



Know Your Customers: How a Premier US Railway Company Takes Charge with CRM

When CSX Transportation, a leading North American rail-based transportation company, needed a CRM solution, it chose Microsoft Dynamics CRM. Now, more than 1,300 of the company's employees across sales, marketing, and operations use the solution every day. With the solution providing a central repository for both customer and key operational data, CSX has been able to approach new business more strategically as one team, not only driving new revenue, but also providing a consistent, positive experience to their many customers.

Results

- Enable collaboration
- Drive productivity
- Identify new business opportunities
- Improve customer relationships

Industry

Rail-based transportation services

Country or Region

North America

Customer Size

32,000 employees

Number of Current Users

1,300 employees

Connect with CSX



"Through our customer profiles in Microsoft Dynamics CRM, we were able to uncover new business opportunities that we wouldn't have known about otherwise—and we're working on those right now."

Vicki Burton, Director of CRM, CSX Transportation

The year was 1827 when [CSX Transportation](#) began its railroad transportation business—a business that has since grown to more than 32,000 employees, US\$11 billion in annual revenue, and 21,000 miles of railway in 23 states across the United States. Now, the company takes pride in being among the premier providers of rail-based transportation services in North America. And in doing so, it maintains a clear vision to be, as Vicki Burton, Director of CRM for CSX Transportation, puts it: "The safest, most progressive North American railroad, relentless in its pursuit of customer and employee excellence."

In its pursuit of customer excellence, CSX Transportation gradually established various systems and processes to track customer information and facilitate business processes. Over time, however, the company's growing sources and repositories of customer data created a number of challenges. Says Burton, "Our customer information was spread across so many systems that we lacked a complete view into our customer relationships. We were unable to see, for example, the many customer touch points that may have existed across our different business groups. We needed a way to bring all our information together and enable people to collaborate on our accounts in a more strategic and efficient manner so that we could continue to grow our business and provide the level of responsiveness that customers expect from us."

Although Burton understood that CSX could meet these needs by using a customer relationship management (CRM) system, she also understood that, if the company chose the right system, it could address several other challenges as well. "In addition to our CRM initiative, CSX is consistently looking for ways to be more productive, more efficient, and improve business processes internally to make us more agile," she says.



Photo credit: Peter Foley/Bloomberg

Vicki Burton

Director of CRM, CSX Transportation

“Initially, Microsoft Dynamics CRM was viewed as a sales and marketing tool. But as we bring our other teams on board, we are able to collaborate on our customer accounts more effectively and establish a much more comprehensive view of our customers.”

Working for CSX since 1998, Vicki Burton has made a long journey from her days as business analyst for Y2K to the, now, director of CRM. Now working on CRM for three years, Burton notes, “What I like most about it is that we get to work with our end users to deliver a CRM solution that has a real impact on our business, both increasing our revenue and improving our relationships.”

Connect with Vicki Burton



If the company could meet these needs, along with those for a CRM package, such an initiative would be a major win.

Leading the charge into CRM, Burton reviewed a number of leading software packages and ultimately chose [Microsoft Dynamics CRM](#). “We looked at cost, ease of programming, and ease of use, and Microsoft Dynamics CRM was the winner in all those categories,” she says. “We also felt that, because the solution worked through the Microsoft Office interface, it would provide a familiar user experience, especially for our sales and marketing staff who practically live in email, and really help us get the levels of adoption that we needed.”

Establishing the Next Customer Experience: CRM for Sales, Marketing, and Operations

Implementing a new CRM system for a nationwide company is no small task. With this in mind, CSX Transportation, with the help of its local Microsoft partner, took a phased approach to rolling out Microsoft Dynamics CRM. Over the course of six months, the company performed the initial implementation, which included integrating Microsoft Dynamics CRM with SAP Business Objects, Oracle ERP, and several homegrown systems to establish a central repository of customer information. Following early success with Microsoft Dynamics CRM, CSX Transportation has since brought the solution to more than 1,300 employees companywide. Critical to such adoption, Burton notes, “Now, with a tool that works in Microsoft Outlook, the change in our productivity tools has been really easy to sell. With Microsoft Dynamics CRM, you really don’t have to sell change anymore, because people get to work in a tool they are already using.”

Supporting Sales and Marketing

By using Microsoft Dynamics CRM, CSX sales reps manage their customer portfolios on a day-to-day basis and frequently reference the information to ready themselves for sales calls. At the same time, CSX marketing groups focused on specific markets, such as lumber, fertilizer, or steel, can draw on this central source of customer information. From this information, they can identify trends and then relay that information back to sales staff to help devise new strategies for driving new business.

Providing sales staff with the information they need, Microsoft Dynamics CRM also draws on information from several key systems across CSX. These systems include the company’s homegrown pricing system and its enterprise data warehouse based on SAP Business Objects, which includes key information such as how much freight a customer ships and what kind of freight that is.

Extending CRM to Operations and Beyond

While CSX was implementing a CRM solution, it was also undergoing an initiative to transform its local operations service. This required joint participation from trainmasters (operations team members responsible for

CSX Transportation CRM Environment

Platform	<ul style="list-style-type: none"> • Microsoft Windows Server 2008 Enterprise Edition (x64) • Microsoft SQL Server 2008 Enterprise Edition (x64) • Microsoft Exchange Server 2007 • Dell Hardware • Virtualized Components
Data Integration	<ul style="list-style-type: none"> • Scribe ETL • Informatica • Microsoft SQL Server Integration Services
ERP system	Oracle
CRM Software	Microsoft Dynamics CRM
Business database	Microsoft SQL Server for its database in Microsoft Dynamics CRM
Line-of-business systems	Many homegrown systems
Desktop systems	<ul style="list-style-type: none"> • Microsoft Windows 7 • Citrix
Deployment strategy	CSX chose to deploy Microsoft Dynamics CRM on-premises to ease compatibility with its single-sign-on solution.
IT organization	In-house IT team with partner support for specific projects

managing train service) and sales and marketing to profile more than 5,000 customer work sites. Profile information includes the customer's site location in CSX's GIS maps, track infrastructure characteristics, service challenges, operational improvement opportunities, and customers' operational behaviors. This information allows CSX to more effectively manage its sales efforts, better its meet customers' needs, and enhance communications with customers. With these needs in mind, CSX quickly realized it could support many business functions with Microsoft Dynamics CRM.

Says Burton, "Initially, Microsoft Dynamics CRM was viewed as a sales and marketing tool. But as we bring our other teams on board, we are able to collaborate on our customer accounts more effectively and establish a much more comprehensive view of our customers."

Burton is currently working to roll out Microsoft Dynamics CRM to the company's customer service team. Says Burton, "Currently, cases from our customer service team are fed to our sales staff so that they can see if a customer had any issues before getting on a call with them. Once our customer service teams are also on Microsoft Dynamics CRM, they will be able to see the customer's sales information, helping us close the gap between the two departments and provide a better customer experience overall."

The Future of Business, Powered by Insight

Now, with Microsoft Dynamics CRM in place for almost two years, CSX Transportation continues to draw increasing value. Most notably, the company has been able to improve collaboration, drive productivity, identify new business opportunities, and ultimately improve its relations with customers.

Enable Collaboration

With sales, marketing, and operations staff now working in a single tool on the same source of information, they can more effectively collaborate on customer accounts. "Now, for the first time, someone in sales can see in one solution the 'who' and the 'what' involved in the service they have sold," says Burton. "With this insight, they can engage all the way down with the people who operate the trains and those most familiar with the customer to collaborate on accounts."

Continues Burton, "By using Microsoft Dynamics CRM, we can do more team selling and cross-selling across our business groups, such as intermodal transportation, to offer customers the best fit of services."

Drive Productivity

Having a single tool to manage much of their day-to-day work has also meant a boost to productivity for CSX staff. Says Burton, "Before Microsoft Dynamics CRM, people had to go to multiple systems to get the information they needed. Now, they just go to one. That translates into a big productivity savings across the company."

“Before Microsoft Dynamics CRM, people had to go to multiple systems to get the information they needed. Now, they just go to one. That translates into a big productivity savings across the company.”

Vicki Burton, Director of CRM,
CSX Transportation

Identify New Business Opportunities

After centralizing its sales data on Microsoft Dynamics CRM, CSX immediately began to take advantage of the information to find new opportunities. Says Burton, “Through our customer profiles in Microsoft Dynamics CRM, we were able to uncover new business opportunities that we wouldn’t have known about otherwise—and we’re working on those right now.”

Improve Customer Relationships

Before Microsoft Dynamics CRM, customer touch points were not recorded centrally. Because of this, when a customer would call, the people who managed the request would have no insight into the account’s previous activity. Now, all historical customer information is captured. People who address different aspects of the account have visibility into the account as a whole and provide a more informed and personable customer experience.

Illustrative of the value of its customer information, a sales and marketing staff member at CSX recently switched roles into sales and, immediately, he had all the customer information available for his designated sales portfolio. Says Burton, “He was able to pull all the customer information he needed, read about them on his flight to the customer site, and when he met with them, he had an informed conversation rather than just introducing himself as the new sales rep.”

Next Steps

- [Connect with Microsoft Dynamics](#)
- [Become a Dynamic Business](#)
- [Learn about partner solutions available in the Microsoft Dynamics Marketplace](#)

For more information about Microsoft Dynamics, go to:
www.microsoft.com/dynamics

This case study is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS SUMMARY.

Document published June 2012

Microsoft[®]