



CASE STUDY



Flex Fleet Rental is a leading truck rental company based in Salt Lake City, Utah and offering nationwide service. Flex Fleet provides a range of fast, high-quality transport rentals to meet distribution needs in multiple industries, including construction, mining, oil, and gas. They focus on two key aspects of the customer experience—flexibility and customization—to provide short- and long-term transportation solutions, offering pickups, flatbed, passenger van rentals and more.

THE CHALLENGE:

AN INEFFICIENT SPREADSHEET AND MILLIONS OF DATA POINTS

One of the most logistically challenging aspects of Flex Fleet's model was managing invoices and payments from their many customers. Before partnering with SaltClick, Flex Fleet's solution was to use a single ERP data source to track all ledger entries for the accounting team to access. The collections team also needed access to the sheet in order to follow up with customers who were past due on their payments. They pulled weekly data exports from the primary data source and grouped them by priority—a time-consuming process that left room for human error. These teams were managing millions of individual data points, each categorized by type to prioritize customer outreach and collections moves. Their 15-tab spreadsheet needed an overhaul to improve design and function for easier use.

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purpose.

passion.

partnership.

SALTCLICK

THE SALTCLICK SOLUTION:

SaltClick created a new data organization system to replace the previous spreadsheet, enabling more efficient data entry and sorting, automated messages and aging reports, and greater internal transparency.

First, the SaltClick team established a data pipeline between the single, primary data source and Salesforce, creating a custom object called “ledger entries” that efficiently mapped relevant data across all sources—allowing Flex Fleet’s teams to instantly view data associated with a single customer in an intuitive, actionable format. This step also vastly improved the uptake time for reviewing data: Flex Fleet could refresh data every 15 minutes (as opposed to the previous data input cadence, which occurred once every week).

Second, SaltClick set up a master-detail relationship between each ledger entry record and a respective Salesforce account record—a move that allowed Flex Fleet to broadly contextualize their current relationship with a customer. For example, Flex Fleet can aggregate all customers that are four days past due and initiate an auto-email with their tailored four-day messaging. CN’s solution offers both automated and manual options, allowing Flex Fleet to adjust templates and add personalized messages, which is a helpful and appreciated feature for their most long-standing clients.

Finally, by partnering with vendors, SaltClick was able to implement digital solutions that customized Salesforce, enabling two key abilities: instantly contextualizing information about customers with data from other Flex Fleet sources, and capturing to-do lists for the week in a clearly designed format.

CUSTOMER REPORTED RESULTS:

SaltClick’s solution cuts down on the time and opportunity cost involved in collecting invoices, by allowing employees to reach out to customers on a real-time basis that corresponds to their current status. Along with easier outreach, SaltClick’s solution enables automatic aging reports to be sent to customers—for example, a customer with three past due invoices can instantly see information about the invoice, cost, timing, and deadlines. In addition, one of the most valuable aspects of SaltClick’s solution was the ability to sync data across different teams. For example, a Flex Fleet collections agent can see in real-time which accounts a sales rep is working with, allowing them to create tailored outreach strategies for different accounts, and preventing clients from receiving too many overlapping emails. This 360-degree capability streamlines the invoice collection process. The SaltClick solution also creates customized dashboards that take Flex Fleet beyond Salesforce’s basic capabilities and even allows customers to self-serve information into the dashboard directly. Finally, Flex Fleet appreciated the process of building the solution—including taking input from a range of stakeholders, providing interaction demos and iterating based on feedback.



SaltClick is an award winning IT consulting organization specializing in delivering innovative cloud-based technology Salesforce® solutions to small and medium sized businesses.