

CRM for Transport & Logistics

Adding Value with Salesforce



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Salesforce for Logistics

Leveraging the World's Leading CRM



In today's competitive environment, Salesforce automates operations and enables real-time tracking of shipments, improving visibility across the supply chain. Its analytics provide insights to optimise routes, reduce costs, and improve delivery times.

With Salesforce's powerful suite of tools, distributors can focus on what matters most: efficient, reliable, quality service. Embrace innovation and ensure your organisation not only meets today's demands but outshines future competition.

Core Benefits



Swift and Accurate Service

Serve customers by having access to the right data in real time.



Effective Decision-Making

Optimise routes, manage inventory, and reduce costs.



Improved Tracking and Accountability

Minimise errors, reduce lost goods, and streamline distribution.



Enhanced Customer Acquisition

Automate lead management and quotations.

SUCCESS WITH SALESFORCE


29%

Increase in Productivity
with Sales Cloud

(Salesforce, 2022)


32%

Increase in Customer Satisfaction
with Service Cloud

(Salesforce, 2022)


-27%

Reduction in Support Costs
with Service Cloud

(Salesforce, 2022)


-25%

Reduction in IT Costs
with Salesforce Platform

(Salesforce, 2022)


-28%

Customer Acquisition Costs
with Marketing Cloud

(Salesforce, 2022)

The Facts

Why Salesforce for Logistics?

#1
Salesforce #1 ICD CRM
12 Years Running
(IDC, 2024)

90%
Fortune 500 Using
Salesforce
(Salesforce, 2024)

£6.69

On average, for every £1 invested in a CRM, companies earn back £6.69.

Nucleus Research (2019)

of customers would switch to a competitor following a poor customer service experience.

41%

UK Institute of Customer Service (2024)

Only 53%

of logistics professionals surveyed felt confident in their business growth (down 1.5% from 2023).

Logistics UK (2024)

transport and logistics companies collapsed in 2023, nearly double the number in 2022.

500

Logistics UK (2024)

Institutions are under more pressure than ever to deliver fast, exceptional service at low cost due to rising customer expectations, booming e-commerce channels, global supply chain disruptions, and intense competition. At the same time, fuel prices and labour shortages drive operational costs higher. Companies must balance these challenges while maintaining efficiency, optimising routes, and reducing delays.

To stay competitive, institutions must adopt cutting-edge technology and innovative strategies to improve speed and reduce costs effectively. Effective CRM platforms provide businesses with up to:

38%
faster, more informed
decision-making.

25%
average increase in
revenue.

30%
increase in lead
conversion.

Solving Industry Challenges

How the Salesforce suite supports Logistics Companies



Salesforce is not just a CRM, and certainly not just for Sales. Leading organisations leverage the top CRM's extensive suite of tools to solve any challenge, whether it be route optimisation, providing dynamic pricing, reducing operational costs or tracking assets.

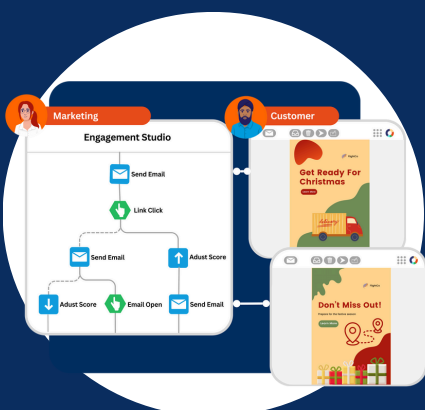


Sales Cloud for Transport and Logistics

- Track leads, automate workflows, and manage sales opportunities
- Automate routine tasks such as follow-ups, quote generation, and contract management
- Make data-driven decisions to optimise routes, reduce delivery times, and improve profitability
- Maintain a 360-degree view of each customer, including interactions, preferences, and history

Service Cloud for Transport and Logistics

- Offer multi-channel, real-time support and case management
- Dispatch delivery personnel and track fleet maintenance
- Promote self-service for clients to track shipments, raise service requests, and get updates on delivery schedules without needing to contact support teams
- Leverage data to improve service quality and predict potential issues before they escalate

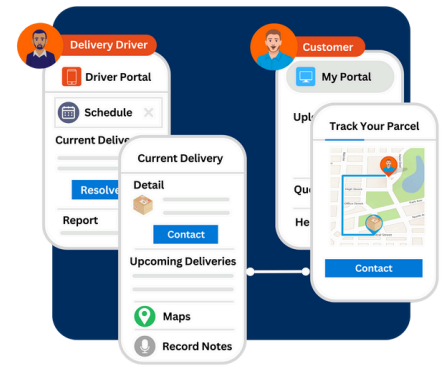


Marketing Cloud for Transport and Logistics

- Create automated, personalised multi-channel campaigns
- Optimise marketing strategies, target new market segments and make informed decisions
- Automate email notifications, SMS updates, and targeted ads
- Engage with customers on their preferred channel, providing multiple touchpoints

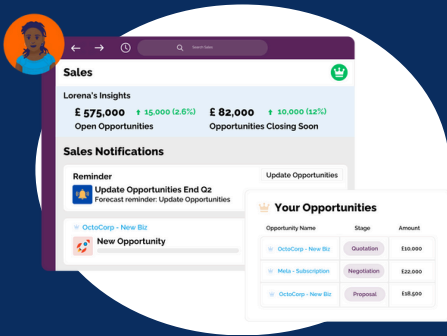
Experience Cloud for Transport and Logistics

- Create personalised portals where customers can track shipments, request support, and access important information
- Collaborate with suppliers, distributors, and other stakeholders
- Foster collaborative spaces where field service agents, dispatchers, and customer service teams can share data documents, and updates in real-time
- Allow clients to access dashboards displaying their shipment history, preferred routes, and tailored service options



Slack for Transport and Logistics

- Reduce siloes with instant communication among dispatchers, drivers, and operations staff or externally with partners and suppliers
- Set up real-time notifications for important updates, such as shipment delays, route changes, or inventory levels
- Automate workflows, pull data into Slack channels, and streamline processes without switching between different platforms



Seamlessly connect applications, data, and devices through an intuitive integration platform, enhancing operational efficiency and accelerating digital transformation. With its robust API management capabilities, **MuleSoft** allows businesses to unlock and share data across systems, driving innovation and reducing IT support costs.

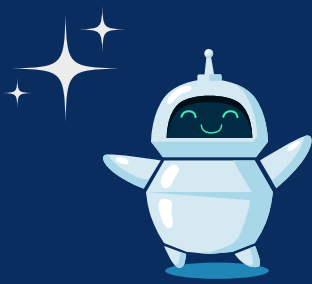


Unify and manage customer data in real-time, enabling personalised experiences and data-driven decision-making. With its advanced analytics and AI capabilities, **Data Cloud** empowers businesses to gain actionable insights, enhancing customer engagement and driving growth.



Visualise and analyse data through intuitive, interactive dashboards that make insights accessible to everyone. With its powerful analytics capabilities, **Tableau** enables users to uncover trends, make informed decisions, and drive business performance, regardless of their technical expertise.





Get Started with Agentforce

[Learn More](#)

Take your efficiency to new heights with Salesforce's autonomous AI layer, Agentforce. Support customers, schedule deliveries, generate new leads and more, all with reliable, secure and flexible virtual assistants.

Our Agentforce Packages



Readiness Session

Not quite sure where to start? Get advice from our experts, lay the foundations for your specific AI use cases and create your bespoke roadmap to success with Agentforce.



Internal Agent Quick-Start

The Internal Agent Quick-Start is designed to help your teams to achieve their goals. These agents can help to qualify applications, curate responses and stay on top of your cases!



Customer Agent Quick-Start

This package helps businesses provide top-tier service and personalised experiences. Enlist agents to schedule appointments, amend bookings or tackle complex queries.

Why Performa IT?

Performa IT is the first Salesforce partner to have actively implemented Agentforce in the official UK pilot!

£150k

Est. Annual Saving

40%

Est. AI Case Resolution

'What do I need to implement Agentforce?'

- For customer-facing agents, Messaging for In-App and Web Setup is required.
- To implement an effective Service Agent, at least 100 Knowledge Articles are required for setup.

Why Performa IT?

400+
Projects

5* Rating
On Appexchange

80+
Certifications

30+
Industries



Sales



Service



Field Service



MuleSoft



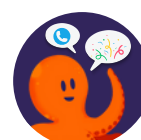
Marketing



Experience



Data



Slack



Commerce

“Our go-to team”



“Absolutely Trusted”



“Second to None”



81%

Conversion Increase

with Sales Cloud

37%

Cost Reduction

with Service Cloud

75%

Efficiency Increase

with Exp. Cloud

50%

Efficiency Increase

with MuleSoft

25%

Productivity Increase

with Field Service

40%

Est. Cost Reduction

with Agentforce

[View Case Studies](#)



Thank you!

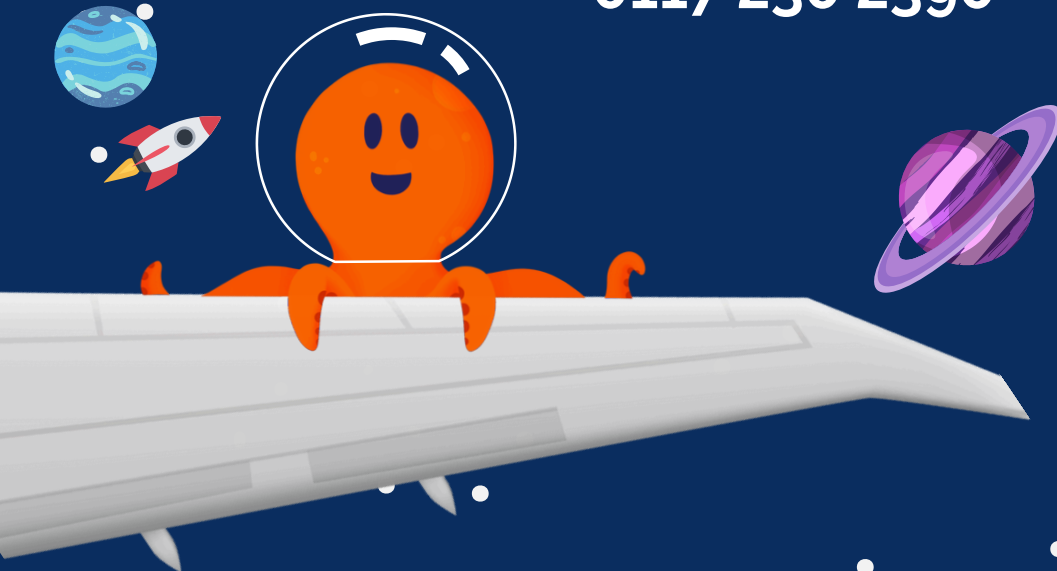
Want to learn how we can help you
grow your business?

Book a consultation with us
today!



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