

Microsoft Dynamics CRM
User Group (CRMUG®)

Regional Chapters

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 **CRMUG**®
Regional Chapters





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PROJECT MANAGER



CSX Overview

- Headquartered in Jacksonville, Florida
- Serves all major markets in the eastern United States with more ports than any other railroad
- Transports over 7 million carloads per year
- Covers 21,000+ route miles in 23 states, the District of Columbia, and two Canadian Provinces
- 32,000+ employees
- 2011 Revenue - \$11.7 Billion



Dynamics CRM Implementation Overview

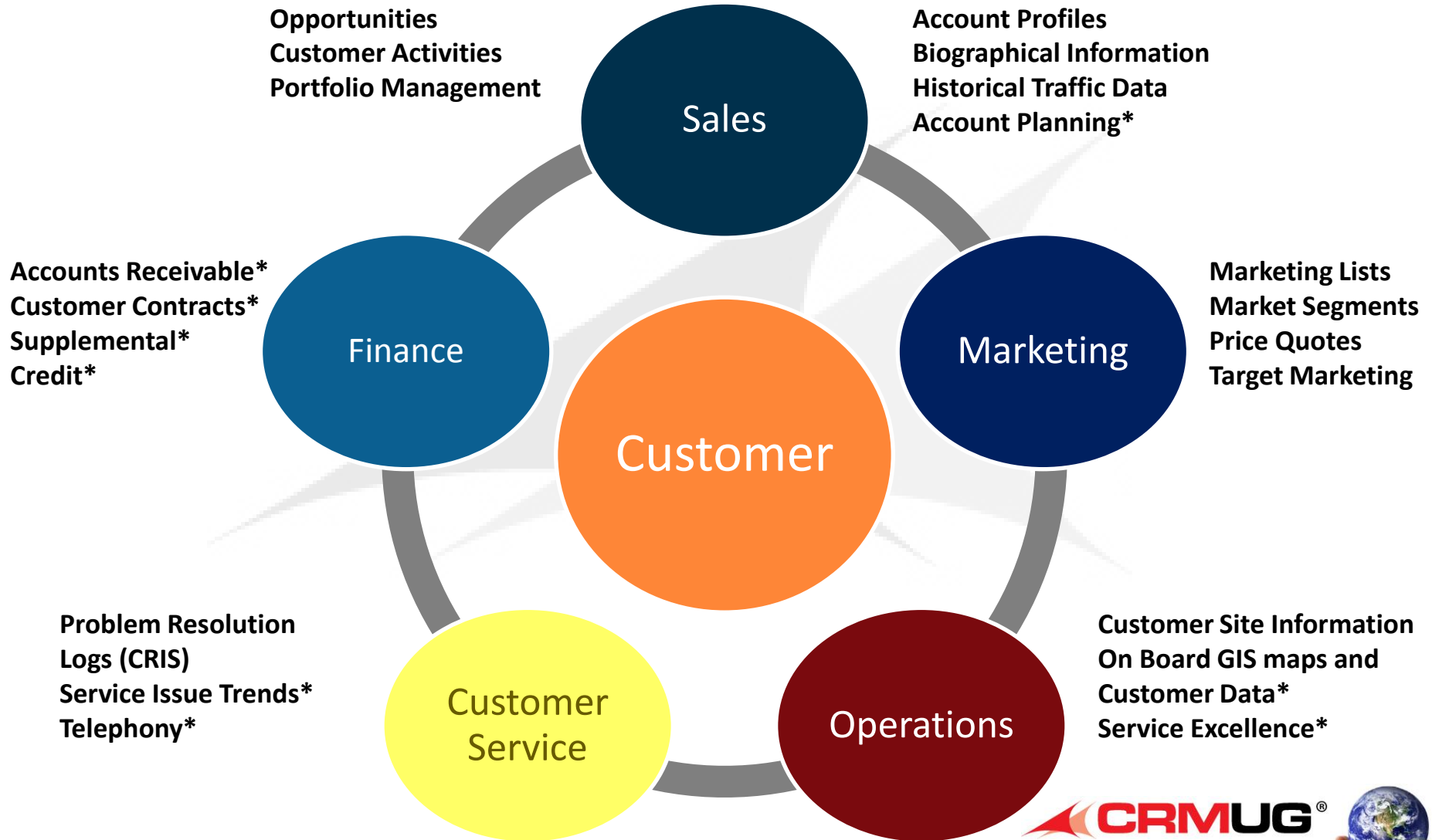
- 2011 On-premise
- 1,300+ enabled users
- 5 year project
- Team of 14 employees
 - 6 business
 - 4 tech
 - 4 consultants
 - offshore testing team
- Customer Effective



CSX won 2011
Microsoft Customer
Excellence Award in
Building Customer
Relationships!



CSX Implementation Roadmap



* Future enhancement



Business Problem

How to visualize data?

Accounts/Customers: **Search Results**

	Acct/...	Acct/Cust Name	Addr: Street	Addr: City	Addr: ...	Locati...	Manager
<input type="checkbox"/>	<input type="checkbox"/>	Accou...	General Motors Corp - IMOD - BCO	30001 van dyke ...	Warren	MI	
<input type="checkbox"/>	<input type="checkbox"/>	Accou...	GENERAL MOTORS CORP				
<input type="checkbox"/>	<input type="checkbox"/>	Accou...	GENERAL MOTORS CORP - Coke				
<input type="checkbox"/>	<input type="checkbox"/>	Custo...	GENERAL MOTORS DE MEXICO				
<input type="checkbox"/>	<input type="checkbox"/>	Custo...	GENERAL MOTORS CORP				
<input type="checkbox"/>	<input type="checkbox"/>	Custo...	GENERAL MOTORS ACCEPTANCE C...	3044 W GRAND ...	DETROIT	MI	
<input type="checkbox"/>	<input type="checkbox"/>	Custo...	GENERAL MOTORS OF CANADA LTD	1908 COLONEL ...	OSHAWA	ON	
<input type="checkbox"/>	<input type="checkbox"/>	Custo...	GENERAL MOTORS HOLDINGS LLC	300 RENAISSAN...	DETROIT	MI	
<input type="checkbox"/>	<input type="checkbox"/>	Locati...	GENERAL MOTORS CORP	Auto Ramp	Alliance	TX	Local ...
<input type="checkbox"/>	<input type="checkbox"/>	Locati...	GENERAL MOTORS CORP	Auto Ramp	Minneapolis	MN	Local ...
<input type="checkbox"/>	<input type="checkbox"/>	Locati...	GENERAL MOTORS CORP	AUTO RAMP	REGINA	SK	Local ...
<input type="checkbox"/>	<input type="checkbox"/>	Locati...	GENERAL MOTORS CORP	AUTO RAMP	CENTREVILLE	IL	Local ...
<input type="checkbox"/>	<input type="checkbox"/>	Locati...	GENERAL MOTORS CORP	SERVICE PARTS	MORRISVILLE	PA	Local ...
<input type="checkbox"/>	<input type="checkbox"/>	Locati...	GENERAL MOTORS CORP	AUTO RAMP	WEST CHICAGO	IL	Local ...

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All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Click here to view the chart.



Solution

Visual Hierarchy

The screenshot displays a CRM interface with three main sections: Accounts, Customers, and Locations. The Accounts section shows a hierarchy starting with 'General Motors Company (Corp Summary)', which includes 'GENERAL MOTORS CORP', 'General Motors Corp - IMOD - BCO', and 'GENERAL MOTORS CORP - Coke'. A 'CRM Details' window is open for 'GENERAL MOTORS CORP', showing a table with columns for Account/Traffic View, Volume (CY YTD, PY YTD, PY Total), and Revenue* (CY YTD, PY YTD, PY Total). The Customers section, titled 'Associated Customers/Subsidiaries', lists 'GENERAL MOTORS CORP' (134 Location(s)), 'GENERAL MOTORS DE MEXICO' (8 Location(s)), 'GENERAL MOTORS OF CANADA LTD' (13 Location(s)), and 'SATURN CORP' (1 Location(s)). The Locations section lists specific locations for 'GENERAL MOTORS DE MEXICO' and 'SATURN CORP'. The locations for 'GENERAL MOTORS DE MEXICO' are: CU RAMOS ARIZPE, CU RAMOS ARIZPE, CU ROJAS, DF MEXICO CITY, EM TOLUCA, GJ SILAO, GJ SILAO, and SL SAN LUIS POTOSI. The location for 'SATURN CORP' is TN SPRING HILL.

Accounts

- General Motors Company (Corp Summary)
 - GENERAL MOTORS CORP
 - General Motors Corp - IMOD - BCO
 - GENERAL MOTORS CORP - Coke

CRM Details

GENERAL MOTORS CORP

Account/Traffic View	Volume			Revenue*		
	CY YTD	PY YTD	PY Total	CY YTD	PY YTD	PY Total
Sales Main View						
Freight Payer						
Shipper Receiver						

*Revenue in thousands

Customers Expand all | Collapse All

Associated Customers/Subsidiaries

- GENERAL MOTORS CORP
134 Location(s)
- GENERAL MOTORS DE MEXICO
8 Location(s)
- GENERAL MOTORS OF CANADA LTD
13 Location(s)
- SATURN CORP
1 Location(s)

Locations

- GENERAL MOTORS DE MEXICO | CU RAMOS ARIZPE
- GENERAL MOTORS DE MEXICO | CU RAMOS ARIZPE
- GENERAL MOTORS DE MEXICO | CU ROJAS
- GENERAL MOTORS DE MEXICO | DF MEXICO CITY
- GENERAL MOTORS DE MEXICO | EM TOLUCA
- GENERAL MOTORS DE MEXICO | GJ SILAO
- GENERAL MOTORS DE MEXICO | GJ SILAO
- GENERAL MOTORS DE MEXICO | SL SAN LUIS POTOSI
- SATURN CORP | TN SPRING HILL



Implementation

- Process management is done via HP's Quality Center
- Multiple design iterations with our CRM user team
- Sneak peaks during formal training sessions for user feedback
- Scheduled to be released to end users at the end of this year



Lessons Learned

- Do your homework
- Recognize the need for a Partner
- Process to address data quality
- Document any updates/changes to the original requirement very thoroughly
- Have a well thought out, executable strategy for knowledge management



Q&A

CSX

How tomorrow moves

TM

