

Trimac Transportation Implements Building Blocks for the Future with Dynamics 365 Customer Engagement

SPECIFICATIONS

Products

- Dynamics 365 for Customer Engagement
- Salesforce to Dynamics migration
- Engage for Transportation

Major Integration Points

- Dynamics 365 Finance and Operations

Number of Users

- 100+

Currently Deployed

- Calgary, Alberta

Languages

- English

When Trimac Transportation, a bulk transportation and logistics services provider, needed to replace its Salesforce implementation and to automate its contract management cycle, it called upon Hitachi Solutions to get the job done. Keep reading to find out how the Hitachi Solutions team helped Trimac migrate to Microsoft and implement a CRM solution that will enable them to grow for the future.

Introduction

Trimac Transportation provides bulk transportation, logistics, and related transportation services throughout North America. These services include liquid bulk hauling for chemical industries, dry bulk shipments for the construction, mining, and forestry industries, petroleum-based products, and industrial gases.

Trimac's mission is to create shareholder value by safely delivering products and services, creating innovative solutions to meet customers' needs, and achieving acceptable returns by delivering the lowest total cost solutions. Founded in 1945 in Moose Jaw, Saskatchewan, Trimac has achieved industry leadership and become one of the largest bulk carriers in North America.

Challenge

Trimac has many commercial partnerships with other companies, which require a contract outlining the terms and conditions of that partnership. Prior to working with Hitachi Solutions, Trimac's contract management process was primarily paper-based, and the company's legal team processed a significant amount of paperwork manually.

This was a problem for many reasons, including: the manual process was time-consuming and prone to error, and physical contract documents were difficult to manage and access. It was apparent that Trimac needed a centralized, searchable, and secure contract management system — ideally, one that was automated.



Another key challenge for the company was its sales system. Trimac originally used Salesforce as its customer relationship management (CRM) system on the front end, and Microsoft Dynamics 365 (D365) Finance and Operations (F&O) on the back end. These systems were never properly integrated, which made the company's entire lead-to-cash cycle disjointed.

Trimac knew that it had to find a way to either unite these two systems or replace Salesforce entirely, since it was using the solution as little more than a storage system for opportunity details. From a practical perspective, Trimac decided that the best way forward was to migrate from Salesforce to Microsoft, perform a full D365 implementation, and build onto that implementation with modules as needed. The company also hoped that, in doing so, it would be able to standardize and automate its pricing tool, as well.

"What we wanted to do was put in place something that fits with the rest of our applications and gives our users a better experience that integrates with our workflow," said Lawna Hurl, Vice President of Legal at Trimac.

From an industry considerations perspective, Trimac also needed to plan for the future. Prior to this project, Trimac's website was external and passive; the company knew that it needed to move toward a self-service model and required a platform that could support the components of a customer portal. To that end, user experience was a top priority: Trimac boasts a very diverse and physically dispersed user group, so it was important that the company provide its users with a system that was accessible and intuitive to use.

Solution

Given that Trimac was already using D365 F&O on the back end, migrating from Salesforce to Dynamics seemed like the logical next step — especially since the company was impressed by Microsoft's reputation for continuous innovation.

When it came time to choose an implementation partner, Trimac compared different Microsoft partners within the local Canadian market – a search that led the company to Hitachi Solutions Canada. Through conversations with Hitachi Solutions' sales and presales team members, Trimac learned about Hitachi Solutions' transportation IP capabilities and industry experience. Based on these conversations, Trimac decided to partner with Hitachi Solutions to migrate from Salesforce to Dynamics and to implement Microsoft's D365 Customer Engagement (CE) CRM solution.

A Single, End-to-End System

With D365 CE, Trimac can now convert leads into opportunities, share rate cards, convert codes into contacts, have customers sign contracts, and more, all within a consolidated, end-to-end system in a single, end-to-end process. This enables Trimac to closely monitor the entire lead-to-cash cycle, allowing for greater transparency and accountability.



With D365 CE, Trimac is also able to digitize contract management, which makes it easier for the company's legal team to review agreements, receive approval from commercial partners, and monitor the status of each contract. Additionally, D365 CE also automatically generates email renewal notifications 30 to 60 days prior to contract expiry, thereby enabling Trimac customers to automatically renew their contracts. Trimac will also be able to leverage D365 CE's contract management capability to track metrics for customer lifecycle management.

All of these capabilities are seamlessly integrated with D365 F&O, as well as the company's other various systems, providing a robust technology platform that delivers greater visibility and intelligence.

Ready for the Future

Thanks to Hitachi Solutions and Dynamics 365 Customer Engagement, Trimac not only enjoys integrated systems, automated renewals, and a more efficient contract management process — it also has the building blocks for the future. The visibility D365 provides into online orders, shipments, invoices, and more will serve as the foundation for the company's efforts to create a self-service customer portal.

"We worked with a good group of developers and a project manager who was very careful in managing the budget from Hitachi Solutions' side," said Dan Carpenter, Vice President of Business Development at Trimac Transportation.

Said Janet Topic, CIO of Trimac, "Hitachi Solutions cared about our project. I never felt like they were going to run with a blank check and then start coming at us with change requests. I've worked with lots of different third parties to install big products, and I've got to say that of all of them, Hitachi stands out in my mind as one of the best to have worked with."

Contact us to learn how we can help you!

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