

# Capital Transport drives sales, delivers better service and achieves real-time data analysis with Microsoft.

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*Brett Arthur, National Sales Manager, Capital Transport*

Capital Transport is a national transport and logistics company with a fleet of over 1,000 vehicles. The company delivers goods by motorbike, van and heavy vehicle, safely and on time, to homes and businesses around Australia. The company also provides warehousing and distribution services.

Capital Transport’s sales processes were based on an ageing customer relationship management (CRM) system that did not provide sufficient visibility of customer histories, and did not allow staff across different state offices to access the same information. This caused confusion about customer accounts, and led staff to provide an inconsistent service between locations. In addition, Capital Transport’s data analysis and reporting were based on information supplied by staff members, rather than real-time data and actual sales activity.

To improve its sales processes and data analysis capabilities, Capital Transport implemented a new customer management system based on Microsoft Dynamics CRM. This system has helped the company increase sales, and provide a better, more consistent service to customers. The company also plans to deploy Microsoft SharePoint Server for document management and its intranet in early 2012.



## Capital Transport

**Industry:**  
Transport and logistics

**Location:**  
Australia

**Organisation size:**  
250 employees and  
1,000 subcontractors

### Organisation Profile

Capital Transport is a national transport and logistics company with a fleet of over 1,000 vehicles. It delivers goods to homes and businesses across Australia and provides warehousing and distribution services. The company employs around 250 staff members who work from offices in Adelaide, Brisbane, Melbourne, Perth and Sydney.

### Business Situation

Capital Transport needed a comprehensive, flexible CRM system to manage its sales process and provide sales data reporting and analysis capabilities. It required a system that staff across all states could access, to unite the national sales team, establish a set of best practices and provide a more consistent service to customers.

### Solution

Capital Transport deployed a new system for managing its sales process based on Microsoft Dynamics CRM. This system allows sales teams across five offices to record and stay up to date with the company’s client interactions, helping to deliver consistent service. It also provides real-time analysis of sales activities, based on accurate data.

### Benefits

- Unified sales process across multiple locations
- 100 percent adoption due to ease of use
- Accurate, real-time data analysis
- Consistent customer service
- Flexibility to support business growth



“We needed to improve connectivity between our offices with a CRM system that brought together all facets of our business and all sales activities from across the country.”

*Brett Arthur, National Sales Manager, Capital Transport*

## Business Needs

Capital Transport provides transport and logistics services, including on-demand local transport, permanent contracting and home deliveries, to customers across Australia. Its clients range from small businesses to large, national companies.

The company has grown significantly since 2009, and now has almost 250 employees and around 1,000 subcontractors nationally.

Capital Transport has a sales team of around 50 people, located in offices in Adelaide, Brisbane, Melbourne, Perth and Sydney. However, this group lacked a comprehensive customer management system to manage its sales process and activities, such as phone calls and emails to customers. Its existing system was a combination of an ageing CRM application and Microsoft Excel spreadsheets.

“It got to the point where different states were using different systems, and salespeople were using their own processes to generate leads, monitor opportunities and manage accounts,” says Brett Arthur, National Sales Manager, Capital Transport.

The sales team often experienced crossover and confusion about who was working on what account and at what stage prospects were in the sales pipeline. This led to internal human resources issues and meant that sales staff sometimes provided inconsistent service to customers.

“In some cases, different staff members from different offices were calling the one client, which looked unprofessional,” says Arthur. “This inconsistent approach was not in line with how we wanted to run our business.

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with a CRM system that brought together all facets of our business and all sales activities from across the country.”

Using several different systems – some of which were manual – to record sales activity meant the company’s data reporting and analysis capabilities were limited.

“We relied on information that staff provided, rather than data automatically retrieved from a CRM system,” says Arthur. “We wanted to more accurately analyse sales activities, in order to identify and act on trends, improve our processes and increase sales.”

Another major issue for Capital Transport was ensuring its long-term client relationships weren’t being hindered by short-term transactions.

“For example, we had some salespeople trying to do a deal with a customer on the spot in one state, and a national salesperson in another state trying to establish and build a relationship with an entire branch of the business,” says Arthur. “Again, we were experiencing a lot of crossover and we needed to get everyone on the same page.

“We wanted a CRM system that was relevant to our requirements as a transport and logistics business, and that was flexible so we could customise and build on it to suit our needs. In particular, we wanted to develop quantitative methods for measuring our client relationships.

“It was also very important that our CRM system integrated easily with Microsoft Outlook, as we base our sales activities around this application.”

## Solution

In November 2010, Capital Transport appointed JayThom, a Microsoft Gold Certified Partner for

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Customer Relationship Management, to implement a new CRM system based on Microsoft Dynamics CRM. By the first week of March, Capital Transport could generate its first reports using the new system.

“We looked at several other CRM applications initially, but kept coming back to Microsoft Dynamics CRM, because it had a familiar interface and integrated easily with our Microsoft Office suite,” says Arthur. “The implementation was very quick thanks to the excellent support we received from JayThom.”

JayThom – an IT consultancy that has won two Microsoft Dynamics Partner of the Year awards (for CRM in 2009 and the public sector in 2010) – specialises in Microsoft Dynamics CRM. It had previously worked with Capital Transport.

“JayThom was able to make the connection between an IT system and what our customers and sales team actually needed,” says Arthur.

Dynamics CRM manages Capital Transport’s entire sales process, through lead generation, pipeline management, activity management and customer retention.

With support from JayThom, Capital Transport developed a points system for measuring the strength of its relationships with customers. This is helping the company to deliver more personalised and appropriate service to each customer.

Following the implementation, JayThom provided scenario-based training and continues to provide ongoing support. “JayThom’s support has been absolutely brilliant; if we have an issue they are always available to help,” says Arthur.

Capital Transport now plans to roll out the system to other areas of the business including marketing, customer service and workflow

management. It also plans to implement Microsoft SharePoint Server to manage documents and help staff collaborate more easily, “SharePoint will be a big part of our CRM system but we will also use it to share and manage information on our intranet and increase access to data and reporting,” says Arthur.

## Benefits

The new system based on Microsoft Dynamics CRM has saved Capital Transport a significant amount of duplicated effort, and improved its sales processes and accuracy of sales information.

A major reason for this success is having a single system that everyone can access. Microsoft Dynamics CRM’s sales component incorporates intuitive, familiar features that have helped Capital Transport improve customer service, shorten sale cycles, increase close rates and gain real-time insight into sales activities and customer data.

“Dynamics CRM has benefited our day-to-day sales, improved our reporting and data analysis capabilities, and strengthened our staff recruitment and retention strategies,” says Arthur.

### Unified sales process across multiple locations

Microsoft Dynamics CRM has helped Capital Transport develop a more robust, coherent and effective sales process.

“Dynamics CRM improved our processes much faster than I thought it would,” says Arthur.

“All our salespeople – no matter which office they are in – can easily dive into customer information and see where an account is at. Our processes and sales activities are much more consistent.

“We’ve got a saying now: ‘if it isn’t in Dynamics CRM, it didn’t happen’. We can record and review our

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emails and phone calls at the click of a mouse, and everything we do in Outlook automatically becomes part of the sales process.”

The new system has also helped Capital Transport capture corporate knowledge to establish and distribute a set of best practices.

Access to accurate and timely information about the sales process has greatly improved Capital Transport’s ability to close deals.

“We’ve achieved record sales in recent weeks,” says Arthur.

“Dynamics CRM has really helped drive our revenue. Obviously it has taken some very good salespeople to do this, but the CRM system is a tool they can’t do without.”

#### **100 percent adoption due to ease of use**

Within four weeks of implementing Microsoft Dynamics CRM, Capital Transport achieved full adoption across its sales team.

“Because Dynamics CRM is so easy to use, and integrates effortlessly with Microsoft Outlook, the system immediately garnered support from all over the country and across all levels of experience,” says Arthur. “Even our more seasoned veterans took it up, which I was excited about.”

“Now our sales staff cannot possibly do their jobs without Dynamics CRM. It’s helping them improve reporting and other processes, keep track of client activity and appointments and, ultimately, increase their sales.”

#### **Accurate, real-time data analysis**

Capital Transport’s senior sales managers can now view and measure real-time information on quoting, tendering and other sales activity.

“I can go from state to state and generate one report to understand the level and quality of sales activity during a particular period,” says Arthur. “When our activity figures

are up, I know that our sales figures will follow. It’s a logical, reliable system.

“Now we base all our business decisions and forward projections on actual activity and real-time data, rather than guesswork and speculation.”

#### **Consistent customer service**

Now that all Capital Transport sales staff are using a single system, they can provide personalised and consistent customer service.

“We’re much more diligent in our approach to customer service,” says Arthur. “We don’t promise things in one state that we can’t deliver in another state, for example.”

“We recently landed a multinational business in Brisbane as a result of providing consistent, professional service to this customer. The information that operational staff can now access from the sales area of the business has been invaluable in helping us work successfully with large customers.”

#### **Flexibility to support business growth**

Microsoft Dynamics CRM has given Capital Transport a strong foundation on which it can build additional capabilities according to its current and future requirements.

According to Arthur, the company will consider integrating Dynamics CRM with its phone system in the future, to enable staff to automatically log phone calls.

“Microsoft Dynamics CRM has given us a tool to strengthen and grow our customer base over the next three to five years with the type of customers we want,” says Arthur.

“We are looking forward to rolling out Dynamics CRM to other areas of the business, with support from JayThom. We see real value in our relationship with JayThom and Microsoft Dynamics CRM.”

## Technical Information

### Software and Services

Microsoft Dynamics CRM  
Microsoft SharePoint Server

### IT Issues

Capital Transport needed a CRM system to manage its sales process, establish and enforce consistent practices across all offices, and perform more accurate data analysis and reporting.

## Microsoft Product that was featured

Microsoft Dynamics allows your business to streamline and automate customer relationship management through an intuitive interface that works exactly like the other Microsoft applications your staff already use.

### Increased sales

Microsoft Dynamics CRM has been designed to help you discover the potential of your customer base, with 360-degree insight into the status of current customers as well as prospects, allowing you to maintain closer and more efficient contact at all times.

### Better customer service

As well as a streamlined sales cycle, you'll enjoy better customer service, with automated processes that reduce customer handling times and ensure that your customer service is delivered consistently across all touch points.

### Better market insight

With Microsoft Dynamics CRM you can manage all your sales and marketing initiatives and track results.

In turn your business is better equipped to meet customer needs and respond to changing markets before your competitors do.



### Partner Information

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### For More Information

For more information about Microsoft Dynamics call a Microsoft Dynamics Sales Consultant on 1800 197 960 Monday to Friday 9am to 6pm AEST. To find a partner or solution, visit

<http://dynamics.pinpoint.microsoft.com/en-AU/home>

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