



CASE STUDY

CSA Transportation lives up to its mission to become “shipper of choice” while keeping its small company feel.

CSA Transportation – IntelliClick Case Study, March 2014

“By integrating GoldMine CRM, our Truck Mate operations system and IntelliClick for email marketing, we now have a holistic business automation and communication system that is entirely driven by real time data, both transactional and behavioral. With the help of powerful email marketing features provided by IntelliClick, we can now communicate relevant updates and information that relates directly to our clients’ unique shipping needs. A Truck Mate CRM integration was key in ensuring that CSA continues to lead the way in personalized service and highly competitive freight pricing.”

Business Challenge: Enhance CSA personalized customer service approach to freight shipping as its’ Canada/USA freight shipping service continues to increase and their customer base continues to grow.

As recently as 2011, CSA’s Customer Relationship Management (CRM) GoldMine Premium Edition, email marketing and Truck Mate operations systems all contained critical business information that was stored separately. While GoldMine contained important information, such as phone calls, appointments and email; it lacked key details from Truck Mate like up to date customer profile information, sales dollars per account, and freight trip data by account. Email marketing, an important method for communicating with prospects and customers, was loosely targeted due to lack of being able to group pertinent contact data, transactional, and shipping information together in one platform.

Integrating these solutions together would go a long way with empowering the sales and marketing teams with providing prospects and customers with personalized and relevant product, pricing and available transportation information.

Business Solution: Integrate Operations and CRM systems as well as implement CRM integrated email marketing solution.

In the Fall of 2011, the marketing and sales executives from CSA contacted Business Automation Solutions, Inc., (BAS) a GoldMine CRM Partner and the developer of IntelliClick, the email marketing solution that tightly integrates with GoldMine. Their number one priority was to create a CRM system that contained critical business information that could be acted on. This involved coming up with a simple method for updating GoldMine with key profiling information from TruckMate, as well as transactional and shipping information.

Though custom programming to create this type integration can be financially prohibitive, BAS was able to use a variety of readily available software solutions that could reconcile and update contact data, revenue, quoting, transactional and shipping information between the two systems, without having to completely build a custom development solution for CSA.



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Business Benefit: Now data freely flows between the two systems on a daily basis, and the sales staff is able to view a holistic approach to customers and prospects, can analyze is report quickly, and most importantly, is able to provide timely and personalized customer service.

Since tying the two systems together, CSA has been further able to take advantage of personalized and highly targeted email marketing campaigns with IntelliClick. GoldMine CRM's premier click tracking email marketing solution uses custom built GoldMine Groups that can take advantage of the recently integrated historical customer data. In addition, it sends instant email alerts and schedules phone calls to the assigned sales teams to notify them of immediate opportunities.

The result is that sales reps have more immediate business revenue and customer information in their hands, and can respond quickly to new opportunities and close business in a timely fashion. The marketing team is successfully coordinating their campaigns to align with the sales departments; while providing important material to prospects and customers.

This all bodes well for a growing company who is working hard to maintain personalized service through their team of dedicated freight account managers.

CSA Transportation's Vision: Measure, Analyze & Act to continue to take advantage of systems integration to provide more personalized customer service.

The Marketing Team at CSA knows that things are greatly improved. For example, it's sales reps are happier with key information in their hands, based on their new ability to segment customers by transaction history. Email campaigns are now generating better quality leads, sales are growing year after year, higher email open and response rates are occurring, and; they are experiencing greater efficiencies in responding to customer requests. They plan to continue upon this success. CSA has a goal to further integrate and they look forward to continuing to improve and enhance their new and improved process.



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About CSA Transportation:

Founded in 1986, CSA Transportation is a freight shipping company providing freight transportation from a single pallet (LTL) up to a full truckload (TL) throughout Canada and the United States. A network of strategically located distribution centers, a goal for personalized service and highly competitive pricing gives CSA's clients the shipping coverage they need to keep supply chains moving, customers happy and freight costs low. Visit www.csatransportation.com or call 1.855.SHIP.CSA (744.7272) to learn more.

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About Business Automation Solutions, Inc.

Business Automation Solutions, Inc., the developer of the IntelliClick eMarketing software, is a sales, marketing and relationship technology solutions consulting firm, and CRM integration specialist. The firm integrates its' IntelliClick eMarketing application with well-known CRM solutions, such as ACT! & GoldMine. IntelliClick is marketed globally and customers span a variety of industries including financial services, human resources, manufacturing, software, marketing services, transportation, security services and broadcasting. Business Automation Solutions is headquartered in Chicago, IL. For more information, visit www.intelliclicksoftware.com or call 888-827-5628.