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U.S. Xpress

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 **Hitachi Solutions**



Dynamics CRM Customer Story

Leading trucking company eliminates \$350,000 in lost-opportunity costs

CUSTOMER PROFILE

U.S. Xpress

INDUSTRY

Transportation

LOCATION

United States

ABSTRACT

When leading truckload transportation company U.S. Xpress set out to modernize their IT infrastructure, they needed a CRM system that could deliver a single view of customer information across all their divisions and affiliates. Microsoft Dynamics CRM and Hitachi Solutions gave them a single place to access customer information, prepare quotes, and collaborate on the bidding process, and saved them up to \$350,000 in lost-opportunity costs.

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CHALLENGE

U.S. Xpress is one of the largest for-hire common carriers in the United States with over \$1.7 billion US in revenue. The company manages a portfolio of transportation services and regional affiliate companies across North America. As the company grew and diversified their service offerings, it was apparent that their legacy CRM system was not able to provide the functionality and flexibility the organization needed. Their existing CRM solution wasn't sufficient for the company's needs any more.

As Bob Poulos, Vice President of Sales and Marketing for U.S. Xpress says, "Our legacy system was 13 years old and so heavily customized that we were tied to our vendor for support and unable to upgrade the solution. In addition, it had no connectivity to any of our data, and to establish that connectivity would have been a massive undertaking."

The need for end-to-end functionality

U.S. Xpress leadership knew they wanted a CRM solution that went beyond simple data access to give people tools to support end-to-end business processes, from strategic account planning and bidding for new accounts to sales, rating, billing, and operations. Armed with that kind of deep data insight, the company could take a much more holistic approach to how they bid and closed new business. According to Todd Davis, Director of Sales and Marketing for U.S. Xpress, providing business insight and facilitating end-to-end business processes was crucial.

"The highly fragmented trucking industry has very low closure rates; each year, we price around \$75 billion in freight and close about \$1.7 billion of that," he says. "Being able to both better understand our customers and automate the entire sales process can have an enormous impact."

Collaborative sales



“For our salespeople, in particular, the fact that Microsoft Dynamics CRM worked through Microsoft Outlook made it a great fit and helped us adopt it with greater ease. It also fit with our existing Microsoft infrastructure, and we felt that we could avoid having to heavily customize it to meet our needs.”

Bob Poulous, Vice President
of Sales and Marketing, U.S.
Xpress

Deals in the transportation business can be big and complex, with long sales cycles and a huge amount of data to sift through in order to land the right business mix from a bid. From the beginning, this meant headaches for the sales force. Different U.S. Xpress affiliates were often bidding on the same business, making it difficult to coordinate bids. Customer meetings required a huge amount of preparation in order to sell through the bid and convey U.S. Xpress' value proposition. By having multiple divisions and affiliates, the company leadership knew there were opportunities for synergy between sales teams, but lack of visibility into customer data made it hard to make it work. There wasn't very good visibility into the sales pipeline either, which made it hard for the company to focus their sales efforts.

That wasn't all. Sales representatives were spending countless hours assembling data and reports from multiple departments around the company. And as Poulos notes, this resulted in “tens of thousands of dollars in lost opportunities per salesperson per year, because salespeople spent time finding information rather than selling.”

SOLUTION

U.S. Xpress considered several CRM solutions, but eventually settled on a Microsoft Dynamics CRM implementation customized by Hitachi Solutions to meet their business needs. The combination of powerful sales force automation, deep data access and reporting, and ease of use were winners for U.S. Xpress. “For our salespeople, in particular, the fact that Microsoft Dynamics CRM worked through Microsoft Outlook made it a great fit and helped us adopt it with greater ease,” says Poulos. “It also fit with our existing Microsoft infrastructure, and we felt that we could avoid having to heavily customize it to meet our needs.”

Business intelligence

One of the strengths of their CRM solution is the ability for end users to draw upon all the customer operational data stored in their data warehouse, leveraging it to drive better performance and decision making. In such a competitive business, having the right information on hand can make all the difference in winning a profitable deal. Says Poulos: “Where



“With Microsoft Dynamics CRM, when we have multiple divisions contacting the customer on different timescales, for different types of contracts or services, we’re able to ensure our sales force speaks with one voice.”

Todd Davis, Director of Sales and Marketing, U.S. Xpress

Microsoft Dynamics CRM really beat the competition was when it came to providing business intelligence to the people across our company. Our people could create the dashboards and reports they needed to really take charge of their own destiny and do so with little to no involvement from the IT department.”

Sales Force Automation

All of the company’s financial and logistical data is stored in their AS/400 logistical data is stored in their AS/400 ERP system. With tight integration between this system and CRM, the company has been able to give the sales team streamlined processes for pricing, quoting, and responding to customer RFP’s. When a new prospect is identified the sales team immediately captures it in CRM and an associated billing record is created in the ERP system. Tasks associated with preparing quotes are automatically routed by workflow so that the sales team can deliver accurate quotes quickly. When a sale is made, the customer and account records are automatically updated in the ERP and CRM systems.

Says Poulos, “When sales staff are out in the field with customers, they can quickly route request for quotes back to our pricing team. A manager can then view a queue of all incoming requests and distribute those out to our pricing analysts, based on a range of criteria such as the value of the deal or even an analyst’s workload.”

BENEFITS

Today, with CRM providing a single view of customer information along with automated workflows for core business processes, U.S. Xpress is able to run more efficiently and be more effective at what they do. Just the reduced prep time for sales calls saves the company as much as \$350,000 a year in lost-opportunity costs. Improved sales productivity and reduced IT support costs amount to tens of thousands of dollars more in annual savings, and improved closure rates on new business opportunities help make U.S. Xpress a stronger, more competitive company.





And with the new CRM upgrade, U.S. Xpress has extended CRM to more teams and business units across the company, including their newer brokerage division. This means that their divisions can work together to offer the customer a compelling mix of services including dedicated contract carriage, irregular route one-way services, and on-demand brokered services. Armed with a complete view of their history with each customer, the sales team is better able to coordinate their communications and work with the customer in a way that's clear and consistent. Says Todd Davis, "When we have multiple divisions contacting the customer on different timescales, for different types of contracts or services, we're able to ensure our sales force speaks with one voice."

Meeting the customer's needs

Along with the upgrade, U.S. Xpress also implemented a comprehensive bid management solution to help their divisions deliver better quotes, faster. With better access to information and collaborative tools, their teams are able to work together with the customer to come up with a bid response that fits everyone's needs. With the ability to store, process, and access huge amounts of customer and account information, U.S. Xpress is able to find new and innovative ways to address their customers' needs for transport using the resources they have available. And with unified data across business divisions, there's no danger of affiliates cross-bidding with the same customer and hurting the business.

Recovering lost-opportunity costs

Before Microsoft Dynamics CRM, salespeople spent as many as seven hours preparing for a meeting with a customer to gather all related account information. Now, that information is a report that only takes up to 90 seconds to run. Says Davis: "Over the course of the year, each salesperson was applying around \$10,000 worth of their time gathering customer information. Now, with Microsoft Dynamics CRM, we have that time back, know our customers even better than before, and can reapply the lost-opportunity costs of around \$350,000 to reaching out to new prospects."



Improved closure rates

With a comprehensive view into both its sales pipeline and its customers, and empowered with tools it needs to manage them, U.S. Xpress can more strategically target its customers with competitive pricing and specific offers to help close more deals. Says Davis, “By using Microsoft Dynamics CRM, we have improved management of sales representatives’ activities, improved their productivity, can perform strategic account planning and bid management more effectively, and can more easily provide enhanced reporting — all of which have helped us improve our closure rates.”

Enhanced business insight and customer service

Because Microsoft Dynamics CRM works together with the company’s AS/400 ERP system, staff now have a single view into a customer. With all information in one system, U.S. Xpress has been able to give managers unprecedented insight into the business. “With Microsoft Dynamics CRM, we’re now able to have that executive-level conversation,” says Poulos. “We can go through our pipeline and see what sales calls we have made, what calls are in the pipeline, and then drill down into those activities and see what our estimated wallet share is with that customer and who we are competing with.”

The benefits received from the insight into customer and account information that Microsoft Dynamics CRM provides spans departments and teams within U.S. Xpress.

Says Davis, “Now, with one source for company information, our management and support teams can operate as one, improving our execution and responsiveness to our customer needs and improving those relationships overall.”

