


COMPANY

Cartelligent

INDUSTRY

Professional Services

WEBSITE

cartelligent.com

COUNTRY

United States

PROFILE

Founded in 2000, Cartelligent provides an “all-inclusive” approach to buying or leasing a new car in California. Cartelligent’s services include consulting, locating, negotiating, handling trade-ins, delivering and providing after-sale support.

BUSINESS SITUATION

Cartelligent employees manually corrected thousands of service agreements before they could send them to clients. And purchasing agents inefficiently used third-party software to calculate monthly lease payments, extract the data as a PDF and manually upload the PDF as an attachment into Salesforce.

SOLUTION

Cartelligent wanted an app that automated its document creation and narrowed the search to Nintex Drawloop and Conga Composer. Nintex Drawloop’s data merge functionality, and user-friendly and intuitive interface stood out.

BENEFITS


Saves thousands of dollars in annual licensing fees for third-party software



Significant improvement in data integrity and compliance



Increased productivity without having to add headcount

Nintex Drawloop Helps Automotive Company Save Money and Time

Cartelligent increases productivity with the same headcount with Nintex Drawloop’s document generation service.

Cartelligent simplifies the often confusing process of buying or leasing a new car. Between researching and comparing different manufacturers, test-driving multiple models, and negotiating the features, service options and pricing, the average client saves hundreds of thousands of dollars and 20 to 30 hours when buying a new car.

The company’s internal sales process, however, was anything but simple and employees were spending more time than they wanted manually creating documents.

While Cartelligent had been a Salesforce and DocuSign user for more than a decade, the company was limited in its ability to merge data and present the information in a customized and intuitive format.

“It was so easy to get up and going with Nintex Drawloop. Within the first week, we had five document packages live and available to the Sales team. Support was also fantastic, and it quickly became clear that there were opportunities to streamline other sales and service documents.

— David Fidler, Director of Operations, Cartelligent

“Salesforce and DocuSign are great tools that automate some parts of our contract process but we were still required to intervene manually, especially when there was complexity involved,” said David Fidler, Director of Operations for Cartelligent. “We needed control over how contract information was presented, and to eliminate manually correcting our documents.”

CARTELLIGENT DISCOVERS LIMITATIONS WITH CONGA COMPOSER

DocuSign recommended Nintex Drawloop. Cartelligent also investigated competitive solutions on the Salesforce.com AppExchange, including Conga Composer, but Nintex Drawloop’s advantages quickly stood out.

The challenge with Conga Composer was that Cartelligent employees first had to create a Salesforce report in order to merge and feed data into a document. Users were also required to maintain these reports to ensure that they have the most up-to-date data. Nintex Drawloop’s document generation’s merge functionality required no reports and was simply based on a field tagger that automatically feeds data into a document template.

“Nintex Drawloop outshined Conga on so many levels, one being the ability to simply tag fields and then merge data directly into our documents,” David said. “We also appreciated how their user interface seamlessly integrated with Salesforce, streamlining the entire document generation process from start to finish.”

FIVE DOCUMENT PACKAGES WITHIN JUST FIVE WEEKS

The first document that Cartelligent automated with Nintex Drawloop was the initial customer service agreement. The document included data like the make and model of the car, the client contract information, legal terms and conditions, and other contract-required information.

Nintex Drawloop’s merge flexibility meant Cartelligent could redesign its service agreement and present information in a more engaging way. And Nintex Drawloop’s integration with DocuSign allowed seamless delivery to the client for a signature.

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ERROR-FREE DOCUMENTS AND A CONSISTENT BRAND IMAGE

Among those additional document opportunities? Quotes. Prior to Nintex Drawloop, purchasing agents used a third-party program to calculate the monthly payments, licensing fees and sales tax. This tedious process required that agents manually enter the data into both Salesforce and the third-party program. Once the third-party program calculated the payments, the data was exported as a PDF and manually attached to the Salesforce record.

With Nintex Drawloop, Cartelligent automated the entire process within Salesforce. The company uses Excel as a middleware pricing engine, which is automatically pre-populated with Salesforce data. Once the pricing calculations are made, pricing or leasing information automatically feeds back into Salesforce.

“Our Sales team loves how Nintex Drawloop has improved their jobs and that they can generate a document package with literally a click of a button,” David said. “We’ve also been able to eliminate the third-party pricing software, which has saved the company thousands of dollars in licensing costs each year.”

Approximately 90 percent of the company now uses Nintex Drawloop to make their jobs more efficient, from purchasing to sales to office support.

“Document generation has allowed our staff to scale their productivity without adding a single headcount resource,” David said. “We also appreciate the consistent brand image we are presenting to the public and that we are providing error-free documents.”