



# Implementation of Salesbook platform for renewables company: Edison Energy

Case study



"Green Poland without coal and smog. Thanks to experience and passion, we implement the mission of ensuring energy independence for Polish families and companies"

– Kamil Sankowski, CSO, Edison Energia

1.

## About Edison Energy

Edison Energia is a company dealing with the assembly of photovoltaic installations, heat pumps and solar farms for both individual clients and enterprises. It is one of the largest and fastest growing entities of this type operating on the Polish market.

The company hires over 1,500 employees, including 700 professional installers and about 400 sales people. Until September 2020, Edison Energia has implemented PV installations with a capacity exceeding 17 MW.



**Company**  
Edison Energy

**Sector**  
Renewables

**Country**  
Poland

**Product**  
Salesbook PV

**Result**  
95% sales meeting efficiency



„We knew that CRM alone would be insufficient. We needed something that extends the functions of such a system to cover the whole process, something that empowers the seller and gives above-average experience to our customers

– Kamil Sankowski, CSO, Edison Energia

## 2.

### Challenge

The fast pace of the company's development meant that from the very beginning Edison Energia was focused on supporting processes with the use of modern IT tools. The company wanted to use this approach also in the sales department, the functioning of which is largely based on conducting direct meetings with clients.

During sales meeting, the seller must build the customer's trust by showing its history, achievements and completed projects. It must also be able to explain what photovoltaics is and what benefits can be achieved through it. It is also extremely important to obtain information on the installation site and calculate in real time both the cost of the PV system and future savings. The sales representative must also be able to sign a contract, report the meeting in the system and inform the assembly department about a new client.

“We knew that CRM alone would be insufficient. We needed something that extends the functions of such a system to cover the whole process, something that empowers the seller and gives above-average experience to our potential customers” – Kamil Sankowski, CSO, Edison Energia.

After analyzing the market and the tools available on it, the company decided to implement a sales enablement solution – Salesbook PV.



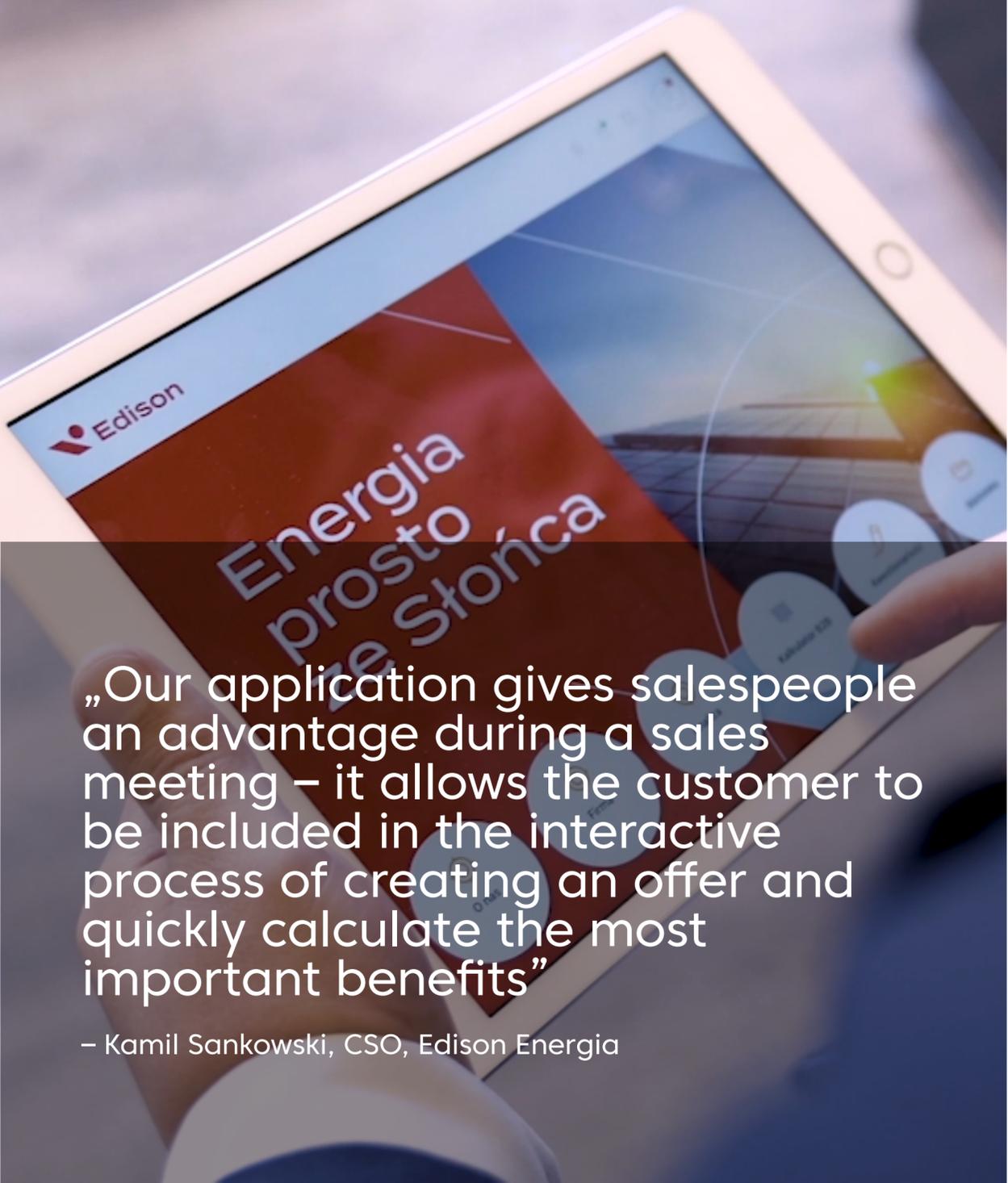
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„Our application gives salespeople an advantage during a sales meeting – it allows the customer to be included in the interactive process of creating an offer and quickly calculate the most important benefits”

– Kamil Sankowski, CSO, Edison Energia

### 3.

## Solution

Salesbook PV is a preconfigured version of Salesbook dedicated for companies selling renewable energy sources (RES).

Salesbook PV covers the entire sales process, including: sales presentation, needs analysis and generation of offers with visualization of photovoltaic panels, signing contracts, sales effectiveness reports for managers, call center module, planning and CRM, financing services, as well as supervision of assembly processes and service.

The application can be used both for face-2-face and remote sales.

The implementation itself could be divided into three main stages. The first one was the upload of all company sales materials to the system as well as the adjustment of the application layout according to the requirements of Edison Energia.

In the next step, the offer calculator needed to be configured to reflect product and pricing strategy and the contract template was uploaded, which the sales man can sign with the client on a tablet or remotely.

Finally, when the application was ready to work, a series of trainings for the sales team and managers took place, allowing for the optimal preparation of the entire team to work with the new tool.



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„With such a dynamic development of the company, tools that automate our activities are a very important element of the strategy. Salesbook not only optimizes our sales, but also allows for quick onboarding of new employees. I think we have shortened the time needed to implement a salesperson by at least 50%”

– Kamil Sankowski, CSO, Edison Energia

4.

## Benefits

The Salesbook PV application is currently used by over 400 salespeople in Edison Energia team who carry out over 8,000 meetings with clients each month.

Thanks to the application and the process embedded in it, which ensures the implementation of certain steps, the percentage of meetings ended with full collection of customer data, submission of the offer or signing a contract has significantly increased. Analytical data show that as many as 95% of meetings end with a complete sales procedure with the client, and only 5% are interrupted or postponed.

Sales managers are also able see how much time salespeople spend with the application and each module. Accurate analytical data translates into better management decisions related to the optimization of current activities.

Salesbook PV also provided the ability to quickly scale the sales department. New sellers get one tool where they have all the necessary materials and tools to be able to complete a successful sales pitch from the first days of their work. After undergoing a relatively quick initial training, they are ready to work with the client.

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