

## CASE STUDY



### INDUSTRY

# Logistics

Salesforce optimizes company's logistics operations, enabling efficient handling, transportation, and nationwide container train operations.

### Value Creation Modules

#### Customer Life Cycle Management

Automated customer onboarding and lifecycle management with defined milestones.

#### Enhanced Partner Relationship Management

Automated partnership tracking, fostering stronger relationships and collaboration.

#### Point to Point Real Time Integrations

Integrations with different system via REST APIs, allowing real time flow of data

#### Customer Service Portal

Contemporary portal powered by Knowledge base and mobile application.

#### Accurate Pricing and Revenue Optimization

Streamlined tariff rate calculation ensures accurate pricing, optimizing revenue generation.

#### Intelligent Reporting

Real time reports and dashboards for the business owners and operations team to keep a check on business health

### Personas



- Sales Team
- Service Team
- Operations Team
- Data Team

### Products & Technologies Used



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## Logistics



## CHALLENGES

- Lacks standardization in onboarding leads and managing the complete sales cycle, leading to delays and missed opportunities.
- Tariff rate calculation is cumbersome and prone to errors.
- Ineffective Visit Planning and geo-tagging at client locations hinders salesperson productivity.
- Manual ticket handling results in inconsistencies and impacting customer satisfaction
- Lack of seamless integration, leading to data discrepancies and inefficiencies in account management, tariff rate updates and Volume analysis.

- Unified view of customers across sales and service by creating a customer 360-degree view
- Streamlining lead onboarding and manage the complete sales cycle efficiently.
- Implement a tariff rate calculation module in Salesforce that automates the calculation process based on predefined activity cycles and container types.

- Integrate geotagging and visit planning, enabling real-time location tracking and optimized route planning for client engagements.
- Automated ticket generation with internal and external notifications at each milestone, ensuring timely resolution and improved customer satisfaction.
- Predictive analytics and reporting using Salesforce Einstein features.



## SOLUTION



## BENEFITS

- Streamlined SPANCO process with higher conversion rate.
- Unified view of customer with all the transactions at one place.
- Efficient customer onboarding process reducing the lead time by 50 percent.
- Enhanced visit planning with geotagging improves customer engagement
- Reduction in Average handling time and increased customer satisfaction.
- Single source of truth for the teams by virtue of real time integrations.
- Better control over business by virtue of holistic real time reports and dashboards for business owners.
- Operational efficiencies by virtue of real time and data backed collaboration across the teams