

Estes Express Lines drives growth with customer service

Creating a 360-degree view of the customer in Salesforce identifies new opportunities

When W.W. Estes founded Estes Express Lines in 1931, he prided himself on superior customer service. Estes is now the largest privately owned freight-shipping company in North America, providing reliable solutions to customers for nearly 90 years with a robust transportation network, a reputation for dependability, and an award-winning safety record.

As an asset-based provider of freight-transportation and custom-logistics solutions, Estes manages a fleet of more than 7,000 tractors and 30,000 trailers, as well as a network of nearly 265 terminals. The family-owned company has both the

skill and resources necessary to stay nimble and responsive to ever-changing shipping needs.

The industry was experiencing disruption even before the pandemic. Customers wanted information in real-time on their shipments and expected Estes to have the technology to provide it. Once parts of the country started to lock down, Estes experienced an increased desire for final-mile and less-than-truckload (LTL) services, so it has now added delivery to customer's homes.



We got a great partner with Capgemini. You need to be able to trust your implementation partner's guidance. For example, our expectations of the app-exchange product were not accurate and Capgemini realized early on that was a risk, and pushed us to identify that risk and make decisions early because it was more complicated than we originally thought.

Carrie Johnstone
Director, Customer Engagement
Estes Express Lines



Responding to customer demands

The increased need to deliver accurate information to customers required system improvements, as too often service agents were unable to track who was calling or identify the issue.

“We did not have a line of sight into if a customer called us in the morning in Richmond and then called another terminal in the afternoon,” says Carrie Johnstone, Director, Customer Engagement, Estes Express Lines.

“Our system didn’t allow us to see they were calling about the same issue as in the morning. We did not have the information we or our customers needed, and this did not allow us to engage in a more personal way.”

Estes Express Lines decided to introduce the Salesforce Customer Relationship Management (CRM) tool to connect customers to the business, no matter how they contacted the company. And it relied on Capgemini to implement it across the company.

Harnessing the power of Salesforce

“We were really impressed with the Capgemini team, as they really understood the delicate balance we had of wanting to integrate the product with a rather aggressive, fast-paced implementation timeframe. We had very good conversations around our business needs and what Salesforce could and could not do. These very real conversations early on meant we ended up with the best product for everyone.”

Salesforce is designed to give every department, including marketing, sales, and customer service, a shared view of customers in one integrated CRM platform.

“Before, customers would reach out to us and be asked to call back later if we didn’t have the information. It was not an ideal process,” she explains. “But now, with our case-management tool, we are able to track contacts and know what our customers are calling about. And we have the ability to proactively reach out to them to see how we can provide better service or expand our work together.”



We went into the COVID lockdown about a month into our Salesforce implementation, so we were all remote and doing WebEx meetings. Capgemini really drove the team together and had the expectation that we would all be on-camera during our WebEx meetings. It meant we probably got to know our teams better than had we been in a room. They really led us through some grueling months of online meetings, but it was worth it.

Carrie Johnstone
Director, Customer Engagement
Estes Express Lines



The power of pilots

Capgemini recommended doing two pilots, one with the inside sales team and the other with the customer-service email team. The goal was improved decision making. The pilots allowed Estes to visualize the platform and see how Salesforce actually performed. The team could see the functionality around the single pane of glass with customers and the integrations needed to really make it work.

Johnstone added: “We got to see the ROI early and having that hands-on experience in the tool helped us all understand it better, so that we all got a better product in the end. It was a great recommendation by Capgemini.”

Estes has 75 customer-service employees using Salesforce remotely with a long-term plan to roll it out to 600 additional employees to expand its customer service. This is in addition to the 400 account managers and 50 supporting roles at corporate headquarters. The marketing team is also

leveraging the Pardot platform to generate leads and support marketing initiatives.

“From a sales perspective, we wanted to take leads and move them to opportunities and then be able to review them and turn them into customers who all experience an easy and consistent onboarding process. A better onboarding process means we move a lot less paper around now.”

Now, no matter how a customer contacts Estes, the employee can start more personalized conversations and often offer proactive customer service.

“By connecting through sales, service, and marketing, our account managers now have the ability to know what their customers are calling us about and they will never walk into a sales call or a Zoom meeting without information on any issues or concerns.”

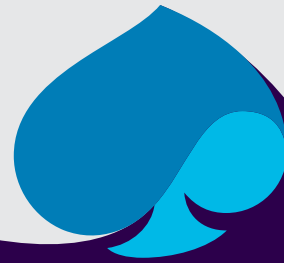
Customer service continues to drive growth

“It is essential for IT and the business to be aligned to make sure we time the business enhancements to when IT can support those goals,” she says. “I also think there is a really big responsibility for the business to understand the systems, so we can request the best IT options, manage expectations, and enjoy the best overall product.”

Estes is already seeing improvements in its customer service. The handle time for some categories of customer calls have decreased and the company is looking for more Salesforce productivity opportunities.

“I am always planning what’s on the horizon and looking at functionality. I am really excited about an asynchronous chat bot and the opportunities it can bring. By combining people and chat bots, we can provide an even better experience for our customers to interact with us when and where they want, through whatever platform they want.”

With Salesforce powering its CRM, Estes is better positioned to manage market disruptions and find opportunities for growth while continuing the tradition of delivering superior customer service.



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