



Case Study

Accelerating Fleet Sales with Salesforce Digitization

GlobalLogic **increased volume of fleet sales** for a large European digitally-led automotive brand **by improving business processes in their Salesforce CRM platform.**

We **removed numerous manual process steps**, allowing agents to use a single system to quote and place fleet orders.

95%

quoting process
shortening

< 15mins

quoting time
reduction

Raising Speed and Accuracy of the Fleet Sales Journey by Digitization of the Fleet Quoting and Ordering

A large European digitally-led automotive brand intended to increase their volume of fleet sales by adding certain business processes to their existing Salesforce CRM platform.

Previously, client's fleet sales process was manual, fragmented between teams and involved multiple systems.

The main restriction of using the standard Salesforce functionality for this purpose was that it has been primarily designed around retail sales.

So, GlobalLogic implemented additional features to the Salesforce CRM system including the capability to quote, approve orders and automatically process fleet orders.

Value created

- Owned the requirements gathering, planning, and delivery of the new fleet sales functionality.
- **Created an end-to-end digital sales process** on Salesforce, allowing agents to quote and place fleet orders directly from one system; removing numerous manual process steps.
- Developed a detailed project roadmap and followed an agile development process with regular standups and releases via robust CI/CD.
- Detailed design documents, test execution results and user guides were delivered for training and business as usual modes.

Impact

- The solution provided ability to record, categorise and track leads, enabled accurate performance and reduced lead leakage during the process of creating automated bulk fleet orders against a single quote.
- **Improved fleet quoting turnaround times** to meet quoting deadlines (less than 4 hours) **from prospective customers reaching reduction of approx 95% (< 15mins)**. Quote accuracy improved due to preconfigured discount and pricing logic.
- From an inconsistent fleet sales process across multiple tools, excel sheets and platforms **helped to switch to a single platform, partially automated, standard, compliant with the client business processes.**