



Sales Force Portal Case Study

> Challenge

To get information to the sales force in the field in a timely manner.

> Solution

A web-based portal.

> Results

The portal provides up-to-date information on products, targets and productivity. Users can access the reports from anywhere at anytime.

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Case Study > Sales Force Portal

Imagine sifting through 700 pages of reports a day just to figure out how your sales representatives are doing out in the field. That's exactly the situation that Swedish Match managers found themselves in. As one of the world's leading manufacturers of tobacco products, they had employees all over the United States selling matches, lighters, cigars, chewing and pipe tobacco with hundreds of brand names. But finding out which products were selling where, and which sales reps were hitting or falling short of their targets, was a tedious process of gathering and sorting through stacks of information.

What's more, it wasn't any easier for the 300 sales reps on the road. Although corporate reports on inventory and pricing were updated daily, sales reps were only sent the latest figures monthly, making them continually dated. All corporate presentations had to be printed and delivered via regular mail. Accessing email wasn't even possible while on the road – to get messages, they had to call in regularly and check their voice mail. It was a hassle, to say the least. And Swedish Match needed a better solution.

Increased Productivity, Rapid Results

The idea of having a product that would streamline all sales processes and provide instant access to updated, customized information was an appealing one. Swedish Match evaluated products from six different companies before deciding on a Viador™ portal. What made the difference? Swedish Match says that Viador's portal had the strongest business intelligence capabilities, was easy to use, and had excellent personalization capabilities. That's important when you have hundreds of employees inputting and accessing all different types of sales information.

The portal was rolled out to Swedish Match's U.S. sales force. Since it's a web-based solution, there was no need for software installation or IT maintenance. And using it proved just as easy. The mobile sales force now had a single point of access to information in Swedish Match's data warehouse. *See Focus>Data Warehousing on the following page.* With a familiar drag and drop interface, they could send and receive the data they needed – instantly.

Everything at a User's Fingertips

When Swedish Match sales representatives go into a store, they now have a hand-held device with Windows® and a built-in modem. They connect to the portal using a third party tool and record and send back information on inventory, sales, pricing, and product displays. They can get up-to-date information about any corporate pricing changes, send and receive email, and slice and dice data to show to



their customers. The best-selling products and brands can be displayed in table or graph form with the push of a button. Sales reps can use this information to point out potential missed opportunities to clients and sell more products to them that are likely to do well in their stores. All the information they need to do their job is at their fingertips.

Driving Up Revenue and Profits

With the portal, sales reps no longer have to wait for a monthly report on their sales numbers – now they can get an instant snapshot of their numbers to date. Being able to continually and immediately see whether they're exceeding or falling short of their target means that sales reps and their managers can make better decisions on a daily basis. Instead of spending hours wading through paper-based reports, managers can view a snap-shot of productivity reports with the click of a mouse. Sales numbers that aren't going according to plan can be automatically displayed in red as a problem area needing to be addressed. Before, a manager had to spend hours gathering relevant information in order to evaluate the performance of a sales rep. Now, the information is instantly accessible in an easy-to-read, highlighted format. Managers and employees can react to problems more quickly, increasing the likelihood of success.

Customized Viewing

Viewing and analyzing trends is an important tool if you want to be a successful salesperson. But sorting through and comparing the data is a time consuming process. Not anymore. With the portal, Swedish Match employees can see the exact data they want in a variety of formats. They can view sales by customer, brand, or product. They can access historical records or look at sales figures by week, month, or year-to-date. When managers log in, they can opt to first see a high level overview of how products are selling in each division. By double clicking, they can go down to the next level, viewing product sales by region. If they see a problem area, they can drill down and get more detail, saving hours in the process.

Continuing to Make Things Easier

The portal is not only giving everyone instant access to vast stores of information, but sorting it and presenting it in a customizable fashion, allowing all Swedish Match employees to make better decisions faster.

Focus > Data Warehousing

CXI developed a data warehouse for SMNA incorporating information from the order entry, HR, and manufacturing systems. Information goes from the data warehouse to the portal for standard reports, OLAP browsing and ad-hoc query tools.

Users access the data warehouse through the portal to get information on daily orders, profitability, competitors and sales expectations. They can browse by product, region, sales representative or time frame.

Sales increased as a result of the information in the data warehouse. The sales force was able to target certain business segments to increase market share. Users benefited from the timeliness of the information and the flexibility of the reporting, including the ability to slice and dice data.