Case Study:

**LeasePlan**

Moving the Needle on Sales Performance with SuMo for Salesforce
‘In sales, it’s about making each interaction with the customer count.’

**CUSTOMER PROFILE.**

LeasePlan UK, a member of LeasePlan Corporation NV Group, is part of the largest vehicle management group in the world. The group operates a fleet of more than 1.3 million vehicles and provides innovative leasing and fleet management solutions in 32 countries and across five continents.

The UK division of the company manages a fleet in excess of 136,000 vehicles (including 36,000 commercial vehicles); it operates four brands and employs around 570 members of staff.

**THE INSIDE MAN.**

Tom Brewer, then Head of Commercial Performance, had been with LeasePlan for eight years, holding many Sales and Sales Leadership roles. In a bid to ensure a successful project, Tom was taken out of the business and put in charge of the CRM implementation.
1. The vehicle leasing industry is a mature market that does not exhibit significant growth rates. As a result, it is highly competitive, making sales innovation and customer service key to growth.

2. LeasePlan customers vary from organisations operating vehicle fleets to those offering car schemes and employee benefit programs. Therefore, their “typical buyer” can vary dramatically from traditional Fleet Managers, to HR Directors and CFOs, making it challenging for the marketing teams to get the right message to the right individual.

3. The CRM system in place was out-of-date and unable to adequately support the sales, marketing and customer service teams. Due to its complexity user adoption was poor, data input was weak and the team’s trust in the quality of data held within it was low.

4. The LeasePlan Board and Executive Management team were pushing hard for the rapid delivery of a return on any new CRM investment that would match the Business Case put forward to justify the outlay.

5. The system needed to be rolled out in phases, starting with over 200 busy and on-the-go users in the UK operation with little experience of CRM usage.

6. LeasePlan’s sales culture was not highly competitive. The executive team were seeking a way to turn up the volume on competitiveness.
GOALS.

LeasePlan were seeking to boost sales performance through the successful rollout of a modern CRM system in a large-scale organisation, to rapidly get users accustomed and up to speed with the technology and to keep adoption rates high.

‘We’d ‘been there, seen that’ with other projects and then found that twelve months after the launch, you run out of steam, the benefits haven’t materialised and the whole thing sort of fizzles out.

We were determined, with this particular project, that we weren’t going to fizzle out.

I knew that if the sales team didn’t take to the system, our chances of delivering against the business case were seriously at risk.

Specifically, LeasePlan wanted to:

1. Deliver a fast return-on-investment that matched the benefits case
2. Drive an increase in customer acquisition, retention & sales productivity
3. Grow wallet share with existing customers by offering real expertise and value in each customer interaction
4. Deliver high levels of data quality to support successful client communications and ensure the right marketing message is delivered to the right person at the right time
5. Deliver a high and sustained level of user adoption and engagement
6. Create a more competitive culture within sales teams
7. Transition over 200 busy users seamlessly from an antiquated CRM system to Salesforce CRM with minimal impact to the business
8. Secure a successful roll out in the UK that could act as blueprint for a wider deployment across the rest of their business
Well aware of the frightening Gartner metric that reports that at least half of CRM implementations end in failure, LeasePlan invested not just money but significant time from the management team, ensuring the system had proper executive visibility and support. For this sole purpose, Tom Brewer was appointed to the role of Head of Commercial Performance to ensure a successful rollout.

‘Basically, my job was to move the needle on sales performance by getting the most from our salesforce.com investment’

With a modest background in technology deployment and as a part of his strategy to manage risk, Tom turned to Deloitte for guidance. He had positioned the project as a business change programme, recognising from the outset that it was much more than just a technical software installation. LeasePlan’s underlying goal was to boost sales productivity through the implementation of the Salesforce CRM technology.

LeasePlan didn’t want to take the traditional ‘hard-line’ management approach to adoption as it generated concerns that it would detract from the excitement and anticipation that had built around Salesforce. As a twist on conventional strategies, Deloitte recommended that Tom looked into Gamification as one option to create the desired “surety of user adoption”. CloudApps was introduced to LeasePlan as a holistic solution to coach, monitor and enhance usage of Salesforce through positive user engagement.

SuMo for Salesforce is the performance accelerating platform from CloudApps. 100% native on the force.com, it encourages winning behaviours through data science and game mechanics.
The first step on the road was to clearly identify the goals and targets the business had set itself. The team started with the **SuMo Pulse Board**, a planning process to identify the key behaviours LeasePlan wanted to drive across the different user profiles. LeasePlan’s managing director, Matt Dyer, participated in this process, again demonstrating the level of executive support and commitment to driving a successful outcome.

Once the key behaviours were identified, SuMo was left to run in “Baseline Mode”; invisible to the users, monitoring the current behaviours and activity levels and creating a platform from which LeasePlan could accurately measure progress. Baseline also provided LeasePlan with a safe environment from which to trial out chosen KPIs before going live with users.

After a few weeks in Baseline, LeasePlan had gathered enough data to fine-tune the behavioural achievements and had created a healthy set of insightful data from which to measure progress.

With this in place, SuMo was launched to the team at LeasePlan’s annual sales conference at Mercedes World. The launch was supported by a topical FIFA World Cup themed communications plan, promotional materials and prize give-aways that served to reinforce the purpose of the competition and create an amplified “buzz” around the new CRM implementation.

Following best-practice recommendations, Tom focused on keeping it simple during the first sprint, giving users the chance to become familiar with the concepts of SuMo.

LeasePlan had invested in marketing automation tools to sit alongside their CRM system so one of the first areas of focus was data quality. To this end, and due to the fact that the buyer profile is varied, one of the behaviours promoted by SuMo was “Contact Scouting” which demands the accurate logging of the multiple contact details per customer. Having the right contact details facilitated the delivery of the right marketing message to the right contact, increasing campaign effectiveness and delivering huge value to the sales teams.

Also in the target list was the creation and execution of a strategic account plan for every customer. SuMo not only rewarded users for accurately populating the plans, but also for specific activities taken to
Tom wanted to harness the “power of the team” and structured SuMo to track not just individual success but to also show how the teams collective were performing. Rewards were then available for both individual & team winners.

Chatter collaboration was seen as key to making the disparate sales teams more effective. SuMo rewarded users for offering best practice advice and for sharing materials and strategies that contributed to customer success.

Utilising a native on Force.com solution allowed Tom to weave SuMo into the very fabric of the sales process without it being intrusive, nudging users with best practice actions. Being accessible through Salesforce1 and via Leaseplan’s own mobile client gave Tom the chance to make SuMo available at all times to both his remote and onsite reps.

To bring the competition one step further, SuMo TV was deployed to broadcast leader boards in the office. The intended audience was senior executives and board members rather than the sales teams. This served as a mechanism to bring visibility and awareness to senior management of the evolution of the competition and great progress being made and also served to motivate disparate staff.

As the competition progressed, positive feedback from users started flooding in. It quickly became clear that the use and perception of SuMo was very personal. Some thrived on the competitive aspect of SuMo whilst others enjoyed the “learning” and “guiding” nature of SuMo; as evident in the quotes below:

“SuMo really brought Salesforce to life for me, as a sales person the competition element was hugely motivational to both me and our team. We were determined to win from Day 1!”

Andy Johnston
New Business Account Director

SuMo guided me to new functionality within Salesforce and rewarded the disciplines of good CRM usage - for me Salesforce is now offering real payback in terms of efficiency and productivity.”

Eliot Bernstein
Account Manager
**BENEFITS.**

Tom didn’t originally believe that he had a user engagement problem, however the results show just what can be achieved by deploying behavioural motivation platforms like SuMo.

Here are some of the highlights:

- 583% increase in contact scouting
- 385% increase in overall engagement
- 454% increase in Chatter collaboration
- 153% increase in activity completion
- 843% improvement in team work

**TOP TIPS.**

We asked Tom for his top tips for creating motivational success.

Here is what he told us:

1. Keep it simple. Pick 6-10 behavioural attributes you want to motivate at any one time. Trying to do more than this will confuse users and dilute effectiveness.

2. Recognise the team as well as the individual. Creating team leaderboards alongside individual ones heightens the sense of engagement.

3. Plan ahead, put the work in up-front to make sure the behaviours you choose are properly aligned to your business KPIs and outcomes.

4. Communicate what you are doing, and why, to your users to remove any confusion. If you tell them the outcomes you seek they will help you to get there faster.

5. Take the time to create a solid baseline from which you can measure your progress. At some point you will want to calculate the return on your investment, this will give you the ability to do that.

6. Make it fun. Choose a theme that resonates with your team and align your communication plan and give-aways to it as much as possible.

7. Reward little and often to keep the buzz and excitement going. It doesn’t have to be expensive; the gifts don’t have to be costly as it is more about peer recognition than anything else.

8. Communicate regularly with your users to offer guidance and receive feedback.
GOING FORWARD.

Tom has already rolled out SuMo to LeasePlan Go, a division focused on targeting SMEs with Fleet products through a telesales operation. They’ve chosen to run the competition using “Royal Households” as the theme!

Meanwhile back at LeasePlan UK, Tom is planning to run a second competition focused on opportunity creation and pipeline velocity.