Chevin Fleet Solutions
Driving Growth With Sales Cloud, Service Cloud and FinancialForce PSA

Company Overview

Chevin Fleet Solutions is the leading global provider of dedicated fleet management software. Established in 1990 in a small town in the heart of the UK, Chevin's software solutions are now used in over 180 countries to manage more than 2-million vehicles and associated assets.

Following a leadership shuffle, Chevin's vision was to increase the number of sales per salesperson by optimising business processes from lead to cash, and using insight to deepen relationships. Chevin team doubled down on Salesforce, selecting The Architech Club's experienced team to implement Sales Cloud, Pardot and FinancialForce PSA (Professional Services Automation).

Company Profile

LOCATION	Derbyshire, UK
EMPLOYEES	80
INDUSTRY	High Tech
SOLUTIONS	Sales, Service, Pardot, FinancialForce PSA
PROJECT DATE	December 2020

Challenge

- Over-complicated, de-centralised systems architecture
- Lack of visibility into Sales activities
- Unreliable data
- Inability to forecast revenue
- Lack of visibility into resource capacity vs demand
- Inaccurate pricing
- Outdated B2B marketing tools
- Questionable sales practices
- Margin leakage in Professional Services
- Customers were not being invoiced on time, or at all

Solution

We commissioned a Solution Architect with PSA expertise, to design and implement

- Sales
  - New and renewal licence deals
  - Services scoping & presales
- Service
  - Case and Entitlement management
- Pardot
  - B2B marketing lists
  - Landing pages and campaigns
- FinancialForce PSA
  - Project management
  - Resource management
  - Costs, revenue & utilisation
  - Billing

Results

- The introduction of Salesforce Customer 360 consolidated four individual systems, creating a single point of reference for the leadership team
- Increased visibility into the true cost of project delivery
  - This led to tighter controls over Professional Services quotes
  - Prompted a review into existing rates
- Improved invoicing practices
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