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Company Name:

Ocean transworld



Your Role in Business

Director



How long have you been in freight forwarding business?

5+ years



What Services do you offer? (Select all that apply)

Import freight forwarding

Export freight forwarding

Customs clearance

Transportation/logistics



How many shipments do you process monthly on average?

100-200



How many people are currently handling the workflow you shared (40 steps)?

3-4



On average, how long does it take from customer inquiry to final delivery completion?

4-6 weeks



Which of these 40 steps consume the most time for your team? (Select top 3)

Rate sourcing from agents (steps 3-5)

Customer follow-ups (steps 8-9)

Documentation handling (steps 11-14)



What's the biggest operational challenge you face today?

It's time consuming



Where do most errors occur in your current process?

Documentation (wrong details in HBL/MBL)




How do you currently manage your shipment data?

Excel spreadsheets




What happens when an agent doesn't respond to your rate inquiry on time?

Send reminder

 On average, how long does it take to collect payment from clients?


30-45 days

 Do you currently use any automation tools or software?


Yes

 Specify what kind of automation do you use. (in short)

It's ERP

 What email system do you use?

Gmail (Google Workspace)


 What's your primary goal with automation? (Select top 2)

Scale business without hiring more people


Reduce documentation errors

 What does success look like for this project 3 months after implementation?

We r trying it donno success ratio

 When do you need this automation system running?

Within 1 month

 What's driving the urgency (if any)?


Business growth/scaling

 Have you allocated budget for automation?

Not yet, exploring options first

 Who else will be involved in the final decision?

Me + business partner(s)

 What's your typical timeline for making purchasing decisions like this?

Less than 1 week

 Have you evaluated other automation solutions or consultants?

Yes, currently evaluating multiple options

 Is there anything specific about your workflow that we should know before Monday's call?

Have shared you entire flow we expect you to come with the solution



What questions do you want answered on our call ?

Is it possible if yes time line & cost



Ending

A. Thanks for your response!



Response ID

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1 selected