

Freight Forwarding Sales Process Requires Higher Level of Professionalism in Today's Global Market

Ten Tips for a Single Automated and Customer Friendly Integrated CRM Tool



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communicating significant sales

In today's increasingly complex global business environment, the sales management process in the freight forwarding industry requires a vigorous new level of professionalism to be effective.

Unlike days gone past, the sales process within the freight forwarding industry today reflects the fact that purchasing decisions are being made increasingly at the C-level executive or board room echelon, as opposed to the old traffic manager and shipping room floor paradigms. This means that today's sales and marketing efforts require a greater degree of corporate participation, cross-departmental IT integration and advanced sales tools to support this new business model.

The key to a successful sales process today is the establishment of freight-specific sales and marketing tools within a comprehensive Customer Relationship Management (CRM) application. The forwarding and logistics market is evolving into an increasingly competitive and tight margin industry that warrants a new level of professionalism well beyond that of what a single sales manager can deliver. Today, a robust, integrated CRM tool provides the best opportunity to execute the sales value proposition by communicating significant sales data to all pertinent personnel, including operations, finance and IT departments.

Since stand-alone CRM applications cannot offer the efficiencies and quality of an integrated sales process, the optimal solution is an ERP-like system that automates the sales process and creates management visibility throughout the supply chain, not horizontally, but *vertically*. This enables the sales process to flow in both directions between sales, operations and management.

Because sales management today cannot deliver in a vacuum, we have identified 10 ways companies can improve sales and operations through an integrated IT-based sales process.

- Develop a single point of contact with a customer for enhanced communications between sales and operations. If a single element of information is kept in redundant systems, it opens up quality issues and questions regarding the accuracy of sales information. Utilizing integrated information ensures cross-departmental precision and facilitates increased sales and customer service.
- Operations should avoid having a single additional element of work to accommodate just the sales process. Rather, the information from operations should flow seamlessly to the sales department. Management is then able to utilize the same, uniform information for reporting and oversight without requiring additional data entry.
- Automate the workflow with a single database. If all the intelligence that sales gather is available to operations, it not only reduces redundancy, but provides management with clear visibility across the sales team's efforts. Data quality is even more of an issue for companies than efficiency. Changing customer organization details, contacts, and procedures is an administrative nightmare with multiple data systems within a company and should be avoided.

VIEWPOINT

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- Provide a single CRM system for pipeline visibility. Customers and sales often dictate specialized reporting during the sales process that is required from operations. By automating your sales management system, the sales department can set up automated reporting and pull it seamlessly from operations for quality control and efficiencies. This can be better accomplished by a single solution that integrates information from both sales and operations. This also provides vastly improved customer service.
- Set up controls for customer tariffs for freight and handling. By automating this functionality within a single sales platform, the ratings are automatically transmitted to operations and warn them to utilize customer tariffs at invoicing.
- Establish a consistent, companywide system. By avoiding cross-departmental confusion, spot quotes can be entered and tracked accurately and systematically throughout the system and warns operations at rating and invoicing. This avoids costly rework, and more importantly, helps create a more positive customer experience.
- Maintain customer status awareness throughout the process. Operations should alert sales seamlessly out of the automated single system database. This improves overall communication and documents that each transaction was completed in a timely manner.
- Utilize IT-based sales management communications. General sales call notes, proposals, emails and other sales documentation are more accessible to operations with a click of the mouse and provide increased data accuracy and total customer status.
- Establish a CRM model that enables the sales team to see a dashboard synopsis of operational activity via automated document modules for real-time activity status without requiring operation resources to compile it for them.
- Maintain transparency to the customer relationship. Operational quote activity should be transparent and visible to the sales department personnel who can properly follow up on a timely basis. The result will help identify shipment activity, lane segments, trade profiles, deliverables, financial data and call cycles, creating more efficiency and the ability to win more business.

The development of a more professional, robust IT-based sales management process is dependent upon building an integrated sales funnel through effective CRM tools to both existing customers and prospects via accurate data and effectual communications among trading partners. A properly automated and integrated freight sales process can greatly enhance target marketing efforts in today's global economy. This, in turn, optimizes management viability across a variety of industries, and manages it throughout the entire sales process.

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Every day, 1,300 logistics service providers, consisting of 33,000 users in 45 countries, move goods through the global supply chain using CargoWise edi's flagship product ediEnterprise. CargoWise edi offers supply chain logistics management systems that provide full integration across all departments and functionality for domestic, regional and global customers. Headquartered in the U.S., Australia and the UK, the Company operates from 12 worldwide offices across the U.S., Europe and Asia. More information on CargoWise edi can be found at: www.cargowise.com.