

## CASE STUDY

Kross Rental's innovative approach to CRM implementation



### PROJECT ASSUMPTIONS

- **team:** as small as possible
- **implementation:** as smooth as possible
- **training time:** as short as possible starting from scratch

### CHALLENGES

- integrating a complex set of business processes,
- complete the implementation project within a specific time frame

### ABOUT KROSS RENTAL

Kross Rental was created for safety, mobility, and for the healthy and active lifestyle of corporate employees. Kross Rental is a simple and convenient bike rental system.

### THE AIM OF THE PROJECT

The aim of the project was to quickly create a central solution supporting all processes of bike leasing

Sales • Offering • Bike delivery • Servicing • Insurance • Bike repurchase

### BENEFITS

- Kross Rental operates throughout Poland and abroad
- Each week, the Kross Rental team sends out more than 100 complex offers prepared for its customers
- The process of generating an offer document has been shortened from several hours to **several minutes**
- The sales process and order history is available in **one place**
- The list of the equipment released to customers is available in the system together with a **QR code**
- The solution is based on **declarative tools**, which allows **flexibility** in case of deviations from the standard process

### IMPLEMENTATION STAGES

- Adaptation of the system to entering data about customers and products
- Automation of price calculation
- Implementation of Salesforce Community used by customers to complete questionnaires on their preferred equipment
- Creation of a contact form for new customers of Kross Rental placed on the website
- Creation of offer templates and order summary templates
- Gmail integration



**WEEK 3**  
**LEAD**  
**MANAGEMENT**  
**Forms**



**WEEK 5**  
**OFFERING**  
**Soft Go live**



**WEEK 7**  
**SERVICE**  
**Go live**