

CX MASTERY FOR LOGISTICS



Some eat steak.
We eat software.



CRM IN LOGISTICS

Everyone relies on the transportation industry. It's the underlying web of the business world, and it supports and connects every supplier, service provider, retailer, and customer. It's also an industry on the verge of some incredible changes. Disruption-driven startups and globe-spanning corporate behemoths are competing to streamline the industry—and drive down transportation prices—by challenging the basic assumptions of the industry.

For instance, within the next decade, it's entirely possible that autonomous delivery trucks and drones will become commonplace. Blockchain-based shipping systems could create instantly auditable supply chains, and reduce the need for distributors and other intermediary firms. Customers will have a huge range of faster, less expensive, instantly trackable options for moving products from any one location to anywhere else.

It's easy for an established company to see these changes as a threat, but it's also important not to overlook the opportunities these disrupting technologies can create. It's possible to compete in new ways, access new markets, and expand your sales teams' reach by adopting these innovations early and utilizing systems that make the most of your current customer and sales data.



Understanding CRM

Without CRM, accurately forecasting sales trends becomes much more difficult. And yet, many companies still rely on legacy sales-management systems, which are cobbled together from a variety of existing tools to create a CRM spreadsheet. This situation can create a serious efficiency problem, particularly as data from those tools can't be easily integrated into Transportation Management Systems (TMS) or software for finance and accounting.

Without a modern CRM or CX solution, these companies cannot directly infer trends.

Then after significantly investing time, they will collect and crunch the data.

Consider how difficult it is to answer these key questions when using a piecemeal approach to CRM:

- **Who are your customers?**

How much do you really know about them? You know the name of the company, and you probably know the name of your primary sales contact there. But do you know the chain of command for the company? Who are the gatekeepers? Who are your advocates? Without the right tools to capture this data, it's easy for these kinds of important details to slip away.

- **Why do they ship with you?**

It's one thing to have an order history with a client. Then you'll already be clued in about when their next order will happen, and how large it is likely to be. But here is something that's less obvious, but just as important: An understanding of why they prefer your services over your competition. By collecting, aggregating, and analyzing this data, you can better understand your customers and their needs.

- **When and how do they purchase?**

The more you understand a customer's procurement process, the easier it becomes to focus your sales efforts on getting the best results possible. A customer with a seasonal buying cycle may only need to be contacted a few times each year. Meanwhile, another may be experiencing so much growth that it might make sense to contact them a few times each month. Without CRM, this complex knowledge is far more difficult to share and act upon.

- **Are your customers aware of your new services?**

Why develop new services if your sales team doesn't promote them? Are you missing potential sales because your reps aren't actively promoting new products? It can be a challenge to even see this problem in a traditional sales setting. But a CRM system makes it much easier to track any kind of performance-based sales data.

- **Where does any specific opportunity lie within the sales pipeline?**

By nature, salespeople tend to be optimistic. They see every lead as a person who is on the verge of making a purchase. But this thought process doesn't always line up with the reality of where each lead lies in the qualification process. Without the right data, there is no objective way to see how many deals are approaching completion, are stalled, or are on-schedule.

Once you have the right tools, these questions are simple to answer. Regardless of the industry, data about customers and sales should always play a vital role in forecasting, strategic analysis, and planning. Forward-looking reports generated by CRM and CX provide needed context and counterpoints to lagging indicators (such as production capacity, production runs, and raw material purchases).



More importantly, if you know more about your customers and their needs, you'll be able to manage the relationship in new ways. This knowledge provides immediate benefits, in terms of overall sales, but it can also help improve and optimize other aspects of your business.

By using CRM-derived data, your analysts can:

- **Help improve cash flow.**
- **Predict sales lulls or spikes in demand.**
- **Reduce transportation and inventory expenses.**
- **Craft strategies for reducing churn rates or increasing overall profitability.**

CRM software allows a company to store information about every relationship that the company has, and it provides tools to easily update those records. By using that data, CRM can determine where an opportunity is along the sales pipeline, or alert a sales rep to get in touch with a customer they haven't recently spoken to.

CRM can utilize every part of the customer experience with you in some way, which makes it the perfect tool for managing every stage of the customer lifecycle.

Most CRM software is built around four key capabilities:

- **Marketing Automation: Includes lead generation, email marketing, social media management, and campaign management.**
- **Salesforce Automation: Includes activity tracking, contact management, and deal tracking.**
- **Reports and Analytics: Includes business intelligence, forecasting, and commission management.**
- **Service Desk: Includes customer support and other post-sale activities.**

It's easy to see the value in CRM software, since it provides a framework for keeping customer data connected across a variety of departments, situations, and workflows.

Most CRM platforms also offer a wealth of plugins and modules, provide tools for specialized workflows, enhance functionality, and add third-party tools and services.

A complete CRM solution isn't about the software. Rather, it's about creating a comprehensive strategy for enhancing all customer relationships. This creates the best customer experience. How?

The better customer relationships are managed, the more effective the marketing, sales, administrative, and customer service functions can become.



WHAT ABOUT ORDER MANAGEMENT?

While many businesses prefer a standalone Transportation Management System (TMS), it might frequently make more sense to build order management into the CRM. For instance, in a transactional relationship with repeat customers, it could be considerably more efficient to manage those orders through CRM.

Quoting is another process that's not generally connected with CRM.

Many logistics companies face this situation: In a company that handles a high volume of complex quotes, the method for delivering them may be a Configure Price Quote (CPQ) system.

When the deal is closed, those products often become assets. Thus, a CRM system is ideal for tracking sales-related data (such as contracts, tax rates, and expiration dates). CRM can also play a huge role in service desks. Do customers need a login to submit tickets? Do they want to see their past orders, or track the status of a current order?

In all of these situations, the goal is the same: Use all available data to create a 360-degree view of the customers. It doesn't matter what the source of the data points comes from. (Even third-party vendors can play a big role.) The important thing is that all of this customer data should be piped into a CRM or CX system. The more robust the customer data, the better the relationship with the customers can become.



Omnichannel Support

Even if your company relies on a single sales channel, it's important to keep an eye on the other channels you might have neglected. For instance, not every transportation firm needs to have an ecommerce site, which would significantly benefit from a substantial social media presence. But just as your customers' expectations change, your company should be ready to adapt.

For instance, your firm might not see the need for a dedicated mobile site or app. However, your clients may see things differently. Who can blame them for wanting to see up-to-the-second location and status updates?

If there's a problem, the first place they'll look for a solution is online. If they have a question, they won't think to call a support rep; they'll reach out on Twitter, or look for a live chat option. When viewed as a tool for sales and customer satisfaction, this kind of support can be invaluable.

The more closely your ecommerce and other channels are integrated with CRM, the easier it is to capture data about your customers. This situation allows you to see which products your customers are viewing, receive notifications when a prospect downloads marketing content (such as service brochures, case studies, and whitepapers), and use automation to connect customers with dealers or installers.

CX also makes it much easier to bring your sales and support systems together. Better yet, it can even help you see trends that were once invisible, and help you connect with potential customers you never knew about.

CX-Optimized Sales Pipelines

In the sales-funnel model, every lead passes through a series of qualifying gates. When using a CX system to enable omnichannel support, a transportation company opens up to have even more leads coming in.

Anyone that doesn't fit is disqualified. But anyone who does fit passes further down the pipeline—until the deal is closed, and they become customers. In a transportation context, a lead is any company that needs to ship products.

You may have to put different qualifications on what a lead is to your transportation company. For instance, if you only ship FTL, then companies utilizing LTL freight shipping would not be a lead for you.

Qualification can be a messy process. Without a clear structure and workflow to steer opportunities through each stage, it soon becomes inefficient.

To further complicate the situation, the sales structures aren't standardized. Firms that serve identical niches within a given industry often have completely different sales philosophies, practices, and qualification standards. For instance, one 3PL may send all of their large-scale orders to their business-development team, while another may send them directly to their inbound-sales team.

In companies with small sales teams, there may not even be a formal system for handling leads. It may be up to the individual manager, or even the salesperson, to decide when a lead has become an opportunity. This situation may briefly work for very small operations. But without clearly defined workflows and qualification standards, it's only a matter of time before the ambiguity starts to cause serious headaches.



A CRM or CX solution can replace this informal approach to lead qualification with a clearly defined, scalable system. It takes the guesswork out of the workflow, which allows managers to see every lead and opportunity status. It's emphasizing how to properly build a customer relationship, giving them the best experience possible so they continue to be customers.

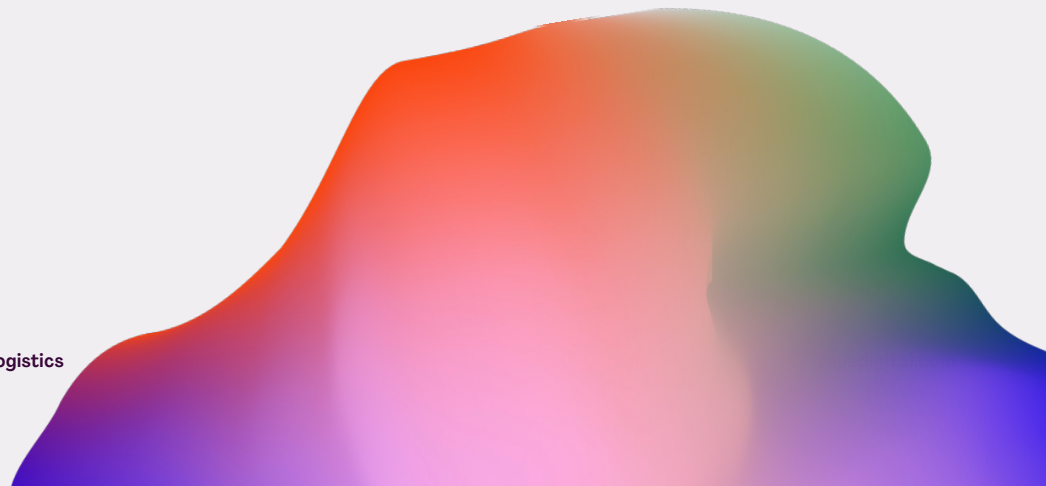
Well-designed CRM solutions enhance this process even more by providing distinct software modules during each step. For instance, one module handles leads, while others manage opportunities, accounts, contacts, and even support. CRM can even incorporate data from TMS, CPQ, Outlook, and other systems to provide the right data during every stage of the pipeline.

Even companies with unique structures and pipelines can benefit from CRM. As an adaptable set of modular tools, CRM can be adapted to any logistics process, industry, or sales cycle. It's simply a matter of embracing the flexibility and customization of the CRM software.

Ironically, some transportation firms have had bad experiences with CRM, specifically because they try to use the default version of the software. They see CRM's list of features, which has a huge range of modules available, and they insist on activating every bell and whistle. Instead of a smooth, simple system for managing opportunities, CRM becomes a tedious, productivity-leaching pain.

One example is leads provided by a parent company or if you partner with a carrier. Those leads have already been qualified in most cases, so why not simply push the data directly into modules for managing accounts or opportunities?

Working through what information you need to best serve your customers not only creates a better customer experience, but it streamlines internal processes as well. CX creates value for your sales team, too.





CX BENEFITS FOR THE SALES TEAM

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What's the value of CX to the sales reps? CX data can help them make their case—if they can use it as a tool to demonstrate they aren't getting enough lead flow, or that their geography is weak (compared to another rep). For instance, if a sales rep is worried they don't have enough deals in the pipeline, they can use real-time data to demonstrate it.

How many sales organizations have lost exceptionally talented salespeople because they felt like they weren't being given enough opportunities, or were being unfairly treated because something outside of their control knocked them off their quota attainment for that quarter or month?

From an employee-management perspective, it's always better to discuss these kinds of problems by using cold, hard facts. CX management tools objectively collect and report sales data, and having access to these kinds of reports can give the sales staff a new perspective on their performance. The more the staff values data, the higher their overall adoption rate will be.

With CX-reports driving the sales meeting, the focus changes. Instead of being an off-the-cuff general update from other members of the team, the meetings now involve identifying and solving specific problems.

Without the more loquacious members of the team talking about their hopes and dreams regarding the biggest deals in their pipeline, the other reps have something more to do than watch the clock until they can get back to work.

A CX-focused meeting cuts out the noise, and focuses on the signal. If a rep is struggling to understand why an opportunity isn't moving forward, the rest of the team now has the chance to offer their collective advice and insight. These meetings allow the entire sales team to leverage their combined experience, in order to solve problems (big and small).

**Here's an example:**

A company specializes in the delivery of heavy equipment, and there's a new rep named Chris. He joined the team a few months ago, and only has a basic understanding of the logistics and transportation business.

Chris has worked hard, and has a big opportunity to win a contract with an industrial-crane company that is looking for a more regulation-compliant firm. This deal is worth nearly \$3 million in the first year alone, but it has been stalled for nearly a month.

At a typical sales meeting, Chris would probably just say, "I haven't closed it yet, but I'm working on it." In a CX-driven deal, the sales manager would say, "I see that this \$3 million deal has been stuck for a month. What's keeping it from moving forward? Is there anything we can do to help it along?"

In all likelihood, Chris will probably explain his situation at this point. Then the other reps could ask him questions, tell him how they solved similar problems in the past, volunteer to sit in on his next call, or provide other kinds of help.

Instead of simply being a status report, a sales meeting has now become a form of collaborative problem-solving. After a few minutes of discussion, Chris should have several new ideas about how to nudge the deal forward.

Having your sales team be focused on CX is important, but the same goes for the rest of your team as well, especially customer-facing teams.



CX BENEFITS FOR LOGISTICS AND TRANSPORTATION

For many transportation companies, gaining and retaining customers is a huge deal. Once a customer signs up for a shipment or two, you can easily still be vying with your competitors for loads three, four, and five. So how can you better serve your customers? How can you best engage with them, while still being able to balance everything else on your plate?

Utilizing CX for transportation and logistics software, such as a CRM system, can go a long way in establishing a relationship with customers and keeping them around. When you have CX software that focuses on logistics, you can customize the process to meet your specific needs. Whether you need to integrate your CRM data with your TMS data or have a clearer understanding of every step of the transport process, having proper software can extend your capabilities far beyond any Excel program a company may rely on.



True Team Collaboration

In any business, silos can be real challenges. But for transportation companies, they can be even bigger headaches. If a customer calls wanting to know where an order is, they will quickly get frustrated when their simple question doesn't receive a simple answer.

A CX system includes all the data about leads, prospects, and customers. So everyone who needs to see it can.

Once you add in integrations into other software, you have broken down significant boundaries. Now anyone who gets a call can look up the caller's data and handle quick information. And if it needs to be passed off, you can send it to the right person. Your team can now better monitor the workflow and communication with your customers.

Even better, onboarding new employees moves faster when they can have all of a customer's information at their fingertips—instead of having to engage with multiple team members just to get a glimpse.

Automated Request Processing

Not only does CX-centric software help your team gain information more quickly, it also streamlines their work processes by automating routine tasks. From the beginning of a customer's journey to the end, you can automate processes, such as receiving requests, assigning them to managers, managing orders, and invoicing.

Your customers want fast, accurate support. And with proper CX software, you can provide it to them.

Better Data Management and Reporting

Both logistics and transportation have a lot of moving parts, on and off the road. Understanding your customer's needs is essential. Having the ability to forecast their needs? Even better.

When all your data is connected and accessible, you have a better data management system and way better reporting capabilities.

For instance, with integrated, CX-focused software, a manager can look through a client's previous orders to see if there are any spikes or valleys in their loads. Maybe a client ships live plants. If so, you always reach out to them right before springtime—every year, like clockwork.

Yet once you have your CX data in place, you uncover that winter loads spike up, too. Previously, you never considered the Christmas tree market for this client.

Ultimately, you can analyze all your previous interactions with customers, prospects, and vendors.

Better Sales and Marketing Performance

When you have better insight into your customers, your marketing team can build better, more accurate buyer personas. They can also create better sales enablement collateral for your sales team, which means they can close more deals.

By adopting a CX system to manage your customers, your sales and marketing teams can:

- **Offer support through multiple channels of communication.**
- **Identify the best channels to attract customers.**
- **Better manage requests that can lead a prospect to the first sale.**
- **Analyze each stage of the sales pipeline and better understand each piece of the customer's journey.**
- **Set up calls, Zooms, and emails—right from inside the system.**
- **Create drip campaigns to current and past customers that support reengagement efforts.**



Increased Cost Efficiency

The better the workflow, the better the cost efficiency. The more you can automate mundane tasks, the more your team can focus on speaking to clients one-on-one and handling more difficult tasks.

When applicable, let the software do the work. For instance, if a client sends in a new billing address, one team member may have to upload that information into the accounting system. If your accounting is integrated with your CX software, then that information can get sent directly. There is no need for another team member to have to go into another system to update that information.

Or worse, the information never gets updated in all the places it needs to, and no one knows the best address—because it's inconsistent throughout your systems.

CX for transportation and logistics software allows you to eliminate such mistakes.

Real-time Data

These days, customer experience is a catchphrase in almost every industry—it is not just about how we think we service our customers anymore. It's also about the experience they have working with us. Our clients need to know how we are best servicing them. Part of the way we attain this knowledge is via communication—in real time.

For example: a fuel injector pump manufacturer gets a customer complaint from a car manufacturer because they received defective parts. Right now, they don't want excuses about why it happened. They just need proper fuel injector pumps so car production isn't halted because of defective parts.

The fuel injector pump manufacturer stays open for 24 hours a day over the weekend. The team quickly assesses the situation and gets quality parts made and shipped out.

It's Monday afternoon, and the car manufacturer is looking for an update on the parts. So, the fuel injector pump manufacturer reaches out to its transportation firm to ask for an update. The transportation firm customer service agent logs into the CRM or TMS system and accesses information about where the shipment is. Then the manufacturer can have an update in real time to report back to its customer.

Without technology, there would be a further delay in information. The fuel injector pump manufacturer could have to sit on the phone waiting for someone who knows what they are talking about.



Artificial Intelligence

Transportation firms that have started leveraging artificial intelligence (AI) are ahead of the game. This area will continue to expand because it reduces traffic congestion and accidents, which creates safety for both your drivers' and your customers' goods.

AI is expanding its capabilities in a lot of different industries, but this is especially true in this industry. According to reports, transportation is expected to reach 3.5 billion dollars by 2023.

Individual Customer Service

In the transportation industry, continued customer support is imperative. For instance, maybe you're a 3PL and just nabbed a load from a new customer. If so, you still want to gain all their other shipments, too. By having an industry-based CRM or adding in customizable modules that specifically suit your needs, you can cater your software and offer individual customer service to your customers.

So not only does your CRM allow you to have access to the most up-to-date information about your customers, it empowers you to slice and dice the data that matters to your customers. CX solutions are not a one-size-fits-all solution, and they don't need to be.

How do you achieve the ultimate customer experience?



CRAFTING A CX STRATEGY

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By developing a strong CX strategy, transportation and logistics companies can meet — or even exceed — customer expectations. They can rapidly adapt and refine products based on customer feedback, supply chain changes, and even IoT usage data. Logistics firms can even use their CX strategy to drive prospecting and sales, increase conversion rates, boost product ratings, and improve customer retention.

To understand how a CX strategy can deliver results in transportation, it helps to split the customer experience into three core elements:

Culture

What is it like to be a customer working with your company? How easy is it to order products, provide product feedback, or learn more about your products? How difficult is it to resolve product or order issues?

Process

How does your company use customer data? How much of a role do customer and IoT data play in decision making? Is critical decision-driving data readily available, or is it hidden away in data silos?

Technology

Is your company's technology optimized to streamline processes? Does your technology make it easier to be a customer? Does it provide meaningful insights for product design, order management, customer satisfaction, marketing, and sales? Is there an ongoing investment in new technology?

All three of these elements play a role in developing a strong CX strategy. The most obvious connection between them is the customer journey. By examining the company culture, it's possible to identify underlying problems in customer acquisition, satisfaction, and retention.

When a company addresses disconnects and gaps in process, it can reclaim extremely valuable insights into customer frustrations, expectations, and purchasing priorities. By investing in technology improvements, the company can substantially streamline operations, remove barriers to entry, and develop better products based on actual customer needs.



CX STRATEGY BENEFITS

These CX strategy improvements benefit more than just the customer. A well-designed and implemented CX strategy can also yield serious benefits for distribution partners, carriers, retailers, suppliers, and even internal teams. The benefits are felt throughout the entire business network, including the end customers.

This approach to CX strategy can also provide a greater degree of flexibility and freedom for transportation and logistics companies. Updating your approach to the customer journey becomes less daunting to develop targeted plans to improve customer acquisition, build strong cross-channel marketing, or improve social media and online visibility. Your company no longer needs to rely on retailers and partners to provide your company with customer insights and product feedback. You now gather that information as a direct result of a comprehensive CX strategy.

So, how does a transportation firm actually develop a useful CX strategy?

No two companies are the same. CX strategies need to be crafted individually, focusing on what works for their market and customers.

However, some general concepts apply broadly to every CX strategy.



Keep Focus on the Customer

Today's customers have higher expectations, and retention of these customers is becoming more of a challenge. What always worked in the past may not work anymore. An effective CX strategy helps you keep your customers. How? Because it is easier to become a customer, and stay a customer. It establishes a strong relationship between you and your customer, allowing customers to provide feedback that improves the service. Feeling like they have a say in their needs makes customers more likely to stay with a transportation or logistics provider over a competitor.

Create Data-driven Strategy

Make use of your service and customer data. Use this as an opportunity to liberate your data from department-level silos in customer service, sales, services, and marketing. Use that data to inform your planning, and to gain a clearer understanding of customer needs. When possible, integrate those insights into other parts of the business, like your service development, online customer experience, and even marketing.

Establish Clear Goals

An effective strategy needs to focus on achieving a specific outcome. In the case of CX strategies, the structure should be arranged with a clearly defined goal in mind. A CX strategy for customer retention will have a different set of priorities than one aimed at acquisition. Establish a methodology for measuring progress, and be willing to adjust and refine those methods over time to progress toward your goals.

With the right CX strategy in place, transportation firms become more resilient to the ever-changing nature of the business. Data-driven decision making allows for better planning, and avoiding needless risks. Improving the customer experience makes it possible to improve every aspect of the customer relationship, from loyalty to part or product ratings. By streamlining operations with CX in mind, logistics companies can even become more agile, responsive, and competitive.

Optimization is Where CX Strategies Shine

It's important to remember that implementing a CX strategy isn't a one-time thing. It's an ongoing process of optimization that involves every step of the customer journey. Progress needs to be measured, scoured for new insights, and then used to inform further strategy and planning. It's something that deserves a dedicated line item in your budget, and constantly revisited with ROI in mind.

Invest in the Right Technology

Improving the customer experience starts with measuring and analyzing data from every corner of your business. Much of this data is already available through your CX, CRM, ERP, support desk, and other business solutions, but other important pieces may require additional investment and development. IoT, marketing automation, website analytics, and even supply chain data can also play a role in CX optimization. Bringing all these elements together is an important investment, and it's not the time to start cutting corners on the budget.

The suggested technologies that can help a company master CX in transportation and logistics are on the following page.



TECHNOLOGY STACK TO MASTER CX IN TRANSPORTATION AND LOGISTICS

No matter which part of the industry you are in, there's one constant: technology is a driving factor in transportation and logistics.

CRM

As explained on the previous page, a CRM system is crucial to your CX.

First things first, transportation analytics improve customer satisfaction in two key areas:

1. **Operational efficiency**
2. **Decision making**

Without a modern CRM or CX system, transportation companies can only indirectly infer trends. The more you understand a customer's procurement process, the easier it becomes

to focus your sales efforts on getting the best possible result. Analytics can lower costs, wait time, and improve the overall experience.

Chatbots and AI-based Customer Service

Artificial intelligence and chatbots are often used on websites to help answer questions to customers. Chatbots can be quite intuitive and users can engage without the need of live support staff. AI Chatbots support day-to-day operations. Customers can save time by conversing with a chatbot about appointments, shipping updates, product information, or facilitate general troubleshooting.



TMS

TMS systems are of the utmost importance to many businesses in the transportation industry. Why? Because they are specifically designed to streamline the shipping process. TMS complements CRM so well because it automates processes and gives you valuable insights about them. But instead of providing knowledge related to sales and customer service, a TMS system provides insight that will allow you to save time and reduce spending on future shipments.

For example, with a TMS system, freight shippers can take a deep dive into bettering their quoting processes for each delivery. They can see if loads were previously affected by seasons changing or certain holidays. Ultimately, they can take a look at the historical data they've collected about routes and customers and make educated decisions about the future.

Marketing Automation

Customers must navigate a complex ecosystem of players throughout their journey. A highly relevant engagement approach versus traditional methods will retain and keep new customers.

Marketing automation gives transportation companies a real chance to plan seamless customer journeys across multiple platforms and touchpoints. It enables better lead targeting from the top of the funnel to the bottom.



TOP REASONS TO INTEGRATE CRM AND TMS TO CREATE THE BEST CX

The faster the world moves, the quicker the transportation industry needs to move to get it there. So what do logistic firms need? The technology that will support this rapid evolution. The good news: This technology exists.

CRM software gives you a significant amount of insight into your customer and prospects. With TMS, you can take a deep dive into your supply-chain management and learn more about your shipments and warehouses.

What happens when you combine these two dynamic systems? A 360-view into your customers and their loads, which will help you gain efficiency and create visibility for anyone who needs it. Since all this information is accessible in one place, a CRM/TMS integration helps eliminate silos.

This feature also improves your visibility of important shipping information. Armed with this data, a company can produce more accurate delivery times, rates, orders, and quotes.



A Better Understanding of Your Customers' Needs

You landed a new client, and you're transporting a new load. Great, right? But that's not the end of the story. That new client is still a prospect for all their other loads.

When you sync these two systems together, you have access to all of the following information about your customer: shipment statuses, overviews of customer journeys, order histories, payments, warehouse inventories, current rates, and overdue items.

So, the integration of CRM and TMS is key to truly understanding your customers' needs.

Increased Efficiency

With all your valuable data in one place, your team doesn't have to switch back and forth between programs. For instance, if a sales rep is performing a quarterly check-in with a customer, the salesperson may need to answer questions about past records and see the status of a current shipment or load.

If your CRM and TMS systems aren't integrated, the rep may have to dig through two different systems. Then you'll waste your customers' time, and you may lose their interest.

Additionally, you save time during data entry. Instead of manually copying data from CRM and keying it into TMS, the information automatically transfers. BONUS! And since there's no need to duplicate data, there are fewer data-entry errors.

Quicker Access to Information

Quicker access to information is especially important if a sales rep or technician needs to help a customer when he or she is out in the field. What if a client asks this professional about the protocol for leasing equipment or viewing a specific tariff schedule? Without synced data, he or she would have to sift through database after database.

Better User Experience (UX)

By integrating your CRM with your TMS, you can create a better UX on desktops, laptops, and mobile devices. If you simultaneously use an email application, CRM, TMS, messaging system, and other programs, your UX could get watered down.

So integrating CRM and TMS improves the experience, as long as users adopt the improved system. A successful integration can help solve cascading problems, including staleness of data, problems with user entry, and lack of business intelligence.

Better Forecasting

Suppose you've worked with a customer for several years. In that case, you can see a summation of past orders and shipments for a specific period, which is a critical way to forecast high-priority customer statuses. With synced data, you can understand where your revenue is coming from. But without this information, this task would be more difficult, and it could possibly be less accurate.

Conclusion:

A Better CX Strategy Leads to More Business

If you are already using CRM and/or TMS software, you have already begun to see the value of emphasizing the customer experience.

It's the same with the structure of the supply chain. When all the pieces of your technology come together and work together, it's a better experience. And a better customer experience can lead to more business.



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