

CASE STUDY:

Railinc Implements SugarCRM and Connects its Railcars Nationwide

Railinc Increases Lead Flow and Shortens Response Time with Sugar.



Railinc
railinc.com



Initially created as the IT department of the Association of American Railroads (AAR) over 40 years ago, Railinc provides software and data services that support railroad business processes, improve safety and operations, and increase productivity. The company was established as a wholly-owned, for-profit subsidiary in 1999.

Railinc facilitates rail industry communications by serving as a central hub connecting more than 550 railroads, 1,700 private railcar owners and hundreds of logistics providers across North America. The company processes more than 9 million messages a day over its EDI and XML network including transportation waybills, advance train consists and blocking requests and responses.

Railinc continues to grow by narrowly focusing on the industry and applying its rail data and technology expertise to overcome industry challenges and keep railcars moving.

Business Challenges

Before implementing SugarCRM, Railinc was using both Marketo and XSalator to manage its sales force and organize its leads. In addition, Railinc had other systems handling customer and contact information making its maintenance difficult and inconsistent. Railinc wanted a better way to manage its sales and customer relationship efforts without creating silos with its data in disjointed applications.

Railinc hired a consulting firm to help evaluate the needs of the company and identify which system would be more appropriate

for its business. Railinc was determined to find the right CRM to scale its company and after much evaluation, SugarCRM came out on top. The next step was to find the right partner.

Railinc sought the opinion of other transportation providers that were using SugarCRM to get recommendations on partners. They connected with W-Systems customer uShip, the world's largest and most trusted transportation marketplace. After receiving a great referral from uShip about W-Systems and its services, Railinc chose W-Systems to revamp its SugarCRM efforts and remodel its system.

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The Path to Success

Railinc needed a flexible system that was within its budget. After evaluating the major CRM systems on the market, they felt SugarCRM was a good fit because it offered them a flexible platform that could replace the multiple systems it had in place. Before Sugar, the sales team and the account managers were currently using the same tool, but not the same instance. Railinc needed a more efficient way for their sales team to support the flow of new opportunities. The Industry Relationship Directors also needed a better way of gathering information on each customer to prepare for trips, meetings, and company events. The first step in the deployment for Railinc was to merge its efforts and migrate its data to Sugar so that everything would be in one place.

The next stage included tying in Railinc's MDM system with Sugar. The MDM application gathers data from systems that have company and contact information, assesses its quality, cleanses it, merges it as appropriate, and then notifies source systems of data issues that should be corrected. The W-Systems team migrated data from Railinc's MDM system to Sugar and related each customer with its proper support group in the system. This also helped with Railinc's ability to understand relationships and pair railroad industry committees to the right customers.



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Railinc was using multiple spread-sheets to identify the relationships surrounding each of its customers. With SugarCRM in place, team members can quickly identify each customer's relationships and how they may tie to a parent company. For example, this is extremely helpful when identifying "committees to contacts" and "committees to accounts." A lot of Railinc's business is driven by industry committees and understanding how these relationships change and shape their business is instrumental to its success.

"The sales team feels like they have saved at least five hours of their time a month. They are spending some additional time on data clean up, but they understand the future benefits of that. I think the big sign is that we have more people that want it. The more people that see our new system, the more people that want it, and actually our parent organization has been asking for Sugar, so that is a big bonus," said Cathy Herb, Senior Manager, Customer Support.

Success Factors

One of Railinc's most significant requirements when implementing SugarCRM was to integrate its MDM system and older data with Sugar successfully. Rail - inc's engineering team worked closely with W-Systems and they were able to get Sugar up and running quickly.

"We have worked with other W-Systems engineers, but our primary engineering contact at W-Systems has been Jeremiah. He is very responsive and I can't say enough good things about him. When we were working with our MDM sync he was working with our IT developer and their chemistry was just great. There weren't any issues, and the process went smoothly, and the quality of his work is excellent," said Tammy Herrera, Sugar Administrator/Business Analyst II.

Since deploying Sugar and working with W-Systems, Railinc has experienced faster response times, additional lead flow and better management of its reports. They have been able to leverage the Sugar forecasting tool and workflows, enable users to have remote access, and expand its visibility on all fronts. Railinc's reports are now tailored to show the data it needs and is easier to display using Sugar's dashboards. The fluidity of data between both its MDM system and Sugar and the ability to recreate strategic account reports for the sales team was another bonus.

Team members are eager to get into the system and get to work and Railinc is migrating all of its departments into SugarCRM. While migrating data from its MDM system, Access databases, and multiple XSalerator instances was a bit challenging at first, with W-Systems's help, Railinc is now successfully integrating its entire business team into Sugar.

"Since the beginning when W-Systems made a trip up here to help us, we have had a wonderful experience with their team. At first, we had a really bad taste in our mouth from a previous Sugar vendor, but W-Systems came in and won our entire team over. The W-Systems team just really knows what they're doing with SugarCRM, and it's really amazing what they were able to do with the hours we allotted," said Herrera.



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Tammy Herrera,
Sugar Administrator/Business Analyst II