



English

Analyze

Improve Staff Performance

Record Appointments

Streamline

Lower Costs

Track

Financials

Manage

Sell

Store Contacts

**CRM** in  
**5 minutes**  
a day

## HydraNet CRM-gx™ White Paper Series A Revolution at Allied Global Movers





***"We've got 28 offices and 28 different systems. We need a common platform to link our offices together."*** - Branch Manager, Tokyo, Japan

**Problem:** Allied Global Moving\* started as group of independent relocation companies, and each office had developed their own information management solution. The result was there was no common platform upon which the offices could share, collaborate, and exchange key customer and transaction information.

**Solution:** Setup CRM-gx™ Enterprise with separate but shared data folders for all 28 offices in the company. Imported the existing customer information for all 28 offices (a total of more than 75,000 clients). Distributed login and password information to all the users.

**Result:** For the first time, Allied Global Moving had a shared platform across 28 offices that allowed them to **instantly share and exchange information** about customers, deals, and client activities. Collaboration between the offices was suddenly a viable and very real option. Management immediately began sharing key files about pricing, policies, contracts and even corporate logos using the built-in Virtual Fileserver. Staff and management began communicating via the built-in IMX Instant Messaging feature, saving valuable time and **resolving problems instantly** that often had previously required long email exchanges or playing phone tag. Most celebrated of all was the fact that top management could take a "single enterprise view" of the organization for the first time. They could **analyze the performance of individual offices or view the performance of the whole group** for any specified time period with just a few mouse clicks.



\* Actual company name changed to protect the innocent



***"We need to start going after global accounts on a global basis, rather than an office by office basis."*** - Board Member and Branch Owner

**Problem:** Allied Global Moving believed they were missing opportunities to sell to large global and regional accounts. "Let's say I close the IBM account here in Tokyo and start developing that relationship," explained a senior manager in Tokyo. "That is an opportunity for all our other offices across the region who aren't already working with IBM to approach them and say 'Hey, were already doing business with you in Tokyo, why or not work with us in this location as well?' We need to start going after global accounts on a global basis, rather than an office by office basis."

**Solution:** CRM-gx™ introduced Allied Global Moving to a report specifically designed to generate leads on a local basis from the sales activities in other offices. The report is a database query that says "Show me the new clients generated by other offices around the world."

**Result:** The sales teams in each Allied Global Moving office were presented with a monthly report showing the new clients their overseas counterparts were closing. Management decided to assign one salesperson in each office to contact the largest clients on the report and set up global relationships. Within 3 months, **Allied Global Moving had negotiated 13 new global relocation contracts worth \$975,000**. Increased revenue was just one of the benefits. Global contracts and relationships resulted in **higher customer loyalty**. The global contract meant Allied Global Moving no longer had to fight and scratch to win every deal in a competitive environment. **Margins increased by 14%** at accounts where there was a global contract in place. And the same time, the global clients have also welcomed the opportunity to work with with a single relocation company under a single arrangement, with more predictable costs and service levels.





***"Our offices could be providing actionable intelligence to each other, improving our results as a whole. Right now we're all functioning like separate businesses."*** - Branch Manager, Manila, Philippines

**Problem:** In the relocation business a move from Point A to Point B often implies a move from Point B to yet another location. This process was likened to balls striking each other on a billiard table. "Let's say someone is moving from Singapore to Tokyo," explained the Manila office manager. "That means it's very likely that someone else will be moved from Tokyo to another location, and so on. What happens now is that the salesperson in Singapore finds out about the move, but unless we actually book the business, Tokyo is never informed. What should happen is as soon as we hear about the move, our Tokyo office should be notified so they can immediately contact the client and see who might be moving. Regardless of whether we book the business or not, it's still an opportunity to the folks in Tokyo."

**Solution:** Allied Global's Deal system in CRM-gx™ was setup so that as soon as a new Deal was added, the Destination agent automatically received a notification about the potential Deal. This allowed them to immediately call the customer locally and inquire about other potential moves. Because the notification was generated automatically, there was no need for the salesperson to phone or email the destination agent.

HydraNet then assisted Allied Global in setting up a "Incoming Moves Report" for each office using the Advanced Custom Reporting System. The report gave each office a summary of all the incoming potential and booked deals. These reports were automatically generated and emailed to the appropriate manager in each respective office. These reports were setup in a matter of hours using the menu-driven Advanced Custom Reporting System.

**Result:** Each business day, every Allied Global office received a report providing market intelligence about which companies were moving people into their region. Using the information in the report, the salespeople across the region were able to get an early jump on new relocations, some of which hadn't even been announced. The results was that after 3 months, **31 additional moves were booked, generating an additional \$413,000 in revenue for the group.**







***"We have no concept of workflow. People are just running around putting out fires." - Branch Manager, Tokyo, Japan***

**Problem:** Allied Global Moving needed a better system for tracking their deal pipeline. Currently, most offices were keeping the pending deals on a large whiteboard. "It's a mess and we've got to resolve it," confided a manager. There were more deals than space to fit them on the whiteboard, and there simply wasn't an easy way know at a glance what was happening with each deal.

**Solution:** The HydraNet CRM-gx™ Deal system is driven by a customizable workflow and transaction management module called 5 STARS. HydraNet consultants assisted Allied Global Moving management in configuring the system to match their deal pipeline. A senior Allied Global Moving manager described the impact of implementing 5 STARS across the organization: "The HydraNet 5 STARS system really **had a profound impact on our effectiveness in managing opportunities and moving these opportunities faster through the pipeline**. Two aspects of 5 STARS we're key to making this happen. First, the system automatically notified the key manager at each stage of the deal, all the way through to accounting. Second, the reporting system built into CRM-gx™ allowed our teams to view the deal pipeline stage by stage. The salespeople instantly could see the pending deals they needed to focus on closing. The operations team could see which deals were booked that needed shipping. The shipping department could see all the moves in transit that they were responsible for. The accountant knew all the deals that had been completed and were ready for invoicing. The whole process was transparent and automatic."

**Result:** The whiteboard was scrapped and became a graffiti board. Salespeople reported that they could spend more time selling and less time trying to track opportunities. Management was happy to make the transition from chaos to a finely-tuned machine. The **sales cycle shortened 22% and sales productivity** (measured in terms of number of client visits and number of calls to customers) **rose 18%** during the first 3 months of the implementation.





***"Customers would call to follow up on an issue and unless the same person happened to pick up the call, we had no idea what was going on." - Branch Manager, Singapore***

**Problem:** Allied Global Moving was struggling to keep track of their client activities, and it was causing problems for both the sales team and customer support. "I'd call a customer and the customer would say 'Hey, I just got a call from another salesperson over there....don't you guys talk to each other?!'" Customer service was also struggling without a system to track customer service tickets. "People would call to follow up on an issue and unless the same person happened to pick up the call, we had no idea what was going on. It was embarrassing." Client activity histories were recorded "in the head of the account manager," which lead to complete paralysis when the account manager was out of the office. Email sent to the clients was accessible only to the account manager who sent the email. When an account manager left the company for whatever reason, it caused an enormous amount of pain, since all the information about their accounts were stored in a private MS Outlook Email box and the account manager's brain. "Essentially, everything we knew about the account walked out the door when the account manager left."

**Solution:** HydraNet CRM-gx™ has a simple, easy-to-use system that makes tracking client activities a snap. During a short, hands-on training seminar, HydraNet consultants showed the Allied Global Moving sales and customer support staff how they could record appointments, visits, calls, emails, faxes... essentially all their interactions with customers in less than 5 minutes a day. HydraNet explained to Allied Global Moving management that during the first few weeks that it would take some discipline and enforcement to insure that the sales and customer service teams continued to use the system, rather than going back to their old ways. HydraNet showed management reports that they could run that would instantly show them who was entering their activities and who wasn't. The sales and customer service teams were reminded that while recording the information wasn't particularly fun, it took no more than 5 minutes a day. A company meeting was held to reinforce the point that keeping proper client records was essential to the health of the organization, and the success of every individual within the organization.

**Result:** "Within two weeks of starting to use the system, **our client information management skills were transformed**," said an Allied Global Moving Branch Manager. "Some of the users resisted change at first, but we continued to stress that getting the information into the system really was easy, and **it really didn't take more than 5 minutes a day** at most. As a result of having the information in the system, we suddenly had all kinds of actionable intelligence generated by HydraNet.  
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**Result (cont.):** "As a result of capturing this information, here are just some of the questions we started getting answers to:

- Which of our accounts are really profitable?
- Which accounts should we focus more time on and which should we set aside?
- How much are we spending on customer service by customer?
- What are our sales costs by customer?
- Which of our salespeople and customer service reps are most effective?
- What can we do to increase our overall sales effectiveness?
- What can we do to lower our customer service costs?
- Which of our marketing campaigns are actually generating positive cash flow?

What we really learned, in essence, was how to allocate our time to be more effective. We found that we were spending an inordinate amount of time providing service and support to certain not-so-special clients. I was surprised to see that **we were actually losing money on some accounts I thought were profitable**. We also discovered that other, more **profitable customers weren't getting the attention they deserved**. This led to a major overhaul of the way in which we provided service to the customer. We completely changed our customer service focus. Rather than simply having a knee-jerk reaction to customer demands, we started making intelligent decisions about how much time and energy we would spend. **Our best customers got better service, and we stopped over-servicing the less important customers**. We also discovered that some of the salespeople were spending way too much time selling to a few "important" accounts. We set down rules, deciding that we wouldn't spend more than \$500 trying to close an account, regardless of its potential. This allowed us to refocus our sales attention and eliminated our tendency to over-invest our time on certain accounts. We also started holding monthly sales meetings based on a few reports generated from the HydraNet system. We'd distribute the report to the sales team and the most effective salesperson for the last month would explain to the rest of the sales team what he/she was doing to close more deals. **I attribute these HydraNet CRM-gx™ reports to marked improvements in our sales productivity.**"







System Requirements for CRM-gx™:

Client Environment	Min. System Requirements	Ideal System
CPU	Pentium II 500-MHz	Pentium III 1.0 GHz
Memory	128 MB	512 MB
OS	Windows 98	Windows 2000 or XP
Browser	Internet Explorer 4.0	Internet Explorer 6.0
Internet Connection	28k	1.2 Mbit/sec

Server Requirements (if hosted locally):

Server Side	Environment
OS	Security-Enhanced Linux
Platform	Intel, Itanium, or Athlon
Memory	2 GB
Database	Oracle or PostGreSQL
Web Server	Apache

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