



## ➤ A smooth ride to CRM for Heppner

### Transport/Logistics

In the world of logistics and transport, Heppner is content to see itself as 'a David among Goliaths'. It was founded in 1925 and now has a workforce of 3,700 people. 2006 turnover was €550 million. The July 2004 acquisition of XP France gave Heppner a new national and international dimension.

The company now boasts a multi-business offering covering national and international delivery service, national and international freight transport, logistics and sea and airfreight forwarding. The group's rapid expansion demanded not only a new organisation, but an upgraded information system.

#### ➤ A dual need

Xavier Prud'homme, Heppner CIO, recalls the situation at the time. "Heppner already had a customer relationship management tool – it was a stand-alone application completely independent of the other business software systems. Moreover, XP France had its own tool, too. To manage all our business lines consistently, we had to consolidate all available data and introduce a centralised solution meeting two needs – on the one hand, overall management of customer relationships, and on the other, monitoring the activity of the field force."

So the company launched a selection process for a CRM software system. A dozen developers responded to the specifications defined late 2005 and three were asked to pitch their functional and technical solutions. At the end of 2005, Heppner opted for Selligent. The decision was based on the fact that Selligent met the functional requirements of the Sales and Marketing departments as well as satisfying the technology demands expressed by Prud'homme. "I wanted a fully Web-based solution using the latest

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Installing Selligent should **improve customer loyalty** even more.



Xavier Prud'homme | CIO

technologies to enable all the users, be they mobile or office-based, to access a central database. The software also had to integrate seamlessly with the other bricks of the information system because it was out of the question that we have a CRM tool disconnected from the rest of the applications." Prud'homme readily admits that he was also attracted by the ability to deal directly with Selligent during implementation.

# A smooth ride to CRM for Heppner

A project team was set up. It was made up of a dedicated IT project manager, a functional project manager from field sales and business line users. The project, dubbed Octave (Outil pour le Commercial Terrain et l'Administration des Ventes – tool for the field sales force and sales administration), was launched, and a pilot version covering the full functional scope was up and running by November 2006.



The company has over 180 000 sqm of logistics warehousing space

## ➤ Octave simplifies client account management

Prud'homme knows from experience that a CRM system, however advanced, can only deliver the desired results if it is based on a single depository for the whole group and for all business lines. "A customer must be tagged only once, with an unambiguous identifier, so that it can be found easily in all software systems of the group. With Selligent, we redefined the client account management process. Once a prospect becomes a customer, Sales Admin sends the information to Credit Management. The first thing they do is to check that it is indeed a new customer. Only after this verification has been carried out is a new client account created. Then the corresponding client code is sent to all the other business tools. This means there is a single customer ID, whatever software is used. On the other hand, if the customer already exists, its client code is sent to the sales rep." This mechanism has already rationalised and simplified client account management considerably.

Heppner now has a full picture on each customer, complete with operational organisation and its ramifications. The group can now carry out statistical analyses of a given customer and the organisation it belongs to.

## ➤ A harmonised customer relationship

The single customer identification has led Heppner to understand its clients better and to assign a sales representative to each of them to nourish the relationship. "This implies that each sales rep now has to represent the whole group and its complete range of offerings. Even if he or she is not a specialist in all the business lines we cover, all reps have to be able to propose all our services to the client," Prud'homme points out.

Heppner is confident it can stand out in a very competitive market thanks to a personalised customer relationship and a tailored approach, in combination with quality services. And installing Selligent should allow them to improve customer loyalty even more.



## ➤ Mobility and security

A centralised database is one thing. But it has to be accessible to all the users, internally via the intranet and for the field staff via a secure extranet. That is why a 'mobility' chapter has been grafted onto the CRM project. All sales representatives have been equipped with 3G+ cards and laptops so that they can access the customer database wherever they are. Each person can consult the data and update them in real time. But, for reasons of security, they cannot extract all or part of the database and save it on their laptops.

## ➤ Data gathering – a delicate operation

Production roll-out of Octave to the group's hundred or so sites started in January 2007. Completion is planned for May, because the group decided to roll out region by region. Heppner's biggest concern is to retrieve the data that are currently located inside different tools.

"Each time we roll out the solution in another region, we have the problem of retrieving the data. It's a complex process because of the many redundancies and different formats. But our customer depository is taking shape bit by bit," notes Prud'homme.

Selligent met its **schedule and budget commitments.** In my opinion, the project roll-out process should serve as a **model for all future projects.** Octave really is a **joint success.**



Xavier Prud'homme | CIO



Over 25 million parcels are sent per year in France, and over one million per year in Europe.

## ➤ New horizons

Around a hundred Heppner sites in France will soon be equipped with the solution and all data will be consolidated. So at last Heppner will have a single, Selligent-managed customer depository that will feed into all the other tools.

The company will then be able to add a Marketing module so as to develop and monitor targeted marketing campaigns and measure the gains in productivity, quality and customer loyalty.



The group handles more than 140 000 tons of freight per year



### ➤ An exemplary project

Today, the sales representatives are very satisfied with the solution's functional and technical features. They had been waiting a long time for a tool that enables them to manage their work efficiently, so user adoption was immediate, especially since the users themselves were involved in every phase of the project, starting with writing the specifications. And thanks to the dashboards, management now has a real-time overview of activities from different perspectives – group-wide, branch, region or business line.

As for Prud'homme, he is very happy about the progress of the project: "We didn't come up against any particular problem. Selligent met its schedule and budget commitments. In my opinion, the project roll-out process should serve as a model for all future projects – the involvement of all concerned people from the outset, effective co-operation between project management and project owners, implementing a pilot followed by a production system once the pilot was working properly." And he adds, "I would like to congratulate all the teams that contributed to the project: Sales, Marketing and IS, as well as the Selligent team. Octave really is a joint success."

### ➤ About Selligent

Selligent, the European leader in interactive marketing and Customer Relationship Management, has been developing and marketing since 1990 operational, collaborative and analytical solutions aimed at boosting the organization, actions, and interactive communications of teams in direct contact with customers, prospects, and business relationships. Selligent solutions enable marketing, sales, services and consulting departments to develop interactive, effective, and sustainable relationships with all their contacts and ecosystems. Selligent offers a unique approach combining agility, pragmatism, and engagement, and guarantees its customers a fast and significant return on their investment.

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