

# SANTANDER LEASING

## STRENGTHENS MARKET LEADERSHIP POSITION

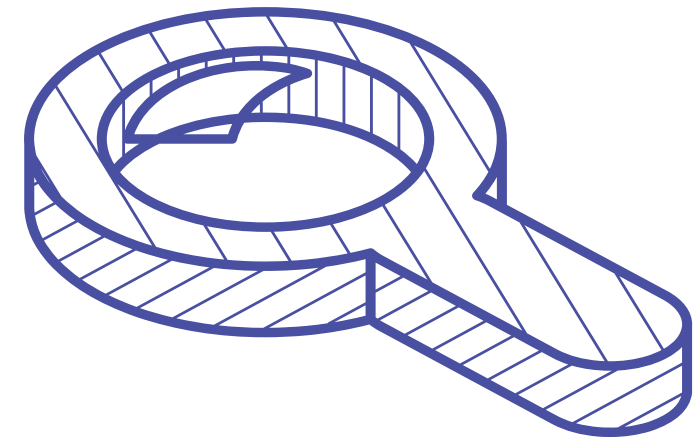
THANKS TO

cloudity 

 salesforce



Santander Leasing is a long-term leader in the financing of machinery and equipment, at the forefront of leasing companies. As a universal lessor, it offers financing for a wide range of fixed assets to clients from the SME and corporate sectors.



## SANTANDER LEASING'S CHALLENGES:

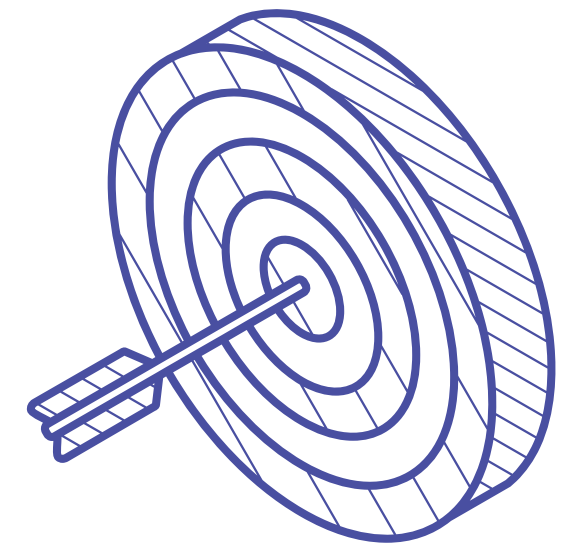
- # scattered data, many spreadsheets, each advisor worked differently;
- # all client information scattered over 9 systems;
- # no substitutability – in the event of an employee leaving the company, the knowledge of the customer served by him was not transferred;
- # limited tools for top management to report the progress of work;





- # no farming process (focusing on existing customers to sustain the growth), the stress was on acquiring new clients;
- # getting information on a particular client took a very long time due to information scattered across various systems and spreadsheets;
- # salespeople used to get an Excel package with customer data to perform calls;
- # field workers did not have access to customer information – they had to memorize or write down all the information obtained during calls.





## PROJECT SCOPE INCLUDED:

- # Implementation of Salesforce Sales Cloud with custom solutions:**
  - campaigns modules,
  - substitution module (to ensure customer service continuity in case of employee absence);
- # Salesforce integration** with 9 different systems used by the customer;
- # Digital Advisory** – strategy, the digital transformation roadmap;
- # construction and orchestration of client campaigns** – actions on clients aimed at increasing the cross-sell level within the current customer base;



- # increasing the **Customer Lifetime Value**
  - # **development of a CRM tool** to organize client processes;
  - # **development of “Farming” processes** to build the advisor's portfolio strategy;
  - # **introducing a tool for reporting and business analysis** related to the current client's retaining processes,
  - # providing a tool that **supports the work of an advisor on the mobile application** (while working in the field) and on the desktop platform,
  - # **Digital Advisory** – strategy, the digital transformation roadmap;
  - # **Salesforce training.**
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## KEY BENEFITS:

- # **360-degree view of customers;**
- # **9 systems have merged into one;**
- # **Santander Leasing now has data for business processes collected in one place – Salesforce;**
- # **account executives' work has become much easier and better organized;**
- # **time optimization – no need to search in various systems for customer information;**
- # **client portfolio – customers are automatically assigned to account executives by region;**



- # **mobile Salesforce app** – account executives use it 50% of their working time, **important data is always at hand**;
- # **the top management has a 360-degree view of advisors**, and insight into the status of work, which they can track and generate reports;
- # **in case of absence of any sort, the custom substitution module in Salesforce** allows changing the employee assigned to a given customer – all performed actions are visible in the system for the employee to see after they return to work;
- # **the custom campaign module reminds salespeople when to call a client, by sending alerts** – no need to search for data in spreadsheets;



**“Clouidity understood our needs perfectly**  
from the beginning, which later translated into the  
implementation time. **The planning was excellent!**  
With such a complex project, there was not even one  
day of delay, which in my experience is extremely rare.  
**Professionalism, professionalism and more**  
**professionalism**, in virtually every aspect of the  
cooperation.”

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**Jakub Porecki**  
Managing Director  
at Santander Leasing