



CRM Helps With the Heavy Lifting for Movex

The self-service mover has improved its efficiency, profits, and customer satisfaction.

by [Stuart Suddath, CEO, as told to Phillip Britt](#)

- **Why CRM?**

In 2002 Movex had grown as large as possible with an off-the-shelf CRM solution. We were using ACT!, but once [we got] up to a certain number of leads, it got unstable, and it didn't handle the process. Synchronization of data had almost become a joke. Operations did not know what sales knew, and accounting was a whole other story. To grow, standardization of information and access to that information became a critical need.



- **How did the implementation unfold?**

On a referral we contacted Extremely Productive [EP], in Atlanta. We didn't know what our company needed. We had leads coming in, but we didn't have a set process for dealing with them. EP helped us build that process. Once the leads got in house, we didn't know what to do with them. EP asked us what we needed to do with information, then helped us answer that question. We spent two months with their professionals outlining the needs of our company.

EP developed customization of a SalesLogix platform that fit our needs perfectly. Because of their experience with consolidating business processes, the end result far exceeded our expectations and needs. The system helps us track all our shipments by status, loading dates, [and] delivery dates, depending on what the user (e.g., sales manager, accountant) needs to see. EP built the entire system, installed it, and tested it without ever coming to our office.

- **How did you get everyone on board?**

[When] we were ready to roll out the new platform, the old one was being held together with tape and bubble-gum wrappers, so we had to go "right now." EP worked with us to do an emergency installation. Everyone was ready to have real data shared across the company, and software that they could count on. In brazen entrepreneurial fashion we rolled out the entire program with little to no training. Chaos reigned as we retrained the entire company over the following two weeks.

SalesLogix looks like an SQL version of ACT!, so we had very few complaints. We found out very quickly what worked and what didn't. EP worked out any problems at night, so it didn't disrupt our work. They really did their homework.

- **What were the challenges?**

We had designed the system with EP with our process in mind, so the major challenge was really just figuring out all of the new bells and whistles. It was also expensive, but we told EP that and they worked out a payment plan that we could live with. We've had them do two or three other projects with us. We have a lot of confidence in their abilities.

- **What were the main rewards?**

We immediately increased productivity and accuracy across all sectors of our business. In the year that we implemented SalesLogix, we saw the largest [to date] year-to-year increase in sales [120 percent]. Our service satisfaction rates climbed to new heights, because we were able to accurately monitor a virtually unlimited number of customers. We survey all of the people that we move--the results of those surveys went off the charts.

The system prompts us to make sure we get all the right information to the right people at the right time. Before, we were walking file folders everywhere--now it's all electronic. Because of the ability to monitor the payment process of every order, we cut our uncollectibles to practically nothing. It was amazing.

- **What are your next steps?**

Now that the business has a platform to run on, our focus internally has shifted more from operations to sales. With SalesLogix we can grow from the \$13 million we did in 2004, to \$130 million without having to retool the entire system. That's our long-term [seven-year] plan. So the next step is to be the first, biggest, and best self-service mover in the country. We are well on our way.

Lessons Learned

- Get help from professional CRM builders. They can not only build your platform, but also bring all of the knowledge of countless other non-competing businesses to your table.
- Train, train, train your people to use the new software. Just because they were good with the old does not mean that they will be good with the new.
- Overkill is your friend. If you think you might need it, build it up front. It is a big pain to make changes to the platform once everyone is using it in real time.
- Test the system with real data. Work the new system side-by-side with your old until you are comfortable enough to leave the nest.
- Enthusiasm from management is the key to success. If management does not believe in the new system, the employees will not either. Make sure that the key people from each area of the business have input in how "their piece" will work.