

## AAA Cooper Transportation

### Transportation Case Study

*"The number one word that comes to mind when I think of Fullscope and their team and their leadership is advocate. Whether it's through Dynamics CRM University, Adopt2Win, or executive meetings, they have always had a solution. They have always listened to us and they've also been a friend and a partner. Fullscope helps us obtain the best that we can from Microsoft Dynamics."*

**Wesley Hilson, Manager of International Management Services**



AAA Cooper Transportation® (SCAC "AACT") is a privately held asset based multi-regional transportation solutions provider offering less-than-truckload, truck load, dedicated contract carriage, brokerage, fleet maintenance, and international services. With directly operated facilities in the Southeast, Southwest, Midwest, and Puerto Rico, along with carriers with coverage into Canada, Mexico, and across the globe, ACT can service nearly all transportation needs.

In 2011, ACT was using a CRM system that was not user friendly, and was not being utilized by its sales team. "We needed better account visibility for our sales team," says Wesley Hilson, manager of international management services for ACT. "We were also looking to provide a more user-friendly platform than what we were on at the time," continues Hilson.

The team at ACT was looking for a single-source solution that would provide account visibility to its sales team, and improve user adoption. "Because our previous CRM system was not user friendly, it caused anxiety for our sales team," adds Kathy Buchanan, CRM System Administrator for ACT.

Edgewater Fullscope introduced ACT to Microsoft Dynamics CRM. "Fullscope helped us analyze and review our requirements as a company, and develop the best solution possible that would promote user adoption as well as being user friendly, so that our end users could better engage with our customers," says Buchanan.

### Key Benefits

- A single-source solution
- Better account visibility for sales team
- Improved user adoption
- Alleviates sales team anxiety in an easy-to-use solution
- Building block for future growth
- Better servicing customers than competitors
- Managed Services Division has grown 2400% in revenue
- Reduced Managed Services quote time from 2-3 days to 15-20 minutes
- Tighter control over price requests and margins
- Improved contract management

After implementing Microsoft Dynamics CRM, the ACT team participated in Fullscope's black belt training. "Fullscope's black belt training really helped us to advance our knowledge and learn all aspects of the software to provide the best end user experience," says Buchanan.

"Microsoft Dynamics has helped us position our company for the future by providing the building blocks to promote growth," says Hilson. "In our industry we sell time and space...that's it. We have to provide a better customer experience than our competitors," continues Hilson. "As our company grows, and our requirements change, we can build on this foundation."

After utilizing Dynamics CRM for over four years, the team at ACT added 150 on-premise Dynamics CRM licenses for their customer service team. Fullscope worked with ACT to implement lead, account, and opportunity management along with a structure to manage and report on customer service calls.

"The Fullscope team has helped us over the years by listening to our needs and requirements as a company to help develop a solution that led to increased user adoption," says Hilson.

## Managed Services Automation

ACT further automated its business with automation of its Managed Services division, which helps customers fulfill, monitor and ensure delivery. Previously, one clerk handled these requests by phone, and it could take up to two or three days to generate a quote. "With these truckload brokerage deals, you are under a time crunch to respond," says Hilson. "Whoever gets a quote back first, gets the deal."

Now, with Microsoft Dynamics, the quotation process is automated, which has reduced response time from 2-3 days to 15-20 minutes. "Reps can now fill out eight fields in Dynamics, and everything else is automated from there," describes Hilson. "Everything is so much faster, it eliminates confusion, and if the commodity is marked hazardous, Dynamics automatically fills in the price. As a result, ACT's Managed Services division has grown 2,400% in revenue since utilizing Dynamics."

## More Productive Sales Team

Microsoft Dynamics provides the ACT sales team the tools to become more productive and focused on building customer relationships. Additionally, the sales team is less reactive, and can spend time maintaining and enhancing new and existing customer relationships. ACT is now able to track when shipments have been delivered, and ensure that tariff calculations are correct.

The sales team is better managing its pipeline, and has opportunity information at their fingertips for weekly review sessions. "In more and more conversations I've had, I've heard that by 2020, the customer experience will trump price, and that really resonates with us," says Hilson.

## Price Request Module

AAA Cooper set up a module within Dynamics which handles pricing requests from sales territory managers. The pricing team sees requests pop up on their screen, and they create a rate for a new customer, or make changes to a current customer's pricing rate. "This process monitors and better manages our pricing requests overall," says Buchanan. "If a contract customer is up for renewal, they receive an email notification from Dynamics 120 days in advance of the contract expiry. National account managers and sales territory managers can then review the rates with their customers. Additionally, we have tighter control over margins. If a customer tells us they are shipping one type of product, but it ends up taking up more space in the trailer, the system allows the pricing analyst to abandon the current pricing request and create a new one to account for the correct information – greatly saving us money," continues Buchanan.



*"Our vision for this CRM project was to provide a better customer experience than our competitors, and Microsoft Dynamics has helped us do so."* - Kathy Buchanan, CRM System Administrator

## Sales Onboarding

ACT is utilizing Microsoft Dynamics CRM to ease salesperson onboarding and align sales behavior with best practices. Business process management along with interactive help and documentation boost performance, morale, and business application adoption. "We have a new sales training called 'Impact,' whereby we go through the sales cycle step by step," says Hilson. "It's all about the quality of the sales call, not the quantity."

## Accounting Integration

Microsoft Dynamics is integrated with ACT's back office accounting system. "Once we secure a load, I approve it and assign a sales rep within Dynamics, and it sends it directly to Accounts Receivable to perform a credit check and issue a credit limit," explains Hilson. "The system pretty much takes care of itself now. We have such better visibility into the business, as far as managed services, incentive goals, revenue, profitability, and past due accounts. Before implementing Dynamics, we had limited visibility into all of this."

## About Fullscope

Edgewater Fullscope delivers innovative Microsoft ERP, CRM, BI and digital solutions and services on premise or in the cloud to companies in North America and Europe. The award-winning company is one of the largest resellers of Microsoft Dynamics 365 (formerly Dynamics AX and CRM). We also offer strategic consulting delivering a blend of classic and product-based consulting services that help clients reduce costs, improve processes and increase revenue through the judicious use of technology. We continually fine-tune our process and user-adoption programs to give you the maximum return on your investment. This commitment to stay with you throughout your Dynamics 365 journey has earned us the highest customer retention rate in the business.