

Microsoft Dynamics CRM

On the road to success with Microsoft Dynamics CRM

For more than 36 years, Tax AirFreight, Inc., also known simply as Tax-Air, has built a solid reputation for being the finest air freight trucking company throughout Wisconsin and the Midwest. In a continuing effort to provide customer-specific service solutions to keep their business moving, the Milwaukee-based Tax-Air required a sophisticated customer relationship management (CRM) system which could efficiently evolve with their company. "As Tax-Air moves forward, we want our technology to move forward with us," said Amy Fenner, sales and marketing coordinator at Tax-Air.

Tax-Air first engaged with TopLine Results in 2007 when the organization was searching for a simple tool to track communication and pipeline information. Act! was a logical starting point for Tax-Air and would help establish a culture for using CRM. As the organization grew and the CRM requirements became more complex, transitioning to Microsoft Dynamics CRM under the guidance of TopLine Results was the natural next step.

"Working with TopLine Results has been great. Fred Varin gave us a presentation about what CRM could do for Tax-Air and I fell in love with it. Our salespeople also loved it," said Ms. Fenner. "CRM is more user-friendly, easy-to-read and it's fast. Our salespeople also like that it's so accessible and they can use it on their iPads® and mobile phones."

More than a dozen business development managers within Tax-Air's sales department and logistics division use the Microsoft Dynamics CRM system to track the company's opportunity pipeline. "We want to be able to track what kind of revenue-generating business is coming in and then budget our needs based on those opportunities," added Ms. Fenner.

On time and on budget

Amy Fenner received the green light from her CEO at Tax-Air to engage with TopLine Results for their upgrade to Microsoft Dynamics CRM at the end of December 2011. The project was kicked off the following month with a needs analysis to determine the implementation plan and ensure success.

TopLine Results guided Ms. Fenner and her staff through the implementation process. The system was initialized and database development, Act! data conversion and user configuration was completed within thirty days. The project proved successful thanks



Customer

Tax AirFreight, Inc.

Industry

Freight Transportation and Logistics

Location

Milwaukee, Wisconsin

Number of users

13

Product

Microsoft Dynamics CRM

Scenario

Air freight and transportation firm needs a robust and scalable CRM solution with shipping system integration

Solution

Implement Microsoft Dynamics CRM with a partner-hosted solution

Outcome

Higher user adoption and productivity with improved business intelligence

to the TopLine Results team. "It was a very smooth transition. My goal was to not give more work to our salespeople and with the guidance of TopLine, the entire process went without a hitch," added Ms. Fenner. The project was delivered on-time and on-budget culminating with custom training at the TopLine Results offices in Milwaukee.

"The training session was awesome. We were able to bring in our salespeople from all over the country for the one-day session. It was so helpful to have that face-to-face training. We have been up and running for over a year and the system has never failed once," said Ms. Fenner.

Systems integration yields productivity

Easy access to information and sales opportunities, along with the ability to more efficiently utilize that information in meeting the needs of their customers were crucial features on Tax-Air's wish list as they upgraded to Microsoft Dynamics CRM. A subsequent phase of the implementation was the integration of Tax-Air's Ultra-Pro shipping system with CRM.

"We integrated our customer shipment system into Microsoft Dynamics CRM. Now salespeople have access to the shipping and revenue information on a daily basis on one platform instead of three," added Ms. Fenner. "It's a great time-saving tool."

Business intelligence and marketing

According to Ms. Fenner, the leaders of Tax-Air have also been very pleased with the increased detail afforded by the reporting function of Microsoft Dynamics CRM. "I report to the Director of Sales and also have a dotted line to the President and the CEO of our company, who is very report driven and also has to give those reports to our executive staff. They like to see high-level reporting. I can give that to them with Microsoft CRM. I can also drill down reports for the salespeople in any which way they want to see the data. That flexibility is a huge return for us in how the program works," explained Ms. Fenner.

"TopLine has guided us to the best options and tools for our company."

Amy Fenner
Sales and Marketing Coordinator

Tax-Air is working with TopLine Results to incorporate Microsoft Dynamics CRM into its marketing efforts including email marketing integration and social media. "This marketing phase of the CRM initiative will take us to the next level and we know that TopLine Results will have a hand in helping us get there," said Ms. Fenner.

Hosted solution = peace of mind

During the planning phase of the project, Tax-Air chose TopLine Results to host its database. Hosting with TopLine Results allowed the project to be completed faster and with less cost and hassle for Tax-Air. Cloud-based CRM eliminates the need to invest in server hardware and software. "My IT department loves it. Partner hosting with TopLine Results has lightened their load and also gives us a direct connection to support when we need it. It has been a wonderful experience and we turn to TopLine again and again for help," said Ms. Fenner.

"I have to commend Fred Varin and his staff. They have been awesome through our integration and implementation and training. They've been there when we've needed them for support," commented Ms. Fenner.

"If I have a salesperson that for example, can't get into the system, I know I can quickly give them a call and shortly we are back up and running. It's a great feature to have hosting with TopLine."

The measure of success

TopLine Results is a true partner for Tax-Air's CRM solution, providing support for the system now and guidance in planning for future phases. "TopLine Results has been a very reliable partner. They have been there when we had questions. TopLine has guided us to the best options and tools for our company. Working with the TopLine team and adopting CRM has definitely increased my productivity and has made my job easier," added Ms. Fenner. "It was obviously an investment for our company and the system must be used to see a return on that investment. It's working because our salespeople are using it."

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ABOUT TOPLINE RESULTS CORPORATION

TopLine Results Corporation is a customer relationship management (CRM) consulting firm specializing in Microsoft Dynamics CRM, Act! and Saleslogix. Services include cloud-based CRM via hosted solutions, system design and implementation, and training. TopLine Results also develops custom applications which integrate with Act! and CRM. Headquartered in Wisconsin, with offices in Chicago and St. Louis, our mission is to empower companies with customized CRM solutions which increase effectiveness in sales, marketing, customer service and overall business performance.

