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HOW AUTOMATION LEVELS THE FIELD AGAINST DIGITAL FORWARDERS

WHITE PAPER

WHITE PAPER PRESENTED BY
LOGIXBOARD

A training tool for freight forwarders and freight brokers to utilize automation capabilities and technology to compete against digital-first forwarders.



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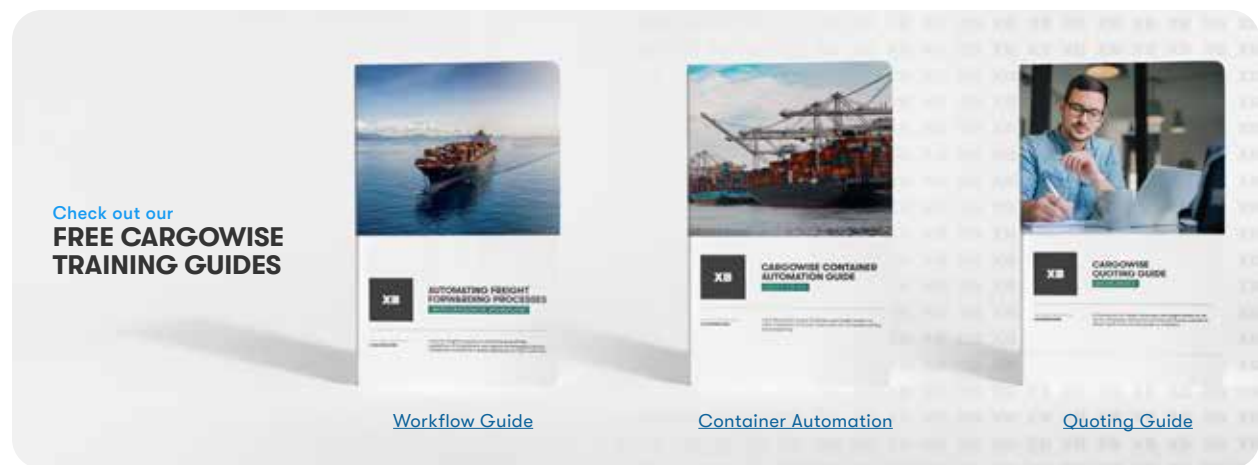
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Summary

Opportunities to automate within a freight forwarding operation have grown significantly in the past ten years as digitization has swept the logistics industry. From customer communications, task allocation, integration connectivity, document management, data sharing, and more, automation is giving businesses the chance to increase their efficiency across the board. This comes at an optimal time, as new competition arises from digital-first forwarders.

A focus by these new industry competitors on customer experience, speedy response times, and scalability has been noticed by shippers and BCOs. However, as traditional forwarders ramp up their own digital capabilities, the lines between them and digital-first forwarders continue to blur.

Established forwarders also have their own advantages in this equation. Strong industry relationships, logistics strategy expertise, and teams of people that know this business inside and out give traditional forwarders an edge. That edge, when paired with the right technology and automation, can be an unmatched offering.



Improves Customer Experience

While digital-first forwarders lean heavily on their technology to drive their customer experience, automation gives traditional forwarders the ability to offer customers that same experience while also providing more with their personalized services and superior industry decision-making.



KEY AUTOMATIONS:

Communication Automations, Shipment Visibility Automations

Shippers value visibility and transparency from their freight forwarding partners more than ever. Communication automations and visibility sharing automations efficiently give your customers the answers to the questions they frequently have on their moving product (sometimes before they can even ask them). This level of timeliness for shippers and BCOs can be the difference needed to support them in communicating with their own stakeholders and making decisions to optimize their supply chains.

Communication automation can provide timely and centralized messaging to your customers that keep them as informed as possible for strategic decisions surrounding their freight. These automations can be seen throughout your operation's workflow to communicate data around milestones reached, delays, and needed documentation. With CargoWise, these capabilities are utilized through their Workflow features with Triggers that can be automated in templates based on the job type being processed by your team.

This improved visibility and transparency for your customers will also give your team more time back to find more personalized solutions for their customer's product journey. [Customer experience](#) is all about making customers' lives better by reducing friction, so naturally, automation that makes visibility data more available to them will help to differentiate your company from competition.

**LOGIXBOARD**

We are a white-labeled technology integration for freight forwarders looking to get more out of their current TMS platform and deliver top-tier customer experience. We integrate on top of your current TMS software to instantly elevate your user experience.

With some digital forwarders, there have been reviews of their customer experience as lacking. Having the technology to meet shipper and BCO expectations does not equate to being able to bypass the personalized service and industry expertise that they have relied on from traditional forwarders for decades. Traditional forwarders can provide that superior customer experience when they level up their technology with automation that supports a less manual SOP, giving more time to scale their quality of interactions and partnership with each customer.

Adds Efficiency to Operations

Automation is the key to maintaining the operational bandwidth to provide customers with the personalized service they desire, while meeting new expectations for customer experience.



KEY AUTOMATIONS:

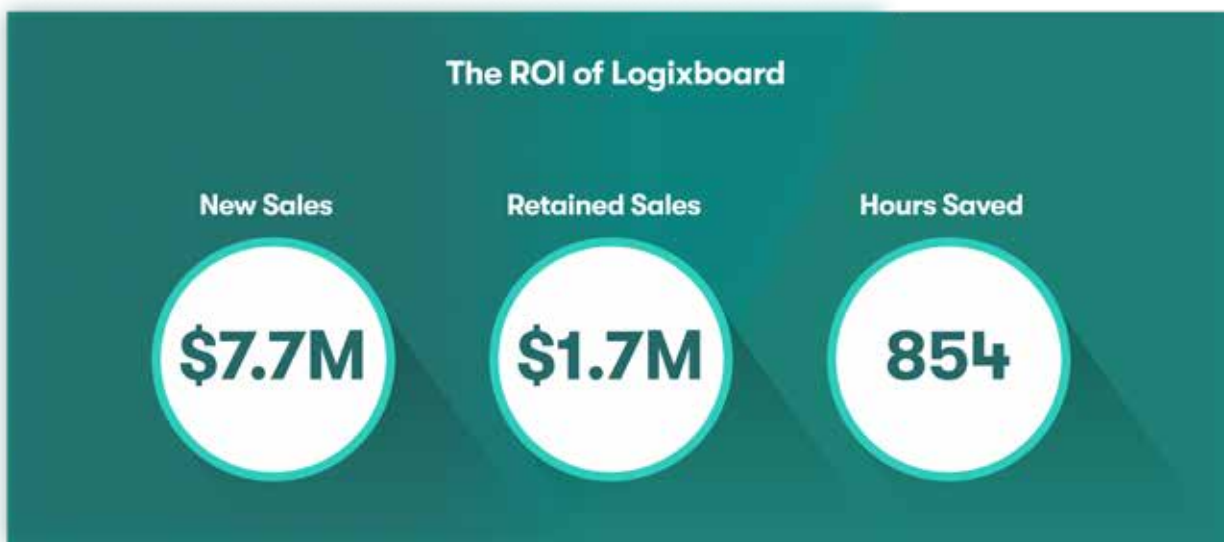
Task Assignment Automations, Invoicing Automations

Remove Manual, Repetitive Steps for Your Team

Adding and utilizing automation in your freight forwarding operation can remove steps for your team. When it comes to document management, invoicing, communication with customers throughout a shipment, and even assigning operational tasks to members of your team, automation can be set up to step in and remove some of the repetitive work. You can build in automation for job types that your team sees frequently to strengthen and shorten SOPs.

With fewer manual steps, there is more time for your team to be more productive and prioritize higher-value tasks for your own operations and for your customers. Your team should look for ways to decrease the manual work around the biggest time sucks (like manual customer communication) and prioritize technology automation there. Then, that additional time can be allocated to dealing with unpredictable job delays, scaling customers, [change management](#) with new technology improvements, and more.

[Logixboard customers](#) have seen productivity levels increase with metrics around hours saved for their team, while also reducing customer churn and increasing sales.



Increase Data Accuracy

The decrease in manual data entry that comes with automation will also improve the overall accuracy of shared data with customers. A lot of industry information includes lengthy strings of characters that may be subject to human error. In addition to creating additional friction and delays for customers, mistakes in a single item can directly drive up operational costs. An address correction charge, for instance, can range from [\\$13 to \\$91 per shipment](#). These fees can add up and cut into your bottom line. Good [order accuracy metrics](#) can also be extremely helpful in courting new customers. When these metrics are strong, your team will see an increase in customer trust, a reduction in customer churn, and grow tools to aid with sales enablement (like glowing testimonies).

Automation also provides your team the ability to scale your operations, without sacrificing the quality of customer experience and without the cost of scaling your employee count. A more efficient operations team will be able to have more time to handle more customers and spend more time growing their customer roster.

Provides Increased Sales Enablement

As automation gains traction in the logistics industry, forwarders are discovering new ways to leverage it as a selling point, both directly and indirectly. In powering your day-to-day operations with automation, you can position yourself as an efficient, fast-moving provider by keeping up with rising expectations, streamlining your quoting and rating processes, and exemplifying a heightened impact on customer experience.



KEY AUTOMATIONS:

Quoting/Rating Automations, Document Creation Automations

Meet Advanced Customer Expectations

For decades, logistics professionals have managed their processes with the same outdated technology. However, more recently, spreadsheets and faxes have begun to make their way out. Customers are starting to want and expect advanced digital solutions from their providers, as exemplified by the recent rise of digital-first forwarders.

Questions about your software stack will come up increasingly in sales meetings as prospects weigh tech more heavily in their buying decisions.

In fact, a [study conducted by FreightWaves and Logixboard](#) found that 46% of shippers switched freight forwarders in favor of one with better technology.

This may be a bad sign for companies who are hesitant to adopt change, but it's great news for those who are ready to invest in growth. As this trend continues, showing customers that you can leverage automation to use your resources efficiently will be key to winning them over.

Increase Quoting and Rating Speed

Quoting is one of the most impactful steps in conversion and acquisition. As a freight forwarder's first point of contact with prospective shippers, the timing of a quote can make or break a potential customer relationship. That's why it's important to respond to requests promptly to close the deal.

However, many forwarders tend to miss the boat on quoting and rating. In fact, an experiment by RPA Labs found that the average response rate to quote requests was only 31%. Among small and mid-sized companies, the fastest response rate was 1.5 hours, compared to four minutes for large companies.

Automation can bring down your quote response time drastically. By leveraging TMS-powered features like autorating, you can streamline your quote creation process by storing up-to-date pricing and availability information. Other solutions can even create and send quotes automatically based on information from the request, along with data in your system. With these tools, you can beat your competitors to the punch to boost customer satisfaction and win more business.

Showcase Automation's Impact on Customer Experience

Automation doesn't just look good to your shippers— it also provides them with an elevated experience. When you implement automated processes in your operations, you can provide your shippers with faster support, greater accuracy, and better crisis management.

Not only will this lead to happier customers, but it can also yield quantifiable results like lower customer service response times, higher on time in full (OTIF) rates, and reduced detention and demurrage fees.

As you see improvements from your new technology, you can start to incorporate the data into your sales presentations. When you combine the benefits of automation with your industry connections and expertise, you'll provide more value to stand out from the competition.

The logo for Logixboard, featuring the word "LOGIXBOARD" in a bold, white, sans-serif font. To the left of the text is a stylized graphic consisting of several thin, white, curved lines that form a partial circle or a series of concentric arcs, suggesting a globe or a network.

With Logixboard, real-time exceptions alerts, shipment notifications, and in-app messages keep you and your customer informed in real-time, eliminating back and forth emails and phone calls.

Aids in Employee Retention Strategies

To build a competitive workforce in this landscape, you'll need to cater your company offerings to younger talent. Implementing modern technology like automation is a major piece in this puzzle. By digitizing your work environment, you can prevent burnout, emulate day-to-day tech solutions, and demonstrate your plans to grow and develop your employees.



KEY AUTOMATIONS:

Document Creation Automations, Data Entry Automations, Workflow Automations

Discourage Burnout by Reducing Repetitive Tasks

Workplace burnout is most often associated with excessive workloads and unrealistic expectations. However, it can also come from spending too much time on tasks that are too “easy.”

In a [Harvard Business Review piece](#) about stress and burnout, author Jennifer Moss talks about monotony's negative effects on morale, as well as its connection to “repeatable and predictable” tasks. Moss also cites a [Korn Ferry survey](#) of nearly 5,000 professionals, which identified boredom as the top reason employees listed for seeking a new role.

By allocating repetitive tasks to automation, you can free up time for your employees to tackle higher-value work. In dedicating more energy to complex responsibilities like negotiating rates with carriers or managing customer crises, they'll get more opportunities to leverage their individual strengths— leading to greater job satisfaction.

At the same time, you can program automation to handle simpler steps, such as data transfer, document creation, and delivering updates or alerts. In addition to providing more personalized value to your customers, it also gives your team greater autonomy to manage more interesting projects.

LOGISTICS LABOR STATS

As with many industries, many logistics companies are undergoing the issue of an aging workforce.

According to data from the [U.S. Bureau of Labor Statistics](#), 45% of employees in transportation and warehousing are 45 or older.

This trend exacerbates the effects of post-pandemic labor shortages, putting the people-centric forwarding industry in a tough position.

While solving recruitment issues in the shipping industry is a complex challenge, individual companies can take steps to grow and strengthen their workforce. By launching early career programs, refining their environment and policies, and adopting new digital solutions, they can become a top choice for new grads.

[Read more.](#)



"Icon made by Freepik from [www.flaticon.com](#)"

Fit the Digitization Seen in Our Daily Lives

In the past few years, the level of technology in our day-to-day lives has progressed at a rapid pace. Just think - in one day, you can schedule an Uber to drive you to the airport, ask Siri to track your location and alert your ride when your plane touches down, and order Postmates to be waiting at the door when you arrive.

With all of these modern advancements available at our fingertips, it can be frustrating to transition to more manual processes upon entering the workplace. Especially for younger generations, working on outdated systems can feel like a step backward. As professional tasks become more monotonous over time, this can even drive them to transition to companies with more up-to-date technology.

Demonstrate Your Company's Prioritization of Continued Growth

Hiring top talent is never easy, and the shifting priorities of each generation make it even trickier. In a [2022 study by Deloitte](#), they found that “learning and development opportunities” ranked second on Gen Z and Millennials’ reasons they work for their current employer— beating out compensation, culture, career progression, and more.

Proficiency in digital tools is a must-have in today’s labor market. Therefore, growth-focused candidates will seek out employment opportunities that give them a chance to learn the latest technologies in the field. By implementing a powerful tech stack, you’re not only showcasing your company’s pursuit of growth, but also your commitment to developing your employees.

The logo for Logixboard, featuring the word "LOGIXBOARD" in a bold, white, sans-serif font. To the left of the text is a stylized graphic of a blue square with a white grid pattern, resembling a circuit board or a digital interface element.**LOGIXBOARD**

Customers can upload/download shipment documents on Logixboard. Documents sync with your TMS in real-time, while automatic notifications alert you and your customers anytime a new document is uploaded.

Streamlines Your Technology Stack

Utilizing each layer of your technology stack to its full capabilities is only possible when automations are in place to seamlessly integrate the experience for your team and customers.



KEY AUTOMATIONS:

Integration Automations, Notification Automations

Utilizing automation can increase your compatibility with important technology partners (e.g. [customer experience](#), analytics, and [TMS](#) partners). Integration automations allow your technology stack to work together in harmony. Currently, there isn't a one size fits all or one digital partner solution for all the capabilities freight forwarders are looking to strengthen their customer offerings and internal operations. Without connectivity automation, freight forwarders would not be able to diversify their stacks and send vital data and commands from different systems. On CargoWise, [outbound integration triggers](#) allow qualified events to send data to other integrations, like Logixboard, to amplify the use of that data for visibility, customer experience, and more. When you are using automation, your business will increase the ROI of technology and digital partners by ensuring as much of their capabilities are used as possible to impact overall performance.

**LOGIXBOARD**

We integrate in as few as 10 days.

Our expert integration team does nearly all the work for you and your team. You can go as quick or as slow as you want. Whatever it is. We will be there for you.

Your technology stack will be different from some of your competitors and focus on alternative automation than some digital forwarders, but it should. Freight forwarding [technology stacks need to satisfy a baseline](#) of expected capabilities, but after meeting them, they should reflect your operation's personal goals and needs. Your team of industry experts and unique SOP should guide you to digital partners that will make sense for how you run your business.

Final Thoughts

For freight forwarders, a time and financial commitment to setting up automations throughout their operational workflows and customer facing offerings can give the edge needed to compete and win against digital forwarders. Furthermore, the automations can amplify the return seen on technology and digital partners to improve their bottom line.

Traditional forwarders have the logistics industry knowledge, trained professionals, and the experience of providing individualized service to shippers/BCOs that newer digital forwarders can not compete with. Digitizing and implementing automation now levels up those freight forwarders to offer their customers an unmatched experience from beginning to end, over and over again for their shipments.

To dive deeper into the automation capabilities of CargoWise, check out the latest Logixboard Insider webinar recording “[5 Ways to Maximize Automation Capabilities in CargoWise](#).” If you want to hear more about automation specifics of an alternative TMS, let us know [here](#).

