile methodology in our work, we were able to adapt the development to Panasonic's ongoing needs. For example, one of the requirements was that Panasonic managers could continuously create and update itineraries for sales team members. They hoped to gain better insight into key accounts and greater influence over those with fewer sales. Once a sales team member arrives at the store, they can immediately gather the information they need, including taking pictures of the merchandise on the shelves. His job is made easier by a mobile app built on Salesforce. The reports are automatically updated immediately. This enables managers at Panasonic to better understand the context on the ground and make decisions on the way forward based on this.

## How did the employees get to grips with the system and how did it all work out?

Only key Panasonic employees participated in the software handover training. Due to the system's strong user-friendliness, the company was then able to train the sales team internally. The Salesforce-based system proved so successful for Panasonic Czech Republic that it is now being considered for deployment beyond the Czech Republic, in other countries in the Central European region.



## Main benefits:



**Understanding the client's  
business needs and goals**



**Knowledge of existing  
Salesforce modules and ability  
to determine which can be  
effectively used for the client's  
needs**



**Ability to create a functional  
mobile application**

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