



Booksy solves lead management challenges with Plauti



“Implementing Plauti didn’t just improve things - it streamlined the whole process.”

- Jakub Klimaszewski, Global Salesforce Manager at Booksy



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In this case study, we explore how [Booksy](#), a leading global provider of software solutions for the beauty, wellness, and health industries, tackled significant lead management bottlenecks amid rapid growth. Faced with scalability challenges while using Salesforce for B2B operations, Booksy needed a swift and efficient solution to support its ambitious expansion plans.

By implementing Plauti in March 2021, Booksy streamlined its lead assignment processes, drastically reducing onboarding times and enhancing overall operational efficiency. This study delves into the challenges, solutions, and outcomes of this critical integration.

Booksy faced lead management bottlenecks when leveraging Salesforce for B2B in 2020, they needed a solution fast to meet ambitious plans for expansion.

Background information

Jakub Klimaszewski, Salesforce and CRM Business Owner at Booksy explains their scalability challenges:

“When we first implemented Salesforce in March 2020, there were 70 users, a year later this had increased to 300 users, and right now we have 600+ users in our organization.

We’ve experienced rapid growth. At the beginning of this timeline, when we had a few users - we were using Apex. When the lead came in, it was created as an account, and then an opportunity for our sales team to work on. Afterward, we needed to add custom code to assign the lead based on a number of preset conditions.”

Clearly, the systems and processes at Booksy were evolving quickly and becoming more and more complex. On top of this their rapid growth meant new reps were joining which required the technical team to add them via custom code.

"We rapidly found custom code addition of this type was not scalable. As the team grew, with 50+ joiners every month — lead assignment and other changes, for example, due to someone being off on holiday, were taking considerable resources. This process had become a huge burden. Two weeks would pass after you first requested the change as a sales manager."



Jakub Klimaszewski
Global Salesforce Manager at Booksy

The team's developer was overwhelmed, particularly at the beginning and end of each month, spending up to 50% of his time solely on lead assignments. This situation was deemed "ridiculous" given the rapid growth in leads and ambitious expansion plans. It became evident that the existing system was not scalable, and an alternative solution was necessary.

Summary of requirements

At Booksy, their primary challenge was getting new sales reps onboarded and assigned leads as efficiently as possible. What this really meant is they needed this to be done by the sales managers - not the technical team - to be able to organise their team; adding and removing reps, scaling up and down the number of leads they are assigned, and other simple things like holiday.

Booksy went on to integrate Plauti assignment capabilities in March 2021, saving weeks of development time and manual resources.

Solution

Jakub explained that Plauti "effectively cut onboarding lead times by two weeks." He noted that sales managers went from "having to wait two weeks to assign new people leads, to being able to automatically assign them in two minutes." With the implementation of Plauti, new sales team members could start working on leads immediately after their training. Additionally, sales managers can now easily organize their team, including managing who joins, leaves, and goes on holiday. Before Plauti, "everything needed to go through a centralized global team."

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Some of the Plauti features used by Booksy

- Weighted Distribution
- Geographical and Attribute Segmentation
- Capacity-Based Assignment Capping
- Omni Status Away
- Out of Office
- Working Hours
- Lead, Opportunity & Contact assignment

Booksy used Plauti solution to route and assign Account, Opportunity and Case records.

Jakub mentioned that “it was easy to install and free to test in the sandbox.” They had “a really great experience with Plauti.” Jakub emphasized their satisfaction with the partnership, stating, “We’ve been really happy with this partnership.”

He noted that once they set up Plauti for the first country as a proof of concept, “we never looked back.” As the company grew, increasing the number of people and processes globally, it was never a question of whether to include Plauti, but rather “just how many licenses we needed.”

The implementation of Plauti brought about significant improvements in Booksy’s operations

- Two weeks cut from sales onboarding lead times
- Rapid expansion plans supported
- Sales managers have control of the sales process
- Hundreds of hours of technical development time saved



Plauti

+31.262022015 • info@plauti.com • plauti.com

Jansbuitensingel 6 • 6811AA Arnhem, Netherlands

IDEA São Sebastião, 8th floor • Lisbon, Portugal