

By Gene Gander

Technology Must Advance Forwarding

With purchasing decisions increasingly being made at the C-level executive or boardroom level and the proliferation of Web-based logistics services around the globe, integrating information systems across departments to support freight forwarding sales efforts is becoming significantly more important if a forwarder is to maintain a competitive advantage.

The explosion of IT-based operating platforms within the growing global economy means the development of a more professional and robust IT-based sales management processes will continue to be increasingly important in the freight forwarding industry.

In a world gone global, the forwarding and logistics market has evolved into an increasingly competitive arena that warrants a new level of professionalism from the sales and marketing department as it relates to the overall business. The key to a successful sales process in today's competitive economic environment is the establishment of freight-specific sales and marketing tools within a comprehensive customer relationship management system.

Because stand-alone applications cannot offer the efficiencies and quality of an integrated, cross-departmental system, a robust, integrated CRM tool provides the best opportunity to get the best value from your operations.

IT integration greatly facilitates communicating significant sales data to all pertinent personnel, including operations, finance and IT departments. The optimal solution is an integrated ERP-like system that automates the sales process and gives management visibility into the process throughout the supply chain. That enables sales information to flow in both directions between sales, operations and management, rather than remain in a vacuum.

By developing a single automated record of customer contacts and data, communications between sales and operations can be vastly improved. If information is kept in multiple systems, it opens up the process to inefficiencies and questions regarding the accuracy of all sales information.

Utilizing accurate and timely information helps to ensure quality control, cross-departmental precision, eliminates the need for repetitive data entry and improves the workflow while providing management with clear visibility into customer accounts.

With a more professional and seamless companywide sales and marketing system, the sales department can set up scheduled reporting tools and pull data seamlessly from the operations pipeline for quality control, avoiding cross-departmental confusion. In addition,

controls for customer tariffs for freight and handling platform can be routinely transmitted to operations and will warn them to utilize customer tariffs at invoicing.

An IT-based sales process also lets spot quotes be entered and tracked accurately throughout the system, which avoids costly rework and repetition, and more importantly, helps create a more positive customer experience.

When it comes to visibility, it is important to keep the customer relationship transparent. Operational quote activity should be clear and visible to the sales department personnel, who can properly follow up on a timely basis. Utilizing IT-based sales management communications permits the general sales call notes, proposals, e-mails and other sales documentation to be accessible to operations and provides increased data accuracy and overall visibility of customer status.

Robust IT-based sales management processes will be increasingly important in freight forwarding.

A CRM model that enables the sales team to see a dashboard synopsis of activity across operations in real time without requiring operational resources to compile it for them provides the best option. The result will help identify shipment activity, lane segments, trade profiles, deliverables, financial data and call cycles, creating more efficiencies and the ability to win more business.

It should be noted, however, that the success of any CRM system must not be judged solely on the value of visibility to management. It must be judged on the value it provides the sales department and its customers.

Any sales and marketing system aimed strictly at providing greater visibility to management will get limited acceptance by the sales team. However, an integrated sales and marketing solution that enables sales personnel to serve their customers better and ultimately maximize revenues and commissions will be more readily accepted and implemented from the bottom up.

There are many very good CRM solutions that serve a plethora of markets. However, freight forwarding professionals are aware that there are intricacies that can only be served by an integrated IT-based CRM system that liaison seamlessly with operations through an integrated sales process.

Establishing this kind of cross-departmental integration and customer-centric IT system is what makes logistics the ultimate service challenge it is in today's global marketplace.

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