

The Mission

Set up HubSpot and migrate data and process from Capsule CRM, Zendesk, WIX forms, Click Send (SMS, MailChimp, SensinBlue) and Aryza to HubSpot. Leverage HubSpot's automations to improve workflows.

Key metrics improvements



60k+

Sessions/Month



14.17%

Email CTR



15k+

Connected Calls



WeFlex provides Ride-Hailing/PCO/Uber drivers with 100% Electric Vehicles on flexible Rent-To-Buy & Rental plans.



Mobility



<https://www.weflex.com/>



London, United Kingdom

Scope

Periti began by reviewing current systems and processes and understanding the vision for the future. With a clear picture of the desired work processes, we:

- Migrated sales activities from Capsule CRM to HubSpot, eliminating plug-ins for email and forms and implementing trigger-based tasks
- Migrated Helpdesk from Zendesk to HubSpot Service Hub and set up ticket management workflows, automations and SLAs. We also integrated collections and payments
- Devised data strategy and data mapping and performed dedupe and data cleansing
- Built revenue attribution and other custom reports

HubSpot Hubs

Marketing, Sales, Service and Operations Hub

Systems integrated

Fleetio



WeFlex integrated HubSpot with the Fleetio vehicle fleet management system, synching all drivers, vehicles assignments, as well as service issues.



Aryza

WeFlex's loan management system, Aryza, generates agreements and orchestrates collections.



Aircall

A customer communications and intelligence platform, Aircall provides outbound and inbound telephony services and SMS communications via the Aircall app and automations in Hubspot

Team & Timeline

July 2023 - Oct 2024

Client Team:

- Babrul Miah, Head of Ops Development
- India Cotton, Head of Marketing
- Natasha Morrison, COO
- Stuart Baillie, Operations Director

Periti Team:

- Kelly Fogarty
- Lar Harney
- Sebastian Hartmann



"HubSpot is now a one-stop shop for all departments, streamlining everything from lead management to aftersales support visibility - Exactly what we had set out for"

Impact



Full integration & Automation

From the first inquiry, from sales, to vehicle delivery, service incident and vehicle returns, everything is now orchestrated and automated by HubSpot. WeFlex now has complete visibility on who's driving which vehicle, when the next service is due, or if a driver hasn't paid their bill. All Information is available in real-time and the entire vehicle lifecycle is under full control.



Sales

Leads from all sources now feed into HubSpot. Automations for sequences and workflows ensure prioritisation and tracking of leads. HubSpot replaced multiple systems and software for email, chat, SMS, and CRM, providing a streamlined tech stack and seamless work process.



Service

With HubSpot, WeFlex now has automated communications based on due dates, integrated collections and payments, and automated workflows for ticket assignments as well as SLAs for ticket response and resolution times.



www.peritidigital.com



Munich - Dublin - Lisbon - New York

About Periti Digital

Periti Digital is an Elite Status European HubSpot consultancy with offices in Dublin, Munich, Lisbon and New York. We have delivered complex CRM Projects and Custom Integrations across Europe.

A Full Service Consultancy,