



## Microsoft Dynamics Customer Solution Case Study



### Truck Dealer Gains Visibility into Sales Pipeline, Manages Growth with CRM

#### Overview

Country or Region: United States  
Industry: Transportation and logistics

#### Customer Profile

Rush Enterprises of New Braunfels, Texas, operates heavy-duty truck and heavy equipment dealerships across the United States. The company employs more than 2,000 people and had 2003 revenues of U.S.\$815.3 million.

#### Business Situation

A paper-bound sales process gave Rush management limited visibility into the sales pipeline. Executives had to spend hours on the phone managing sales without real-time access to sales data.

#### Solution

Rush deployed a customized version of Microsoft® CRM to provide data and workflow consistency for its sales process and insight into sales performance for its executives.

#### Benefits

- Better visibility into sales
- Increased efficiency and productivity
- Better ability to handle growth
- Standard but flexible process

“Microsoft CRM is making it much easier to maintain data and process consistency as we grow our business.”

Renee Garner, Enterprise Project Manager, Rush Enterprises

Rush Enterprises, which manages heavy-duty truck and construction equipment dealerships, was expanding rapidly and needed better insight into the 17,000 truck sales per year occurring at its more than 40 locations across the United States. The sales process was paper-based and nonstandardized, requiring a great deal of executives' time to keep up with daily sales information. With the help of Microsoft® Certified Business Solutions Partner Eureka e-Solutions of Austin, Texas, Rush implemented a customized version of Microsoft CRM (now part of Microsoft Dynamics™), a full-featured customer relationship management (CRM) application. The solution has helped give management insight into deals completed and in progress, increase the efficiency of salespeople and headquarters staff, and standardize the sales process across the company. All this helps Rush more easily manage growth.

## Situation

Founded in Houston, Texas, in 1965, Rush Enterprises operates a network of heavy-duty truck dealerships, heavy construction equipment dealerships, and farm and ranch superstores in the United States. Today based in New Braunfels, Texas, Rush is the leading supplier of trucks manufactured by Peterbilt Motors, accounting for more than 20 percent of all new Class 8 Peterbilt trucks sold in the United States in 2003. Total revenue in 2003 was U.S.\$815.3 million.

The company has expanded its number of locations by approximately 40 percent over the past five years, primarily through acquisitions, compounding an existing problem that the company had in gaining visibility into its sales pipeline. Rush has more than 40 truck sales locations from California to Florida and until recently had no computerized system allowing its more than 350 sales representatives, managers, and coordinators to enter and track quotes, deals in progress, and deals completed.

"Information about deals being forecast or just completed was not readily accessible to the management team," says Renee Garner, Enterprise Project Manager for Rush Enterprises. "The sales process was paper-based and nonstandardized, and current deals were not available online for executives who needed a better understanding of the business."

Each month, salespeople submitted Microsoft® Excel® spreadsheets that tracked gross revenues, gross profits, and sales commissions. Executives had the ability to view sales just 12 times a year, and it took a great many phone calls throughout the month to keep executives updated between spreadsheets. And because there was not a standardized methodology for collecting sales numbers, the spreadsheets contained inconsistent data and terminology, making it

difficult to get a single view of company performance.

Rush executives wanted to know such things as how many deals were in the pipeline at any point in time, what prices were being quoted, how quickly prospects were being converted to customers, and how individual salespeople were performing.

"We were generating mountains of paper for each sale without learning anything about the transaction," Garner says. "Because the information wasn't electronically accessible, we had no insight into the details of our deals, no ability to analyze and learn from trend data, and no corporate view of our customers and the impact each had on our revenues."

## Solution

Rush Enterprises wanted to move toward a comprehensive view of its customers, understanding what each customer was buying from Rush and where additional revenue opportunities lay. It also wanted to maximize the efforts of its sales force, automate the paper-bound sales process, and give managers all over the company instant access to up-to-date sales and forecast data. Rush realized that a robust customer relationship management (CRM) system could deliver such far-ranging capabilities.

### Search for Best CRM Solution

Rush exhaustively researched CRM applications, including ACT!, GoldMine, Siebel, Oncontact, and others. It even talked to its dealer business system vendor, which was creating a CRM-like module for its product, but the development timetable was too far out to suit Rush's needs. The dealer business system is essentially an enterprise resource management application specialized for the needs of truck dealers. It is the backbone business system at Rush, containing business-critical inventory and accounting data. However, it is a minicomputer-based

"green screen" application that does not have the data structure to store all the sales information that Rush wanted to access online.

Rush needed a sales management and reporting system that could accommodate the unique truck sales process, which involves more governmental forms, taxation information, and specification documentation than the automobile sales process. The solution needed to be robust enough to evolve into the comprehensive customer view that Rush envisioned. And it needed to be cost-effective.

Rush asked Microsoft Certified Business Solutions Partner Eureka e-Solutions of Austin, Texas, to propose a customized solution based on Microsoft CRM, a full-featured, modular solution targeted for companies seeking to automate and more tightly integrate their sales and customer service processes.

Rush was attracted to Microsoft CRM because of the dealer's already extensive use of Microsoft software on both server and desktop computers. "We really liked the seamless integration between Microsoft CRM, the Active Directory® service, and Microsoft Office programs such as the Outlook® messaging and collaboration client," Garner says. "Plus, the openness of the architecture meant that we would be able to plug in custom applications and downstream data from legacy applications." Garner also found that the price of Microsoft CRM was compelling, compared with alternative solutions.

**Customization for Unique Needs**  
Eureka e-Solutions specializes in CRM implementations and extensively customized Microsoft CRM to complement the unique workflow needs of the Rush sales organization. In addition to the core contact, lead,

opportunity, and account management functions of Microsoft CRM, Eureka developed modules for creating quotes, processing deals, and generating reports.

The **quote module** accesses customer identification data and plugs that information into an electronic quote form. Not only do the resultant quotes look much more polished and professional than previously created quotes, but all quotes contain the same information and are electronically accessible for management visibility into quote activity.

Once a customer accepts a quote and agrees to the terms of a sale, the salesperson uses the **close order module** to automate the process of finalizing the deal. Using standardized electronic forms and processes, this module converts the quote into a sales order, creates the needed governmental forms, and reaches into the inventory system for specific truck specifications and costs.

The **reporting module** allows employees at all levels of the company to tap the customized Microsoft CRM solution for a wide range of reports on sales activities. Reports generated through the reporting module have replaced monthly spreadsheets with far richer and more current data that is accessible at any time from any company desktop computer.

"Microsoft CRM is seamlessly tied to our customized deal system so that users don't even know that the application is pulling data from other systems," Garner says. "That kind of transparency is important to us. Ease of use was a number-one priority, and Eureka has done a wonderful job of creating an automated workflow within Microsoft CRM that very closely resembles the paper-based workflow previously used by salespeople."

Rush rolled out the solution in phases, but the consistent look and feel across modules made it easy to bring users up to speed on

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each new capability. "Our user training spends far more time on the new process steps than on teaching people how to use the software," Garner says. "Microsoft CRM is intuitive and easy to use."

#### Rapid Development

Eureka developed the custom Microsoft CRM modules using the Microsoft .NET Framework, an integral component of the Microsoft Windows® operating system that provides a programming model and runtime for Web services, Web applications, and smart client applications. The kernel of the reporting module is Microsoft SQL Server™ 2000 Reporting Services, a technology for easily creating reports from SQL Server 2000 databases.

Eureka used Web services to pull inventory and accounting data from the inventory system and communicate it to the electronic forms in Microsoft CRM. Web services are small, reusable building blocks written in XML that allow data to be communicated across the Internet between otherwise unconnected sources.

Developing custom extensions to Microsoft CRM using the .NET Framework went very quickly. Each of the three fully integrated modules required only 90 days of development. "It would have been 10 times the project on any other platform," says Rodney Muras, Vice President of Technology Solutions for Eureka e-Solutions. "Productivity within the Microsoft development environment tends to be quite a bit higher than that for other architectures."

Rush runs Microsoft CRM on two HP DL360 server computers: an application server running Microsoft CRM on the Microsoft Windows Server™ 2003 operating system, and a database server running Microsoft SQL Server 2000 on Windows Server 2003. Two additional server computers run the identical

software configuration and provide redundant backup. Windows Server 2003 and SQL Server 2000 are part of Microsoft Windows Server System™ integrated server software.

#### Benefits

The new CRM solution has given Rush Enterprises a foundation on which to build a comprehensive view of its customers and gain a solid understanding of the profitability impact and potential of each customer relationship. Salespeople have a standard, electronic method for creating quotes and documenting deals, and management has deep visibility into the company's "deal pool" at any point in time. By electronically capturing every detail about its sales process, Rush now has vast reservoirs of data that allow managers to analyze the business from every possible angle, something that wasn't possible in the paper-centric days. Furthermore, the company's current rapid growth is not requiring dramatic increases in administrative staff because of the efficiencies provided by Microsoft CRM.

#### Better Visibility into Sales

Although Microsoft CRM has been in production use at Rush for only a brief time, Garner expects it to revolutionize the way that the company learns about its customers. "Microsoft CRM will move us a long way toward having a 360-degree view of our customers," she says. "This will allow us to transform our business in ways we're only now beginning to consider."

Microsoft CRM is helping managers find answers to questions such as: Who are our customers? What are we selling them? What are the profit margins on various deals? Who are our best customers? Who are our worst?

"In the future, we want to integrate Microsoft CRM with our parts and service data so we can tell what kinds of revenue each customer generates," Garner says. For example, Rush

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would like to be able to break down revenue per customer by truck purchase, parts, body shop, engine repair, financing, and so forth. Executives would further like to see those numbers by sales representative, store, truck model, time frame, and other dimensions.

“We’re driving to a robust reporting structure that will allow us to analyze our business from any number of angles. Microsoft CRM allows us to capture a significant portion of data that didn’t exist a year ago,” Garner says. “Capturing every deal electronically for analysis is huge for us.”

**Increased Efficiency and Productivity**  
Rush salespeople find that they are often more efficient in creating quotes because of the new instant access to figures from past deals. “Our salespeople are now mining Microsoft CRM for historical data that can help them create more compelling quotes,” Garner says. “Our quotes and paperwork look better, are more accurate, and are easier to reference. Over time, we’ll develop a better sales force because of our ability to measure and analyze sales performance.”

From an administrative perspective, Microsoft CRM has eliminated the errors and illegibility that snarled the paper process. In the past, headquarters administrative staff frequently had to call salespeople to track down missing information. Now, Microsoft CRM requires that forms are filled out correctly before processing them. Not only does this save hours each month for both administrative staff and salespeople, but it also provides Rush with a great improvement in auditing and governmental compliance requirements.

**Better Ability to Handle Growth**  
The efficiency and productivity improvements are helping Rush handle tremendous business growth that otherwise might swamp the company or require expensive increases in

administrative staff. “Our business has expanded by approximately 40 percent over the last five years, which means a tremendous increase in paperwork,” Garner says. “With Microsoft CRM, we are able to systematize and automate the sales process across locations and relieve some of the administrative burden.”

Integrating newly acquired dealers or individual stores into the company is far easier with Microsoft CRM as the point of integration. “We set up new locations on Microsoft CRM very quickly, maybe add a few additional forms needed by particular states, and—boom—they’re ready to go,” Garner says. “Microsoft CRM is making it much easier to maintain data and process consistency as we grow our business.”

**Standard but Flexible Process**  
The CRM solution needed to be flexible enough to accommodate a variety of existing processes—allowing Rush to gradually create and enforce standardized processes. As a first step, Microsoft CRM has given Rush a set of standard forms for gathering data and a common vocabulary for describing measures and steps of the sales process. “Gross profits,” for example, now means the same thing across the company. “We’re all looking at the same set of numbers,” Garner says.

However, the Rush dealerships are still very entrepreneurial in the way they operate, and Microsoft CRM accommodates that individuality while still enforcing basic standardization. For example, in most Rush offices, salespeople are authorized to view only their own accounts. But in one region, the sales manager has authorized all salespeople to see all accounts in their region.

“This is an example of how Microsoft CRM allows us to run two very different sales models within the same system, one being very collaborative and the other very

## For More Information

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segmented," Garner says. "Over time, we'll tighten up best practices, but Microsoft CRM gives us huge latitude in accommodating the inevitable individuality that you get in a company growing as fast as ours."

## Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship and supply chain processes, Microsoft Dynamics brings together people, processes and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: [www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)



### Software and Services

- Microsoft Dynamics
  - Microsoft CRM
- Microsoft Windows Server System
  - Microsoft Windows Server 2003 Standard Edition
  - Microsoft SQL Server 2000
- Technologies
  - Microsoft .NET Framework
  - Microsoft SQL Server 2000 Reporting Services

### Hardware

- Two HP DL360 application and database server computers

### Partners

- Eureka e-Solutions

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