



**LIMITLESS**  
TECHNOLOGIES



Case study

# KROSS RENTAL'S INNOVATIVE APPROACH TO CRM IMPLEMENTATION



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

Project assumptions:

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

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:

- without long commitments
- instalment as an expense
- payment only for the declared rental period
- bikes tailored to users
- new bikes only
- promotion of an active and healthy lifestyle
- an up-to-date employee benefit
- service covered by the instalment (assistance)
- insurance covered by the instalment
- winter parking covered by the instalment
- helps maintain social distance

## Challenge

Implementing an effective system in Kross Rental required an approach that would integrate a complex set of business processes. These include:

- Sales
- Offering
- Bike delivery
- Servicing
- Insurance
- Bike repurchase



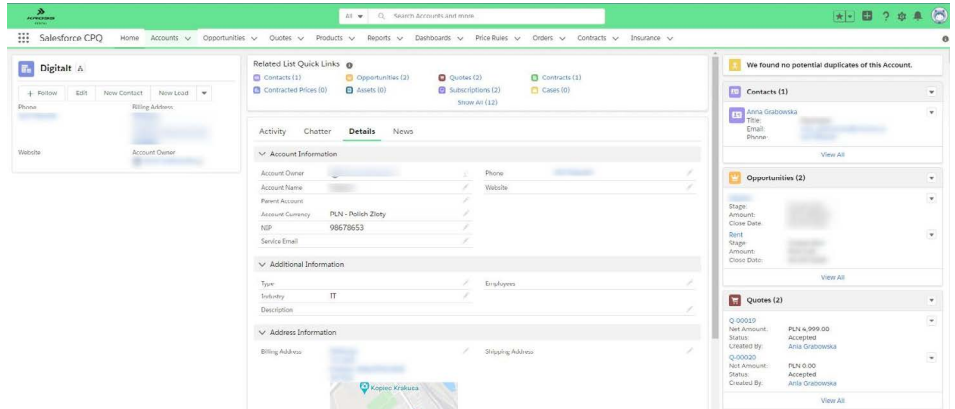
Another challenge was to complete the implementation project within a specific time frame: together with the Client we assumed that the Kross Rental service would be ready for use within 8 weeks.

# Solution

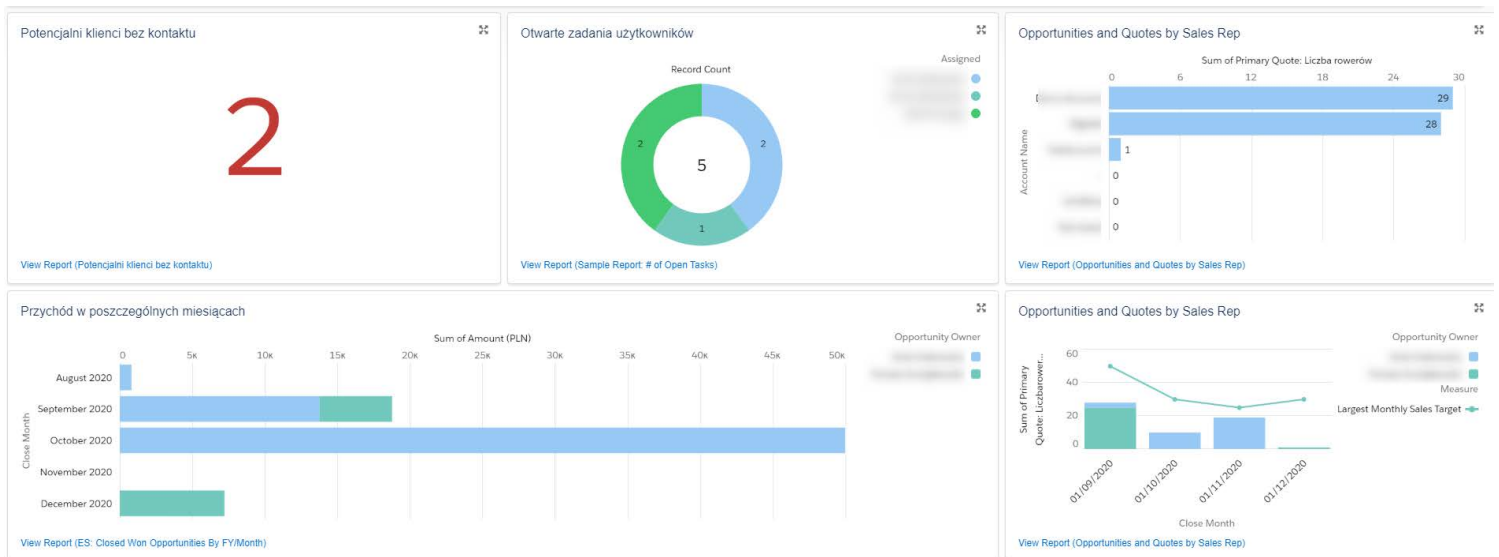
Flexibility and quick implementation of the system were key issues.

The Client chose the following Salesforce solutions:

- Sales Cloud
- CPQ & Billing
- Community



In addition, the "Community" section was added to the solution to improve data collection from customers in the form of a questionnaire.



# Implementation

One of the primary needs signalled by the Kross Rental team was the necessity to track contracts and equipment subject to contracts. During the first week of implementation, we adapted the system in order to enable the sales team to enter data about customers and equipment.

In the following week, we automated the price calculation process. Instead of performing complicated operations in Excel, the sales team could select a product from the base and the system automatically calculates the rental price based on the value of the equipment and a number of other parameters indicated by the team as important in the valuation process. The system would calculate the price for all variants, allowing the sales team to mark which option the customer had decided on and, therefore, which should appear in the order summary.

## 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



Klient:   
Opiekun: A   
Zapozrobowanie: 3   
Lokalizacja: Kraków, MAŁOPOLSKIE   
Czas wynajmu: 12 miesięcy   
Model i rozmiary: mix

ROWERY - WYNAJEM								
Model	Rodzaj	Cena detaliczna brutto PLN	Ilość	Jednostkowa cena wynajmu netto PLN	Wartość rowerów netto PLN	Wartość rowerów brutto PLN	Cena łączna netto PLN	Cena łączna brutto PLN
KR Earth TE M 29 XL cze_bia p			1					
KR Dust 1.0 M 29 L zie_grf p			1					
KR Dust 2.0 M 29 M nie_pom p			1					
			<b>Suma</b>	<b>3.00</b>				

Oferta jest ważna do 04/10/2020

Klient  
Podpis \_\_\_\_\_  
Data \_\_\_\_\_

Sprzedający  
Podpis \_\_\_\_\_  
Data \_\_\_\_\_  
Kross Rental

In order to enhance the process of acquiring new customers who so far had contacted the company mainly by phone, we have created a form placed on the company's website. It communicates with the Salesforce database, registering all requests in the system and reminding the sales team to contact the customer.

At the last stage of implementation, we prepared an offer template and templates for the order summary. This functionality allows the sales team to generate, with just a few clicks, a pdf document with an offer, which they can immediately send by email to the interested customer.

We used Salesforce Community to enhance the selection of equipment in accordance with the specific requirements of the bike user. It allows customers to complete questionnaires automatically linked to a specific company and person (assuming that the user has expressed a desire to rent a bike in the questionnaire).



Ankieta / Survey

1. Imię/First Name\*

2. Nazwisko / Last name\*

3. Nazwa firmy/Company name\*

4. Adres e-mail\*

5. Czy jesteś zainteresowany wynajmem rowerów? / Are you interested in renting the bike?\*

Tak/ Yes  
 Nie/No

6. Ile kilometrów pokonujesz dziennie? / How many kilometers are you making daily?\*

< 5 km  
 6-10 km  
 11-20 km  
 21-30 km  
 > 30 km

7. Jak często chciałbyś jechać rowerem? / How often are you planning to ride a bike?\*

Raz w tygodniu/ Once a week  
 2-3 razy w tygodniu/ 2-3 times in week

”

At ground zero we got a working database to which we can enter customers and bikes and where we can modify the whole process as we go along. For someone who wanted to start a business in days rather than months, Salesforce was the only solution I could think of” said Tomasz Kurzątkowski, President of Kross Rental.

”

**Tomasz Kurzątkowski, President of Kross Rental**



Klient: [redacted]  
 Opiiekun: [redacted]  
 Zapotrzebowanie: 30  
 Miasta i oddziały: Kraków  
 Czas wynajmu: 12 miesięcy  
 Rozmiary: do ustalenia według dostępności

1. DUST 1.0 zielony / grafitowy polysk

CENA DETALICZNA: [redacted]

Do wyboru warianty wyposażenia

PAKET **A** netto/ miesiąc

PAKET **B** netto/ miesiąc



2. DUST 1.0 zielony / grafitowy polysk

CENA DETALICZNA: [redacted]

Do wyboru warianty wyposażenia

PAKET **A** PLN netto/ miesiąc

PAKET **B** PLN netto/ miesiąc



Oferta ważna jest do 19/02/2021

In addition, we have introduced Gmail integration, allowing employees to view communications and events related to a specific customer from the Salesforce level and provides an overview of the negotiation history.

As the part related to sales grew, so did the needs related to equipment servicing. First, we introduced the possibility to link equipment not only to the company with which the contract has been signed, but also to the user who will be responsible for the equipment.

Each purchased product is recorded in the system after the sales team member marks the offer as accepted. The person responsible for releasing the equipment to the customer is then able to tag the actual user in the system. This ensures that the bike user receives regular reminders about the equipment servicing. In the near future, Kross Rental plans to launch an

additional platform for the “Community” section, which will facilitate closer cooperation with business partners (bike repair shops).

## 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

Q-00020 Edit Quote

Add Products Add Events Add Group Delete Lines Quick Save Calculate Cancel Save

Quote Information

Start Date: 1/10/2020 Subscription Term: 12 Expires On: 4/10/2020

Target Customer Amount: Partner Discount: Koszt pieniądza: 106.00%

Quote Record Type: Rent

#	Quote Record Type	PRODUCT NAME	PRODUCT CODE	TYPE	UNIT COST	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
1		KR Earth TE M 29 XL cze_bia p	KRERTE29X21M003395			1.00				
2		KR Dust 1.0 M 29 L zie_gif p	KRDU13Z29X18M000744			1.00				
3		KR Dust 2.0 M 29 M nie_pom p	KRDU22Z29X17M0003385			1.00				

Scaling was done by automating processes, not by hiring new employees



# LIMITLESS TECHNOLOGIES



consulting partner

**VERITAS** partner reseller

## About Limitless Technologies

The strength and main competitive advantage of Limitless Technologies lies in our unique team of experts. We have developed our competencies through years of work at our Salesforce headquarters in San Francisco (USA) and at our European headquarters located in Dublin (Ireland). Years of experience in software development departments – going up the career ladder, from junior programmer to senior manager positions, and managing teams dealing with the development of the Salesforce platform – have provided us with complete knowledge of this system and a deep understanding of the possibilities provided to entrepreneurs by each of the solutions offered.

By establishing Limitless Technologies, we have created a space for entrepreneurs that will enable them to seamlessly step onto the path of digital transformation. We quickly and accurately identify the specifics of a given company, we approach clients' needs individually and believe that properly implemented technology can elevate the management in every company to a new level.

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