



Increased CRM user adoption, stronger sales performance and improved customer experience.

Customer Profile

Jim Peplinski Leasing is a Canadian vehicle and equipment leasing company with offices in Calgary, Edmonton, Toronto and Ottawa.

Their core business is serving business and commercial vehicle fleets. Jim Peplinski Leasing (JPL) manages assets across the country on behalf of their clients.

With a growing sales team, JPL is poised for continued growth by focusing on the deep relationships with their customers and with their network of vendors and suppliers.

Goals

- Customer Service
- Profitable Growth
- High Rates of Renewal

Industry

Commercial vehicle and equipment leasing and fleet management

Country or Region

Across Canada

Partner

Endeavour Solutions Inc.

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“Our focus on user adoption has played a key role in our CRM upgrade. Training sessions, tips of the week, a user blog, sales contests and top-down management support have all been critical success factors. We are confident that effective use of our Dynamics CRM system will translate into increased customer satisfaction and stronger sales.”

Jamie Barbour, Director, Operations & HR,
Jim Peplinski Leasing Inc.

Business Challenge

Jim Peplinski Leasing Inc. (JPL) was in the market for a new CRM system. Their older version of Microsoft Dynamics did not fully support the evolving needs of their business, or allow them take advantage of several new features available in later versions.

JPL wanted to leverage its software and technology investments in a manner that would better mirror its business processes, better support its sales team and in turn better serve its clients.

JPL considered competing CRM systems, but quickly realized the value and ease of upgrading its CRM to the latest Microsoft Dynamics CRM 2016. With a CRM upgrade in mind, JPL needed a partner, such as Endeavour Solutions who could not only handle the technical aspects, but could also configure the new CRM system and train their users.

Solution

Endeavour Solutions implemented Microsoft Dynamics CRM 2016 within JPL’s data centre and created a custom integration with JPL’s internal Fleet Management system.

As part of the upgrade, Endeavour advised and coached the JPL management team on developing a new set of processes for opportunity and sales pipeline management using Dynamics CRM. With access to role-based dashboards for executive, managers and sales-reps., JPL can now monitor and manage weekly metrics relating to team and individual sales performance.

In addition to the business and technical consulting services provided by Endeavour Solutions, the CRM consulting team created a comprehensive action plan for ongoing change management and end-user training.



One Goal. A Thousand Assists.

- Commercial Vehicle Leasing
- Fleet Consulting
- Personal & Executive Leasing
- Equipment Leasing
- Procurement
- Livery and Ground Transport
- Fuel & Maintenance Card
- Fleet Remarketing
- Wheelchair Accessible Vehicles

Learn more about Jim Peplinski Leasing Inc. @ www.jimpeplinski.ca

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Benefits

The configuration of Microsoft Dynamics CRM 2016 to match the unique Jim Peplinski Leasing Inc. business processes for sales, opportunity management and sales forecasting greatly increased the relevancy and impact of the system on the day to day lives of the sales team and other users.

The mobile interface and ability to automate key processes based on defined triggers helped to save the JPL sales team both time and effort in managing their day to day activities.

With guidance from Endeavour, the management team at JPL adopted a strong top-down approach to change management and training with an ongoing focus on end-user adoption supported by in-class training, quick-tips videos and weekly pipeline and dashboard reviews.

This top-down focus on training has not only succeeded in high levels of user adoption across both senior and junior sales resources – But has also created a common set of metrics, best practices, and a performance-based culture focused on customer satisfaction and sales excellence.

Next Steps

- [Learn more about innovative projects by Endeavour Solutions](#)
- [Connect with Endeavour Solutions for CRM](#)
- [Connect with Endeavour Solutions for Office 365](#)

