

ACHIEVING MATURITY IN CUSTOMER RELATIONSHIP MANAGEMENT

MCLEOD USERS
TALK ABOUT
USING CRM



Every proponent of customer relationship management software claims that CRM magnifies the effectiveness of sales efforts. This is true, but there's a catch. In order to reap the benefits that CRM offers, you have to do more than just buy it and turn it on. You also need an effective strategy and the discipline to follow through on your ideas. Software products are tools that empower you to do more. CRM can be extremely effective if you are disciplined and use the tool in ways that support a concrete set of goals for advancing your customer relationships.

The true potential for CRM is achieved only when it is used as much more than simply a contact management system. Companies with the most successful CRM deployments are using the software to drive these critical components of their sales efforts:

PLANNING

Planning is crucial for all sales efforts and CRM can serve as a framework for ensuring that a strategy is in place and being executed. The sales process should include a detailed list of actions that is tailored for each individual. CRM provides the perfect way to lay out responsibilities and goals for both individuals and the entire team. You gain the ability to enforce your process and the planning discipline.

REPORTING

There is an old saying, "You will get what you measure." That's why good reporting is essential and the key to accountability in any sales management scenario. Staff and management must have a clear understanding of what has happened, what is happening now, and what is expected to happen. Evaluating the effectiveness of past campaigns is crucial to planning the next one. Clear visibility into the execution of your current plans and campaigns gives you the chance to make corrections and move the campaign closer to your goals.

EXECUTION

After a plan and a process are in place, the next step is execution. A good CRM will help your team follow through in ways that ensure nothing falls through the cracks. Each person will be assisted at each step along the way. The CRM maintains the discipline necessary to execute every detail of your plan and your process.



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CRM FOR THE FREIGHT TRANSPORTATION INDUSTRY

The McLeod CRM module is designed specifically for the freight transportation industry, and it brings the power of the entire McLeod Software LoadMaster® Enterprise or PowerBroker® system to the task. By being completely native to LoadMaster and PowerBroker, McLeod CRM delivers all of the data and tools your sales staff need in a system familiar to everyone.

Even more importantly, everything is in one place—all of the data and history about your entire sales effort, including current business and past dealings. Redundant data entry and the need to synchronize external CRM systems are gone. All of the data is already in the system, so you don't have to import anything. It's automatically there. Being tailored to fit the industry means that McLeod CRM provides a complete 360-degree view of everything your sales team needs to know about prospects and customers. The software brings operations and sales together and connects the dots by providing visibility from every angle.

MCLEOD CRM USERS

Meadow Lark Companies, GIX Logistics, Kingsgate Transportation, and Eagle Transportation are four freight transportation companies that are using McLeod CRM to find new customers and boost revenue from existing customers. Representatives from these companies share their experiences of the advantages this tool can bring.

MEADOW LARK COMPANIES

Meadow Lark Companies, which operates out of Billings, Montana, offers transportation solutions for shippers across the country. In addition to working with carrier partners through the logistics side, Meadow Lark works with over 150 owner-operators who run flatbeds, vans, heavy loads, and LTL. The company also sells work wear designed for the trucking industry. Theresa Cremer, Vice President of Sales, and Karmel Dabner, Executive Assistant, explain that McLeod CRM is used throughout the company. "Every day almost every single person in our building uses McLeod CRM," Cremer says. "It's used by at least fifty people." The staff has responded well, says Dabner, "People feel that the CRM is helping them do their jobs."

- **CRM IS USED THROUGHOUT THE COMPANY**

"Essentially, CRM is what our staff lives by every day in communicating with our customers to make business go. We've tweaked it to make it work for every aspect of our sales."

- **MANAGING RELATIONSHIPS WITH CARRIERS**

"We do everything around carriers out of CRM. We update lane information and note where they go the most. I can use CRM to make sure each person has access to the same information and the same marketing plan. This streamlines our sales process, because everyone is using the same technique."

- **FINDING CUSTOMERS**

"All of the people we talk to are in the transportation industry. We may be talking to a carrier about a lane and then want to talk to them about the extra freight that they have. We need to see all of it in one spot, and that's what CRM gives us."

- **MARKETING PUSHES**

"We have some people who track regions and they use CRM to make sure they're following up on leads in that region by setting up marketing plans and callbacks for those prospects. We have marketing pushes for certain types of freight. Finding the prospects through the CRM works great."

- **NAVIGATION IS EASY**

"It's easy to navigate from one screen to the next. You can jump to different screens, such as location, prospect, and more. If you need to go into the customer screen or the location screen or find out what's been going on, how many orders we've done, all of that links together, which in our previous system was not so easy. We can see the receivables, how many orders we've done, the past follow-up, whatever we need to see, in that one spot."

- **MANAGERS HAVE VISIBILITY**

"The reports that you can run help managers. If something's not happening, we can run a simple report and find out what's going on and determine what we need to do to be better."

- **MANAGING OBJECTIONS**

"CRM is great for teaching people how to manage objections, especially for newer people who may not completely understand the objections. CRM guides them right through it."

- **MOVING THE FREIGHT**

"CRM keeps us organized and ready to book the freight and move it. It doesn't get much simpler than that. It shows us who to call, when to call, and the purpose of each call. To be effective in this industry, you need that."



GIX LOGISTICS

GIX Logistics, which operates out of Grand Island, Nebraska, specializes in handling refrigerated commodities, while also providing van, flatbed, LTL, and intermodal services. Mike Young, Vice President, and Justin Vogel, Sales Representative, say that sales reps live in the planning screen. “CRM acts as a one-stop shop for documenting customer conversations and progressing through your relationship with each customer,” Vogel says.

- **A MORE EFFICIENT PROCESS**

“Sales reps don’t have to toggle between screens. They can handle their work more efficiently. CRM takes us through the progression from prospecting a customer and making that first point of contact to following up, whether it’s days, weeks, months, or years of communicating with that customer. We now have a quick, easy way to track each relationship, and it’s all right in that one spot.”

- **MULTI-PURPOSE TOOL**

“We use CRM for a dual purpose—as a prospect-tracking tool and as a relationship management tool for existing customers. It helps us keep up with tasks—Have I made my sales calls? In which step of the relationship am I with this prospect? Which marketing plan am I working in with this prospect?”

- **MARKETING PLANS**

“After we’ve hauled the first load for a new customer, and they’re generating a certain volume of freight with us, they get pushed over to another marketing plan that focuses on relationship-building. In this phase, we reach out in more ways, such as face-to-face visits, catered lunches, or customer events. CRM helps us manage everything as we develop closer ties.”

- **MULTIPLE POINTS OF CONTACT**

“At some customers, we have multiple points of contact who connect with different people in our office. For example, Chad might reach out to Brianna, Cathy might reach out to Dennis, and Greg might reach out to Jackie. With CRM, it’s simple for everyone to record and track all of the activity in one place. You can assign tasks to each person to handle each week, even though they’re all on a different schedule with their corresponding points of contact.”



- **MANAGING IS EASY**

“Reporting, from a management standpoint, is excellent. We have easy, quick, and extensive access to information about how everyone is performing. It’s transparent. It’s easy to see how many prospects are being converted to actual customers by our sales reps, it’s easy to see their comments, and it’s easy to see their progression through each step of our sales process. We can see which step of our marketing plan they’re on, how the last call went, and when the last update was.”

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KINGSGATE TRANSPORTATION

Kingsgate Transportation, which operates out of Cincinnati, Ohio, provides third-party logistics solutions for shipments of any size to anywhere in the world. Jeff Beckham, Partner, says that CRM helps Kingsgate be more agile. "CRM puts information at our fingertips," he says, "and I can see how quickly we're turning prospects into customers."

- **MARKETING PLANS**

"Creating marketing plans within CRM is easy. We can lay out objections and responses to overcome those objections, which means that we can take someone who's new to the industry and train them quickly. It's also easy to change or add to the marketing plans as things evolve with our prospects, and with the call list function, it's simple to look at all upcoming marketing activities."

- **INTEGRATION WITH POWERBROKER**

"The fact that CRM is part of McLeod makes everything so much easier. We don't have to input data into a separate CRM package. Integrated reporting is a huge part of this. We have easy access to key metrics, such as calls made, calls closed, bids submitted, quotes, win rate, and more. If we used a different CRM product, we would have to manually enter all of this data. With McLeod CRM, it comes automatically straight from PowerBroker. We don't have to transfer files. We don't have to download or upload anything. It's there."

- **ONE SOURCE FOR INFORMATION**

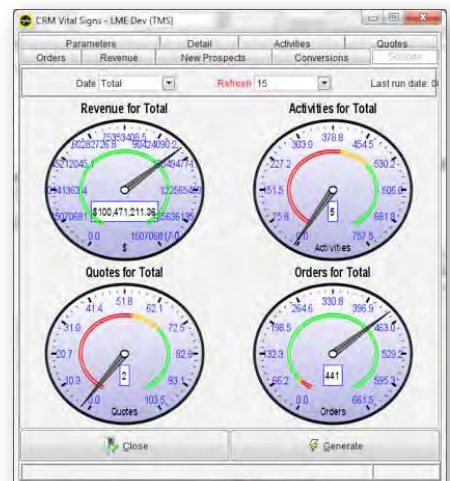
"CRM is where we put a note if we had a problem, if there's an ongoing issue. It could be, 'Don't ever send carrier XYZ to this customer again, because they were late or their driver was rude.' We use it quite a bit to make sure we've got the touch points. If we can build a great diary in CRM, then we've got the information that we need at our fingertips. Likewise, if someone quits or is away from the office due to illness, that information is right there. It's not like an individual has put information somewhere that only he or she knows how to retrieve."

- **STAFF RESPONSE**

"Our staff is embracing CRM. It makes their lives so much easier. Previously we were updating customer files in a much more archaic way. Sometimes you'd remember to do it, sometimes you wouldn't. Now with it here right in front of you, you just scroll over, drop down, and boom, it's sitting there, ready to be entered."

- **VITAL SIGNS**

"CRM Vital Signs helps us measure broker performance as it relates to sales activity. The management team can go through and see what the activity level is. If we see something that doesn't look right, we can take action quickly to address the problem."



EAGLE TRANSPORTATION

Eagle Transportation, which operates out of Hattiesburg, Mississippi, provides freight management services for shippers across the country. David Kraitzick, Senior Vice President of Sales and Marketing, emphasizes the value of being integrated with PowerBroker.

"McLeod CRM is a one-stop shop," he says. "That drove us to use CRM over lots of other options. We don't have to go between two different systems."



- **BUILT FOR THE TRANSPORTATION INDUSTRY**

"McLeod's CRM is built around our language and our lingo in the transportation industry. I think that's helping us use it."

- **TARGETING COMMODITIES**

"We've targeted certain commodities, such as dairy in California or poultry in Georgia, and used CRM to support these efforts. We took leads, imported them into the CRM, and then prospected from that list, focusing on poultry in Georgia, for example. From that process we were able to find a number of poultry shippers."

- **NO LEARNING CURVE**

"It's very quick—half an hour of training. Our staff likes McLeod CRM, because it's easy to use with what they're doing. Their commissions and their success are based on the reporting they do within CRM."

- **EXPORTING DATA**

"It's nice to be able to export data out of the CRM easily. This could be problematic with other CRM software. It's convenient to be able to pull out the data to an Excel spreadsheet. People can print it out, put it on their desks, look at it, and make notes as needed. We like that option."

- **USED BY OUR MOST SUCCESSFUL SALES STAFF**

"Our sales staff uses CRM to keep themselves organized. The people who are the most successful are the people who are using the CRM more extensively."



INTEGRATION MAKES MCLEOD CRM THE PERFECT FIT

McLeod CRM was built from the ground up on the existing databases for LoadMaster and PowerBroker and it was specifically designed for the freight transportation industry. LoadMaster and PowerBroker users will find no other CRM software that can match McLeod CRM for its breadth of information, which powerfully drives planning and activity. Are you trying to turn more prospects into customers and boost revenue by deepening your relationships with current customers? McLeod CRM is the perfect tool to help you reach those goals.



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