

## Case Study

# DX EXCHANGE



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*Jonathan Rawsey*  
DX EXCHANGE

## WHO IS DX Exchange?

First established in 1975, DX provides a wide range of delivery services, including parcel freight, secure, courier and logistics services, across the UK and Ireland. From its headquarters in Berkshire, DX serves both residential and business markets.

The group operates as two divisions, DX Express and DX Freight. DX Exchange is part of DX Express, which provides a next-day, pre-9am delivery network as standard. Its solutions include the delivery of critical documents for the legal, financial and public sectors.

DX is unique in that it uses a membership subscription system, as Jonathan, Product & Marketing Manager at DX Exchange, explains: "Our members pay a subscription to be part of the network, annually in advance each year. So our relationship with them is very different to the way it would be if they paid per

item or on account. They use a DX addressing protocol and they've got that DX number displayed on their letterhead, on their websites, and on email signatures. That means we're really embedded into our members' businesses – and we want to reward their loyalty by really trying to lift customer experience."

It's a fast-moving, intensely competitive sector that has made good use of technology to improve its efficiency over the years. But until recently, DX Exchange wasn't using a CRM solution to capture contact information and integrate service, sales and marketing activities. So, when the DX Exchange team was looking for ways to improve productivity following a recent internal reorganisation, adopting a robust modern CRM system was clearly the way to go.

# LIVING IN A WORLD OF SPREADSHEETS

Jonathan says: “Before Workbooks, we were living in spreadsheets that became stale and outdated almost as soon as they’d been created. Asking a sales team to update a spreadsheet with contact information is fraught with danger. Because a lot of the data isn’t used by them, it’s inevitably going to be full of errors and they’re just not invested in keeping things current. Even when people did stay on top of it – and some of the team did that very well – how do you manage things like contacts changing? It was a nightmare!”

These issues meant that Jonathan and his team could only fully trust DX address details, so they relied on physical mail for much of their communications. Although this is clearly easier for a logistics company than it might be for some others, it did limit DX’s ability to communicate on urgent or fast-moving issues. It also constrained digital marketing options.

Without a centralised system, there was no holistic picture of how many calls were coming into the service team or what the recurring issues were. And without delving into the service team’s spreadsheets on a shared drive there was no easy way for sales teams to see why their customers were calling in.



We knew from our annual surveys that there was frustration around customer service and this was driving down our net promoter score and having an impact on our ability to cross-sell services.

*Jonathan Raunsey*  
DX EXCHANGE

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# HASSLE-FREE IMPLEMENTATION

After assessing as many as ten potential CRM solutions, DX Exchange settled on Workbooks, partly because it ticked all the necessary functionality boxes, including its strong information security credentials. But there was also a less tangible reason, as Jonathan explains: "Interacting with Workbooks felt like dealing with a company that was similar to us in many ways. There are much bigger delivery firms than DX and there are also some massive CRM providers. But with Workbooks we never got the sense of being handed off from one person to the next. It made a difference to us that we had consistent contact with just a few people – including the Workbooks CEO. It suggested that this was a company that really wanted our relationship to work."

The pre-implementation requirements gathering workshop helped to crystallise thinking, says Jonathan: "Learning about the way Workbooks is set up in different record types and how they're linked together was a useful exercise. It helped us to rethink some of the things we were already doing in spreadsheets and mapping them together in a continuous way."

After a straightforward implementation, during which the DX team were 'ruthless' about which notoriously unreliable legacy data should be included, Jonathan noticed an almost immediate improvement in the quality and quantity of contact information in the CRM. He says: "In the first month or so we'd doubled the number of contacts. Because people were using the system day in, day out, they were soon creating contacts without even realising it."

# IN AT THE DEEP END

Just a few weeks after implementation, the UK was plunged into lockdown by the Coronavirus pandemic. Jonathan says: "I think we'd been live for six weeks when lockdown started. People were just starting to get to grips with things like logging cases and creating tasks when all of a sudden they were forced to work from home, doing everything remotely."

During this unprecedented period, Workbooks helped DX to target communications much more effectively, resulting in positive feedback from health sector customers in particular. The number of sales leads that have been channelled to the right team first time has also seen a marked improvement since the CRM was rolled out.



We had to implement a slightly different service during the peak of the pandemic too. Our members are mainly from the legal, public and financial sectors but during the pandemic we had much more health sector-related work, such as moving samples from hospitals to laboratories.

*Jonathan Rawsey*  
DX EXCHANGE



# POSITIVE FEEDBACK

Jonathan says: "It's a testament to Workbooks that early feedback was generally very positive, despite the disruption caused by COVID-19. I think it helped that from the outset we were very open and up front in our communication on rollout plans, sharing ways we knew the CRM would help people."

"Most people were enthusiastic about adopting the system, especially once they'd seen how it could improve customer communications. I think everyone understood the value that was added by these improvements. We know we would have had a lot more calls and emails to deal with during lockdown without it.

"It definitely improved the customer experience too – you could hear the surprise and delight in people's voices when they called in and we were immediately aware of who they were and all the details of our relationship with them."

# FUTURE PLANS

The next steps for the DX Exchange team are clear to Jonathan. He says: "One thing we're still trying to do – and it's something that hasn't been helped by this extended period of remote working – is to use the CRM for time, task and calendar management. People are still using Outlook for that.

"The other big task ahead of us is to potentially integrate our old membership subscription and billing system into Workbooks. We're still using an old legacy system to manage renewals and invoices. It will be a big win for us if we can integrate these key functions into the CRM."

## ABOUT

### INDUSTRY

Package/Freight Delivery

### NUMBER OF EMPLOYEES

4000+

### IMPLEMENTATION DATE

February 2020

### TECHNOLOGY

- Workbooks CRM Pro
- Workbooks Outlook Plug-in
- Workbooks Mapping Module
- Spotler Marketing Automation Suite

