



# Transportation Provider Automates Sales Processes to Close More Deals

Sales reps and their managers lacked a systematic way to retain records of customer interactions and manage their pipeline. This directly affected their success and the customer experience. To consolidate key customer information, Saia LTL Freight deployed Microsoft Dynamics CRM, selecting it for its on-premises deployment option and for its tight integration with Microsoft Outlook and other business tools used by the company. With less time spent accessing, managing, and entering information, sales representatives are closing more deals with fewer calls.

## Results

- Fewer calls to close a deal
- Greater sales rep efficiency
- Better competitive position
- Better customer experience

## Industry

Transportation

## Country or Region

United States

## Customer Size

8,000 employees

## Number of Users

More than 200 employees

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*"Microsoft Dynamics CRM helps our reps reduce sales call preparation time by one to two hours per day...this translates into more time in front of customers closing deals."*

Gary Jones, Sales Training Manager, Saia LTL Freight

Saia LTL Freight is a less-than-truckload (LTL) provider of regional, interregional, and guaranteed services covering 34 states. From headquarters in Georgia and a network of 147 terminals, it handles thousands of freight bills daily, maintaining high rates of on-time delivery.

Saia LTL Freight uses an AS/400 system to manage its freight business. Sales representatives accessed the system by visiting one of the company's dedicated terminals or through VPN access. Viewing or updating information for a single customer required the user to navigate to several different areas of the system—a time-consuming task. Preparing for a sales call required several manual steps that culminated in carrying paper reports to the meeting.

The AS/400 system stores basic contact information, but the company lacked a way to capture detailed histories of customer interactions. "Many of our reps used paper and pen, and they were inconsistent in the level of detail they recorded," remarks Gary Jones, Sales Training Manager at Saia LTL Freight. "If an account manager needed to take over from someone who had left the company, the transfer of records wasn't always thorough."

The lack of centralized contact records also put sales managers and executives at a disadvantage because it made reporting and pipeline management difficult and time-consuming. "We wanted to put tools into the hands of our people that would help them succeed and improve customer interactions," states Jones.

## Solution

To simplify access to sales and customer information, Saia LTL Freight deployed Microsoft Dynamics CRM. More than 200 people in the sales organization now take advantage of sales force automation and reporting capabilities. The solution retrieves customer data from the AS/400 system and displays that data in Microsoft Dynamics CRM for easy access. Sales people can interact with the system remotely through Microsoft Outlook on their tablet devices.

CustomerEffective

## Customer Effective

Microsoft Dynamics Gold Certified  
National System Integrator

With its extensive track record of hundreds of Microsoft Dynamics CRM implementations and development projects, Customer Effective was the right fit for Saia LTL Freight.

"Customer Effective has been a very beneficial partner in facilitating the seamless integration of Microsoft Dynamics CRM with our sales, marketing, account profitability analysis, and customer service initiatives," says Sally Buchholz, Vice President of Marketing and Customer Service at Saia, Inc.

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## Benefits

Armed with customer account information anytime and anywhere, sales reps can answer customer queries on the spot, without returning to the office or placing a call to a customer service rep. With less time spent searching for, managing, and entering information, they have more time for selling. In addition, because they can access consolidated shipper information, Saia LTL Freight employees are equipped to improve customer experience and better manage the sales pipeline.

**More immediate access to information.** In the past, if a customer had a specific question that the sales rep could not answer by using the static, printed reports in-hand, the rep would typically have to return to the office to research it by using the AS/400 terminal. "Having access to Microsoft Dynamics CRM during a sales call helps reps answer on the spot, whether it's an inquiry about expected delivery timeframe for a given shipment, accounts receivable, claims, or other items," explains Jones.

**Fewer calls to close a deal, greater sales rep efficiency.** Immediate and easy access to consolidated information helps sales reps close more deals sooner and minimize travel costs. "Microsoft Dynamics CRM helps our entire sales force reduce sales call preparation time by 4,000 hours per month and avoid repeat visits to a customer site to overcome objections," says Jones. "This translates into more time in front of customers closing deals, which is good for reps and good for the company." The ease of use of Microsoft Dynamics CRM also provides advantages. "About 40 sales calls a week is the norm, so our sales force loves the fact that Microsoft Dynamics CRM lets them live and work in Microsoft Outlook," Jones elaborates.

**Better competitive position.** Jones believes that deploying Microsoft Dynamics CRM has moved Saia LTL Freight ahead of competitors, putting it on more solid competitive footing. "Technology-wise, Microsoft Dynamics CRM has helped us move from the middle of the pack to a leader position, and we can more effectively recruit and retain sales people because of CRM," he says.

**Better customer experience.** Sales rep access to historical customer interactions improves customer perception, experience, and retention rates. Jones explains, "Account transitions from one sales rep to another are now much smoother, and the ability to authoritatively answer customer questions using Microsoft Dynamics CRM helps raise the reps'—and the company's—professional image."

## Next Steps

- [Read about Microsoft Dynamics CRM solutions for sales success](#)
- [Connect with Microsoft Dynamics](#)
- [Read about other ways Microsoft Dynamics CRM can help give your sales teams the insight they need to be effective](#)

For more information about Microsoft Dynamics, go to: [www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

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