

Increase Trust & Build Stronger Relationships with Shippers

A 2023 Sales Playbook for Freight Forwarders



Utilize this free step-by-step meeting playbook, outlined by industry expert discussions, to drive better relationships with your customers during sales meetings, resulting in increased revenue, customer retention, and bid expansion.

Contract season is critical for freight forwarders looking to sustain or grow their businesses in 2023. Making the right strategic decisions now can result in winning more bids than ever before.

Relationships and trust in the freight forwarding industry have and will always remain imperative to building the right foundation for success. Although there are many factors at play when obtaining new customers, there are important steps your freight forwarding business can take now to support stronger relationships with current and future customers.

Make an impact with actionable takeaways and strategies from industry experts to come out on top.



“You need to train your team as a revenue leader to know the objections coming, have answers prepared and written down, and then actually practice them out loud.”

Jimmy Speyer,
SVP of Sales and Marketing at Logixboard

Perform Impactful, Repeatable Meetings Now:

1. Keep Meetings Consistent and Result Driven:

If your team can create a standard of consistent, scheduled, and productive external meetings with customers, you can build a stronger relationship as a strategic partner.



Create, and communicate, a routine for meetings.

Walk into every meeting with a plan on what topics, data points, questions, and next steps need to be communicated with the customer or prospect. If your team is aligned on what is necessary to have a successful meeting, you can ensure there is a quality level across external calls.

Clearly outline the agenda and desired results for a given meeting.

Make sure your team and your customers/prospects are fully aware of what will be discussed and what factors each party wants to hear more about. If you can make sure no questions are left unanswered on your end, while also securing what you need to move forward from them, then you can increase efficiency (for both sides) by reducing follow-up communications needed.

Outline a meeting frequency with customers - so all parties can come prepared.

**Completely Customizable,
Free QBR Template
For Freight Forwarders**

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“You’ve got to keep your promises. There’s no good pitching that you’re this forward thinking organization, that you’ve got all this incredible data, and you’re going to change their supply chains for the better, if you don’t deliver on it.”

Sean Crook,
Director at Neolink

2. Prioritize Building Trust and Transparency with Shippers

Shippers will judge your services by how you handle when things don’t go to plan, not when it’s easy sailing. Ensure you are actively building trust with a focus of honest and transparent communications about delays/exceptions.



- Meetings - Keep customers informed of industry factors leading to increased delays and exceptions.**

Highlight your team’s industry knowledge to shippers, while also creating realistic expectations on transportation timelines, by consistently communicating disruptions in the industry. Block off time on your calls to review industry news.

- Have the hard conversations - don’t sit on known delays.**

Create SOPs (with timelines for communications) that ensure your team quickly communicates when there will be delays that impact your shipper. Make sure to also highlight this practice to customers and prospects so they know you’re already prepared to keep them informed.

- Keep your promises, consistently.**

The key to real trust is consistent transparency over time. Make sure your procedures leave no room for distrust, no matter the situation, the team member, the niche of the product being moved, or the time of year.



“We want to leverage the best technology and the best people to deliver the best and most efficient supply chains we possibly can. Our job is to present that to customers and show where we’ve made that difference.”

Sean Crook,
Director at Neolink

3. Empower Your Team with Technology and Sales Enablement



- Use technology for employee recruitment.**

An increase of visibility and data technology in a business is an extremely attractive element for the growing number of analytical thinkers in the workforce. Freight forwarders are able to retain and grow current employees, while recruiting from new areas of the workforce by enabling their work with digital tools.

- Invest in team training.**

Investing in learning and development for your team, with an emphasis on technology, can empower your team

- Give operators access to data & tools to be able to discuss the whole supply chain with your customers.**

Operators should be able to help shippers along the whole process with industry knowledge, input on current events, and digital tools to increase impact. Instead of a particular emphasis on pieces of the transport process, automation gives your team members the tools to provide critical support with shippers from booking to delivery.

- Meetings - Highlight to shippers the steps that have been taken to empower your team and direct efficiency results.**



“Relationships and trust are crucial in the FFing industry; the problems they face may not be your fault, but there’s a difference between ‘my fault’ and ‘my problem.’”

Jimmy Speyer,
SVP of Sales and Marketing at Logixboard

4. Be a Strategic Partner for Shippers

Make your relationship with customers more than transactional; highlight your focus on their business success as a partner.



Prioritize the mindset “If your shippers succeed, you succeed.”

Strategize how your team can make your customers more efficient, track data that highlights these changes, and communicate efficiency gains to customers (share this with prospects as well).

Capitalize on available data and resulting strategy.

Introduce frequent problem-solving and strategy-focused conversations using visualized data. Build trust with your shippers by providing a self-serve view of data for customers that can be used on their own time and utilized in collaborative calls.

Lead tech adoption in your customers.

Change management is a necessary piece to successfully use technology in your operations. Make sure you have adoption strategies in place for your team, for current clients, and for efficiently onboarding new clients onto your digital offerings.

Track and communicate critical KPIs to customers and prospects.

An important benefit that digitization offers the logistics industry is the ability to easily analyze data, resulting in the successful identification and monitoring of important business metrics. While important for internal operations, communicating KPIs with your clients can also build transparency and alignment on goals. Check out some critical KPIs for shippers when evaluating freight forwarders:

- Performance vs. competitors*
- Efficiency gains for current shippers*
- Retention data*

Meetings - Be a part of your shipper’s goal-setting process.



“The process of acquiring new customers, versus selling, upselling, and expanding with current customers simply costs more. You’ve invested the time to gain them as a customer already and now you can deepen that relationship by continuing to build trust, while expanding the amount of business you do together.”

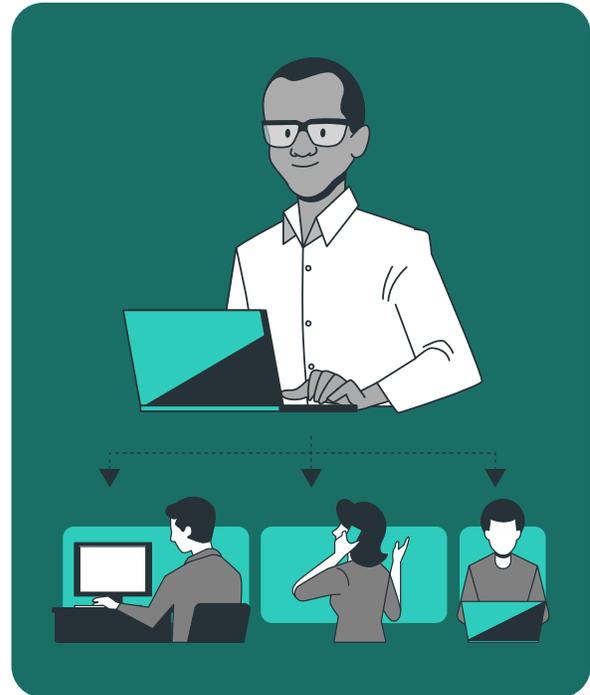
Jon Bass,
Regional Business Development Manager at Logixboard

5. Focus on Customer Expansion

Strategize business growth through not only new clients but also through winning larger volumes with current customers.

- Meetings - Collect updated data on each customer’s current and expected business volume.**
- Keep updated data (when possible) on business volume owned by competitors.**

Inquire how forwarding competitors are tracking the business not owned by your team. Are they at all? Are they partnering with them for success or just focused on completing the job? this with prospects as well).





“Not all freight forwarders need to use the same KPIs; one might have different goals than the other.”

Sean Crook,
Director at Neolink

6. Understand Niches in Shipping and Your Ideal Shipper



- Cater to niche markets and understand how to support them.**

Do your homework on a shipper's industry before meeting with them. Know what challenges and unique processes different types of supply chains are subjected to and come with personalized support.

- Align on Your Ideal Shipper.**

Know who you are as a company and who you serve best. If you are able to differentiate yourselves from the competition by highlighting specialized support you can offer different types of shippers, you can add this to your sales arsenal.

- Do not allow price to be the sole differentiator.**



“You need to build in supply chain resilience and demonstrate that to your customers.”

Sean Crook,
Director at Neolink

7. Build a Resilient Operation to Combat Industry Uncertainties

While COVID-19 was a black swan, it’s not the first event to impact supply chains on this scale, and it certainly won’t be the last.



Be prepared for the unexpected.

As evidenced by recent and ongoing complications from the pandemic, you can’t predict the future. Have SOPs prepared for when things don’t go right and when exceptions are unavoidable.

Stay Nimble and Flexible

Companies that are investing in visibility technology and building resilience into their processes are increasing efficiency for their shippers. Australian freight forwarder, Neolink, shared that a 35% efficiency increase has been noted when using those technologies with an increase in customer service ratings as well.

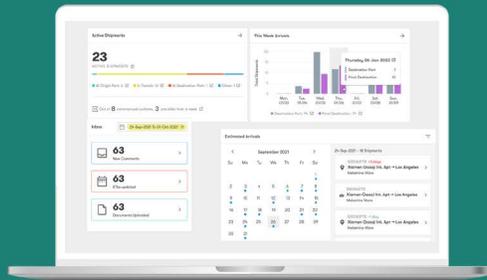
In today's forwarding industry, it's becoming increasingly important to provide clear value to your customers. Shipping rates are down from their peak, and experts are even observing zero or negative freight rates in some cases as shipping lines focus on repositioning their containers. In other words, it's no longer enough to compete on price and availability alone. Rather, you need to show proof that you can achieve the results your customers are looking for. By following these steps to identify your differentiators and push for collaboration that drives impact, you can win more bids over your competition.



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