

Hi-Way Equipment

Hi-Way Equipment Company Dumps Spreadsheets
For SugarCRM® On IBM® SmartCloud®



Highland Solutions' Customizations and ERP Integration Streamline Sales Process

Hi-Way Equipment Company operates eleven equipment sales, rental, and service facilities throughout east Texas. The company chose SugarCRM and worked with Sugar Partner Highland Solutions to improve the tracking of weekly sales activity and eliminate reliance on spreadsheets, email, and handwritten notes. Hi-Way's Sugar solution has streamlined the sales process from quote to closing via improved call processing, reporting and forecasting. Highland integrated the company's ERP system with Sugar, which enables sale reps to pull their own inventory to complete deals.

Business Challenges

Following a model similar to auto dealerships, Hi-Way Equipment Company represents eleven manufacturers and competes with companies like John Deere and Caterpillar in the heavy equipment sales, rental, parts, and service business. It interacts with customers face-to-face at its dealerships or over the phone. To track weekly sales activity, the company relied on Excel spreadsheets or handwritten notes. "If we didn't put everything together as far as who was calling in or who was showing up, we had no idea what our sale people were doing," recalls Jason Olenik, director of IT and operations for Hi-Way.

To bring discipline and standardization to its sales efforts, Hi-Way began to evaluate CRM solutions, considering Salesforce, Microsoft, and SugarCRM. "We wanted a hosted solution we could grow with that was easy to use and flexible," Olenik explains. "And we were also looking for something that wouldn't require a big upfront investment." Hi-Way wanted to "test the waters" with CRM and see what kind of user adoption it could get from the sales force.

The Solution: Sugar Professional on IBM SmartCloud

Sugar met all of Hi-Way's requirements and the company selected Sugar partner Highland Solutions to design and implement its Sugar solution. "Highland has been great," Olenik continues. "They listened to what we needed, developed a scope and a timeline for implementation; and they were spot on with both of them." Hi-Way began with an implementation of Community Edition hosted on Highland's cloud, soon moved to Sugar Professional, and, on Highland's recommendation, migrated its Sugar solution to IBM's SmartCloud.

Highland integrated Sugar with Hi-Way's ERP solution to provide current inventory and revenue information, and developed a custom quoting module to enable sales reps to create quotes in Sugar rather than in Microsoft Excel or Word. "We have 32 sales reps," notes Olenik. "That used to mean about 27 different formats for quotes.

“ Using Sugar, we know exactly what stage an opportunity is in, when a deal is supposed to close, and what our revenue and margins will be. This has really improved our overall sales efficiency. ”

Jason Olenik
Director of IT and Operations
Hi-Way Equipment Company

The quoting module has allowed us to standardize the way we do business across all eleven of our locations.”

Business Benefits

Across Hi-Way’s operations, Sugar has had a substantial impact. The solution has streamlined the sales process from quote to closing, improved call processing and reporting, and enabled more accurate sales forecasts. “Using Sugar, we know exactly what stage an opportunity is in, when a deal is supposed to close, and what our revenue and margins will be,” Olenik says. “We pull a forecast report out of Sugar every week. This has really improved our overall sales efficiency.”

Since implementing Sugar, Hi-Way has introduced a daily calling requirement for sales reps. “Our reps need to make nine calls per day and report those calls in Sugar,” notes Olenik. “We can extract that information and see the kind of activity we’re getting out of our reps and our branches.” In addition, Highland’s integration of Sugar with Hi-Way’s ERP system gives sales reps visibility into inventory for all company locations. “The ERP integration updates inventory daily,” observes Olenik. “So now sales reps can pull their own inventory, which really got them to buy into Sugar.” Besides the sales reps, Hi-Way’s customer service agents, branch managers, upper level management, and accounting staff also use Sugar.

“In the future, I’d love to use Sugar to do some territory mapping,” concludes Olenik, “We have eleven locations and 32 sales reps so trying to manage our territories is a challenge. We want to use Sugar to incorporate our net promoter score customer satisfaction surveys. I want to use Sugar as one system for everything.”

About Hi-Way Equipment Company

Hi-Way Equipment has been selling, servicing and renting heavy machinery since 1948. The company has eleven locations throughout eastern Texas. Manufacturers represented by Hi-Way Equipment include: Case Construction, Case IH, Gradall, Kawasaki, Pettibone, LeeBoy, Rosco, Wirtgen, Hamm, Vögele, and Vacall. For our full line please visit www.hiwayequip.com.

About Highland Solutions

Highland Solutions assesses and solves business issues using technology as our tool for companies of all sizes. With a focus on creating effective business systems, we address a wide range of business needs including CRM, e-commerce, social CRM, collaboration, business intelligence, custom application development and cloud strategies. Our experience customizing and integrating SugarCRM solutions means your CRM system can always meet your evolving needs. In business for over 12 years, Highland Solutions delivers consistency and expertise over the long term.



Company Profile

Headquarters: Houston, Texas

Founded: 1948

Company Description: Hi-Way Equipment Company sells, rents, and provides parts and service for heavy machinery from eleven locations throughout eastern Texas.

Website: www.hiwayequip.com

Solution: Sugar Professional on IBM SmartCloud

Solution Partner: Highland Solutions

SugarCRM

Customer relationship management (CRM) software for business. In the cloud, online, on-demand, or on-site—the best sales, email, and mobile CRM integration.

www.sugarcrm.com

10050 North Wolfe Road | SW2-130
Cupertino, CA 95014
T: 408.454.6900 | F: 408.873.2872

SugarCRM Deutschland GmbH
Erika-Mann-Strasse 53 | 80636 Munich | Germany
T: +49 (0)89.18.91.72.0 | F: +49 (0)89.18.91.72.150

www.sugarcrm.com

Copyright © 2012 SugarCRM, Inc.
All rights reserved. SugarCRM and the SugarCRM logo are registered trademarks of SugarCRM, Inc. in the United States, the European Union and other countries. All other trademarks are the properties of their respective companies.

04-12-051

