

CASE STUDY



INDUSTRY

Logistics

An integrated inter-modal logistics service provider. Managing a network of 9 Inland Container Depots and Container Freight Stations, operating a fleet of 31 trainsets along with 500+ trailers with help of Salesforce.

Value Creation Modules

Customer Life Cycle Management

Automated customer onboarding and lifecycle management with defined milestones.

Optimized Pricing Strategies

Tariff rate analysis supports competitive pricing strategies while maintaining profitability.

Point to Point Real Time Integrations

ERP integration for efficient account management, enhancing operational effectiveness.

Customer Service Portal

Automatic case generation streamlines case resolution, ensuring timely responses and improved satisfaction.

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
- Management Team

Products & Technologies Used



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CHALLENGES

- Developing a comprehensive solution to streamline the end-to-end journey from lead generation to customer onboarding for various stakeholders.
- To facilitate efficient planning and execution of sales team visits, providing them with real-time, 360-degree information on their handheld devices.
- Smooth data flow, between ERP and CRM for account synchronization.
- Maintaining SLA and response time to manage the complains was a challenge
- Very high Turn Around Time for customer complaints hampering customer delight.
- Lack of unified business health dashboard across sales, service and marketing.

- Unified view of customers across sales and service by creating a customer 360-degree view
- Facilitating efficient planning and execution of sales team visits by enabling them to capture meeting details directly on the field.
- Integrating Salesforce with ERP systems to enable one-way data synchronization, allowing for effective management of dwell time, dealer, and customer accounts.

- Conducting tariff rate analysis to determine pricing strategies based on activity cycles including buffer time, on-wheel movement, loading/unloading, direct delivery, LCL consolidation, and bonded warehousing.
- Automating case generation processes and establishing notifications at key milestones to ensure smooth case journey completion both internally and externally.



SOLUTION



BENEFITS

- One-click transportation opportunities in Salesforce streamline operations, saving time and reducing complexity for customers.
- Sales teams efficiently plan visits and capture meeting details, leading to more personalized interactions and improved communication.
- Clear cargo charges at each depot provide customers with transparent pricing, fostering trust and satisfaction.
- ERP integration ensures smooth data synchronization for efficient account management, enhancing operational effectiveness.
- Automated ticket/case generation streamlines issue resolution, ensuring timely responses and improved customer satisfaction.
- Actionable Insights; Detailed reports provide valuable insights for informed decision-making and strategic planning.