



## Overview

**Customer:** XTRA Lease

**Web Site:** [xtralease.com](http://xtralease.com)

**Customer Size:** 600

**Country or Region:** United States

**Industry:** Transportation and logistics

**Partner:** [covenanttechnologypartners.com](http://covenanttechnologypartners.com)

## Customer Profile

St. Louis-based XTRA Lease is one of the largest trailer leasing companies in North America, renting and leasing trailers through its 80 branch locations.

## Business Situation

Outdated software and an inflexible reporting system were producing a glut of ad hoc operational reports with limited usefulness. XTRA Lease's management and field sales force needed real-time data and a centralized way to disseminate it.

## Solution

Microsoft Business Intelligence solution featuring Microsoft SQL Server 2005, Microsoft Office SharePoint Server 2007, Microsoft Office PerformancePoint Server 2007 and Microsoft Office Excel 2007.

## Benefits

- Aggregates real-time customer data
- Boosts productivity in branches
- Provides self-service custom reports
- Frees up IT resources
- Facilitates faster decision making

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[www.microsoft.com/casestudies](http://www.microsoft.com/casestudies)

## XTRA Lease Revs Up Its Reporting and Sales with Microsoft Business Intelligence

"Taking best sales practices and giving users across our many branches the same targeted set of customer and sales methodology is going to pay off in a large way."

Robert F. Lambrecht, Chief Technology Officer, XTRA Lease

*Instead of waiting up to six months to have IT retool key production reports, XTRA Lease employees can now – within minutes – access and organize the information to suit their needs – changes that keep the company nimble in a fast-moving market. Simple dashboard snapshots of customer data help employees see needs and opportunities to fine-tune sales and retention efforts.*

## Business Needs

XTRA Lease, a Berkshire Hathaway company, manages a fleet of nearly 125,000 over-the-road trailers, renting and leasing them from 80 branches in the United States and Canada. Its customers include major manufacturers, retailers and transportation firms that either want to skip the expense of owning trailers or need to temporarily supplement an existing fleet. The 52-year-old company has grown through acquisition and boosted sales by offering advanced technology and services such as trailer tracking and emergency road service.

With three-quarters of its staff working in branches or from the road, XTRA Lease needs technology that fosters collaboration and keeps vital information flowing to and

from the St. Louis headquarters. The company recently embarked on a technology overhaul that included adding wireless networking, new desktop and laptop computers, and the Windows Vista® Enterprise operating system.

At the same time, XTRA Lease needed to upgrade its data reporting system. The existing platform was inflexible, a decade old and had no cost-effective upgrade path.

"We needed a fresher, more modern product to keep up with our growth and reporting needs," said XTRA Lease CTO Robert F. Lambrecht. But replacing it wouldn't be easy – it generated more than 3,000 ad hoc reports that would have to be converted or replaced.



## Solution

XTRA Lease considered solutions using Business Objects, Actuate, Agnos, Oracle and IBM, Lambrecht said. The company chose a Microsoft® Business Intelligence (BI) solution because it offered easier integration and was cost-neutral with the comparable options – even after adding in the data storage component.

With the guidance and expertise of Covenant Technology Partners, XTRA Lease deployed Microsoft SQL Server®, Microsoft Office SharePoint® Server, and Microsoft Office PerformancePoint® Server (now part of SharePoint Server 2007). Covenant also developed a custom PerformancePoint Server component to enable sales to quickly access and drill down into a wide variety of key customer data such as rental history, types of equipment, maintenance schedules, payment history, and usage of value-added services.

“From Day One, we built this system to make our sales team more proficient and prepared,” commented Lambrecht. “Having information at a glance takes the guessing game out of the sales process and enables us to make faster decisions, boost sales and retain customers.”

## Benefits

For XTRA Lease, the improvements have been dramatic, and the usage “wildly popular” according to Lambrecht.

### Simplified, Self-Serve Reports

After training staff for an afternoon, the group capable of pulling reports expanded from three to more than 25, nearly eliminating the backlog on IT and putting the power in the hands of the users who need it most.

Now, instead of asking IT to create new reports, users tweak reports to their liking and

no longer need separate versions. As a result, XTRA Lease was able to reduce its 3,000 ad hoc reports to the most useful ones – approximately 30 standard IT reports. The rest employees create and share with other teams.

### Increased Sales Efficiency and Performance

Speed has also been an important factor. Reports used to take several minutes to generate and would lock up an employee’s screen. Now, they take only 10 to 15 seconds and allow people to multitask while they are being created.

“Being able to quickly retrieve the information needed to address customer questions is certainly a differentiator and an advantage for us in a competitive market,” said Chris Scheele, XTRA Lease’s director of business technology.

For example, sales staff can easily access customer data in a dashboard format that helps them immediately spot opportunities that weren’t visible before – and to act on them while they’re in the field or on the phone with customers.

“Now our sales reps can pull up a report in the parking lot before they meet with a customer and have an up-to-the-minute view of the customer’s trailer leasing history or the number of available refrigerated trailers in California – and have complete confidence in it,” explains Scheele.

### Best Practices Rolled Throughout the Branches

With a fluid, decentralized business, XTRA Lease relies on the BI solution to be the central repository for corporate documents, from training, forms and procedures, customer history and sales information.

“This level of visibility and consistency across our branches helps us provide a higher level of service to our customers, large and small. It’s like taking our best sales person and allowing their best practices to guide more folks in the field. It has really moved us to providing a higher level of service to our customers.”

### Moving Forward

XTRA Lease has already fulfilled the CEO’s top goal – to align sales activity with customer transactions to highlight potential future business opportunities. Scheele adds, “We now have visibility into how sales activities are translating, or not translating, into revenue. Understanding that relationship is critical for us to make sound business decisions.”

And, the company is ready to do more. “If this was a journey in going to school, and we started in the second grade, I think we probably graduated high school and we’re starting college,” Scheele said. “Now we have aspirations for post-doctorate work.”

### Software and Services

- Products
  - Microsoft SQL Server 2005 Enterprise
  - SQL Server Integration Services
  - SQL Server Analysis Services
  - SQL Server Reporting Services
  - Microsoft Office SharePoint Server 2007
  - Microsoft Office PerformancePoint Server 2007 (now part of Microsoft Office SharePoint Server 2007)
  - Microsoft Office Excel 2007
- Technologies
  - Reporting
  - Analytics