

C.H. Robinson solves logistics problems with HCLTech's help

A customer success story



C.H. Robinson partners with HCLTech to implement Microsoft Business Applications

C.H. Robinson solves logistics problems – from the simplest to the most complex – for companies around the globe and across industries. They are one of the world’s largest logistics platforms, with nearly

\$21 B In freight under management

\$19 M Shipments annually

105 K Customers

73 K Contract carriers

The challenge

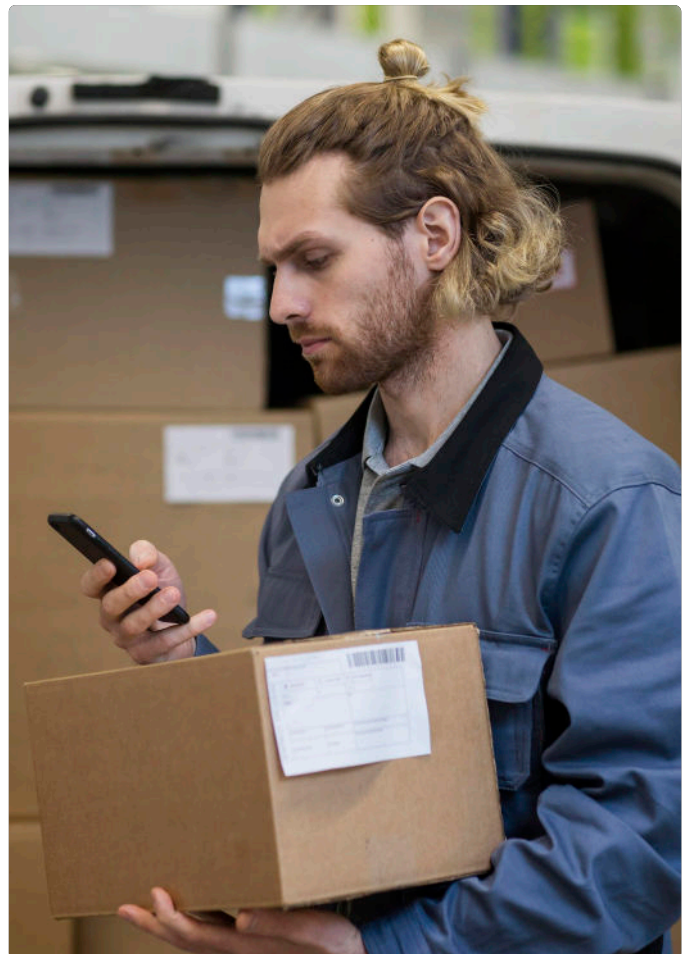
Lack of a central repository for customer information

C.H. Robinson’s customer-facing sales team needed a central repository in which to collect and catalog each customer’s pain points, needs, issues and challenges, as well as the specifics of what C.H. Robinson can do to help. They sought to invest in a sales-focused technology solution to streamline several separate systems, as well as enable the full integration of their customer-centric philosophy throughout their sales organization.

The objective

End-to-end digital transformation with Microsoft Business Applications

C.H. Robinson selected HCLTech to implement Dynamics 365 Sales, including Power Apps and Power BI solutions. The partnership with HCLTech for implementation and delivery of their future-ready technology transformation would begin with a commitment to training, change management and successful user adoption. From there, it would involve a carefully coordinated rollout of Dynamics 365 Sales to nearly 3,000 employees, as well as a Power Apps solution and a series of Power BI reports that bring to life the data they are collecting.



The solution

Success is defined upfront

Before any contracts were even signed, Microsoft and HCLTech conducted a complete Business Value Assessment (BVA) to showcase the reality of what this investment could do for C.H. Robinson.

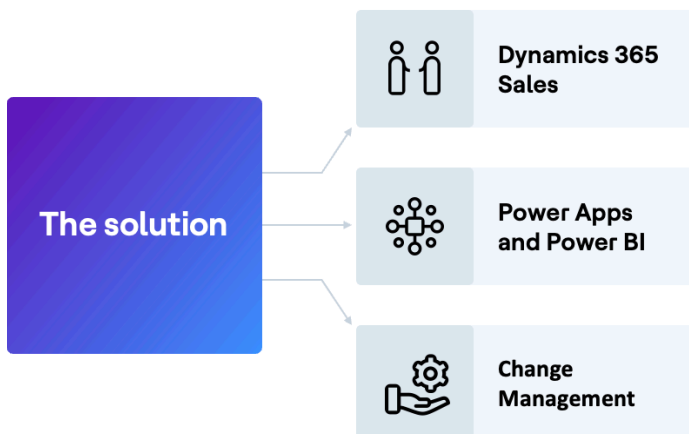


Microsoft and HCLTech spent roughly three months with us shoulder to shoulder digging down into what our processes were, what our people were doing, and helping us assess the value that Dynamics 365 was going to create inside of our business.”

James Santy, Vice President of Sales Operations, C.H. Robinson.

In so doing, we were able to quickly evolve from anecdotal suggestions that this could benefit their business to having actual numbers and the ability to articulate real expected benefits. Without the BVA, says Santy, “We wouldn’t have received buy-in from all the business units to get this technology. So, it really helped us give voice to the business value and the business case by division and then aggregate that across our company to see the incremental improvements that Dynamics 365 could help us make.”

As the team evolved the implementation plan, the project team facilitated day-long seminars with leadership and end-users alike to determine where they needed to devote the most training time from a change management and user adoption perspective. “We worked closely with HCLTech,” says Jennifer Stocco, Director of CRM at C.H. Robinson, “to put together the full implementation plan. Through the workshops, we identified which functionality would have the biggest impact on the users so that we could be sure to include those items in the initial go-live.”



Part 1: Dynamics 365 Sales

A significant factor in C.H. Robinson’s successful rollout was the commitment from the senior leadership team. “We had leadership buy-in from senior leadership to sales executives on how important this was,” says Stocco. “Every level of manager attended the same training, so everyone had the same level of base knowledge and strategy for using the system.”

Dynamics 365 Sales enabled C.H. Robinson to begin building stronger client relationships – and more sales – by delivering a consistently personalized customer experience. The sales team, says Stocco, “is spending less time finding leads and more time with the customer. Dynamics has given us the gift of time to spend with our customers and prospects.”



Part 2: Power Apps and Power BI

As part of the digital transformation initiative, HCLTech built a tool in Power Apps that sits inside of Dynamics – and can also be used as a standalone app; it empowers the salesperson to focus completely on the customer while also collecting data and information vital to creating holistic solutions that meet each customer’s needs.

Launched into production midyear 2019, the Power Apps solution is deployed to all 2,700 salespeople. User adoption has been tremendous, as the app is launched nearly 500 times daily with 14,000+ qualification activities – including key data like objectives and current pain points – captured in its first six months.

Just as important as giving the sales team the ability to easily capture such data is providing them with a tool to surface it in a meaningful and actionable way. So, the project team designed and built a Power BI report called Wallet Share to do just that. Ultimately, with Dynamics 365 Sales and Power Apps working in tandem, Santy reports that “we’ve been able to decrease salespeople’s time spent trying to find leads by actually digitizing that experience and connecting other things through Dynamics. It’s allowed us to return a ton of time and efficiency to our sales force.”

(Part 2 continued)

Since the launch of Wallet Share, C.H. Robinson has improved data collection and tapped into new data. And equally critical is all the "bad data" they have now been able to eliminate from their system.

Going back to the BVA discussed earlier, the project team also built a Power BI dashboard to track the KPIs identified as measures of success during that process, including perhaps the most important metric, Return on Investment (ROI). From day 1 of the project, the dashboard provided the executive leadership team with a line of sight into the financial impact of their investment in Dynamics 365. By shining a consistent light on the BVA data, C.H. Robinson identified that from an ROI perspective, the project broke even after just 11 months – not the 18-month period they initially targeted.

Part 3: Power Apps and Power BI

Guided by HCLTech, C.H. Robinson made a significant investment in a program to increase adoption and sustain high usage levels. After all, while they were investing in Dynamics 365 and Microsoft Power Platform, they were likewise investing in the behavioral changes their employees would need to make for the system to yield a return.



This was going to be a large change from a technology and process standpoint for our organization. It was critically important that everybody bought in. This was not something where we could tell our staff to just *start using it.*"

Jennifer Stocco, Director of CRM
C.H. Robinson

The next step in planning the training was ensuring the same end users precisely understand the ways in which the new technology will help them. Adds Stocco, "We really wanted to gain their trust and understanding in terms of why this tool was going to help them do their jobs better and make them more efficient. So really selling the tool to them as part of change management was critical."

A truly effective change management program honors the culture of the company. It is one thing to give end users a say in the process and show how their lives will be improved, but it's another thing altogether to be able to deliver that critical message through the lens of the values, traditions and habits of the organization. This is where HCLTech particularly excels.

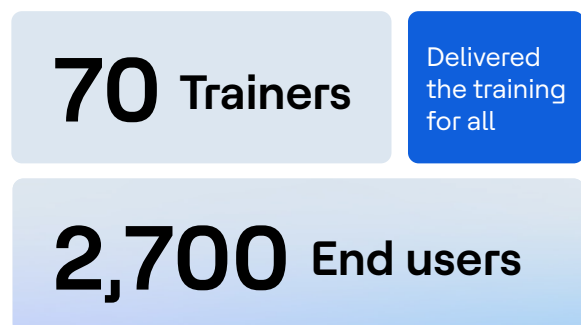


C.H. Robinson operates on four customer promise pillars that guide their business and are part of the company's DNA:



Their goal was to weave these four pillars into all aspects of the project to ensure their messaging resonated with all employees. HCLTech delivered, according to Santy. "They understood our business. They understood our culture. It was just obvious from the very beginning that they were the right partner for this project."

When it came time to deliver the training, HCLTech recommended a train-the-trainer approach in which approximately 70 C.H. Robinson employees – mainly members of the leadership team to help promote user adoption – were trained by HCLTech's Organizational Change Management Team.



The impact

Making C.H. Robinson a great customer-centric organization



Implementing Dynamics 365 Sales, a Power Apps solution and several Power BI dashboards has had a giant impact on C.H. Robinson sales operation:



Significant reduction in time spent searching for leads



11-month ROI break-even point (when 18 months was targeted)



500 daily launches of the Wallet Share app



14,000 qualification activities in just the first 6 months

But there is certainly more to evaluating success than just metrics and KPIs. Perhaps the most important measure of success is the firm establishment of a customer-centric culture.



Our biggest accomplishment in this entire project, is that we now spend more time with our clients. The system has enabled us to spend more time with them, listening and understanding their needs and then coming back to them with tailored solutions. That's the true benefit this technology transformation is driving."

Jennifer Stocco, Director of CRM
C.H. Robinson

The future is full of exciting possibilities, with lots of opportunities ahead

Chris O'Brien, Chief Operating Officer at C.H. Robinson, summarized the energy they're feeling.



When I look across this broad relationship with Microsoft and HCLTech – and all the things we're thinking about, the future of the cloud, the future of AI, the things that we can pull back into Dynamics – these are really going to change the lives of our sales force and make us a better company to sell for and a better company to buy from."

HCLTech | Supercharging Progress™

HCLTech is a global technology company, home to 211,000+ people across 52 countries, delivering industry-leading capabilities centered around Digital, Engineering and Cloud powered by a broad portfolio of technology services and software. The company generated consolidated revenues of \$11.79 billion over the 12 months ended June 30, 2022. To learn how we can supercharge progress for you, visit hcltech.com.

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