Customer self-service logistics portal: a complete solution

Empowering corporate clients with real-time shipment visibility and document access while reducing support team workload

Why we need a self-service logistics portal

Corporate clients currently face delays accessing shipment data and documents through manual processes.

Support teams spend excessive time on routine queries that could be automated.

Digital self-service would reduce workload by 40% while improving customer satisfaction.

Business objectives driving this initiative

Visibility

Improve shipment tracking

Enhance transparency and minimize escalations through real-time tracking capabilities and proactive notification systems.

Retention

Enhance client satisfaction

Boost client loyalty and reduce churn through implementation of digital self-service options that empower customers.

Data

Enable informed decisions

Leverage operational data analytics to identify improvement opportunities, optimize processes, and measure performance outcomes.

Efficiency

Reduce manual operations

Decrease workload by 40% through automation and streamlined processes, enabling staff to focus on higher-value activities.

Key user needs this portal addresses

Documents

On-demand downloads

Access critical documentation including AWBs, PODs, and invoices 24/7 without waiting for assistance or email responses.

Requests

Simple submission

Submit and track service requests directly through the portal, eliminating email dependencies and streamlining communication.

Resolution

Self-service solutions

Resolve issues independently without requiring manager intervention, saving time and increasing operational efficiency.

Real-time

Instant access

Gain immediate visibility into your shipment status and location information in real-time, whenever you need it.

Core functionality for the MVP launch

Search

Shipment listing interface

Comprehensive search functionality allowing users to locate shipments quickly using multiple filtering options.

Tracking

Real-time monitoring

Live status updates with detailed timelines and immediate access to shipment-related documentation.

Support

Service request system

Integrated support functionality enabling users to submit service requests directly connected to specific shipments.
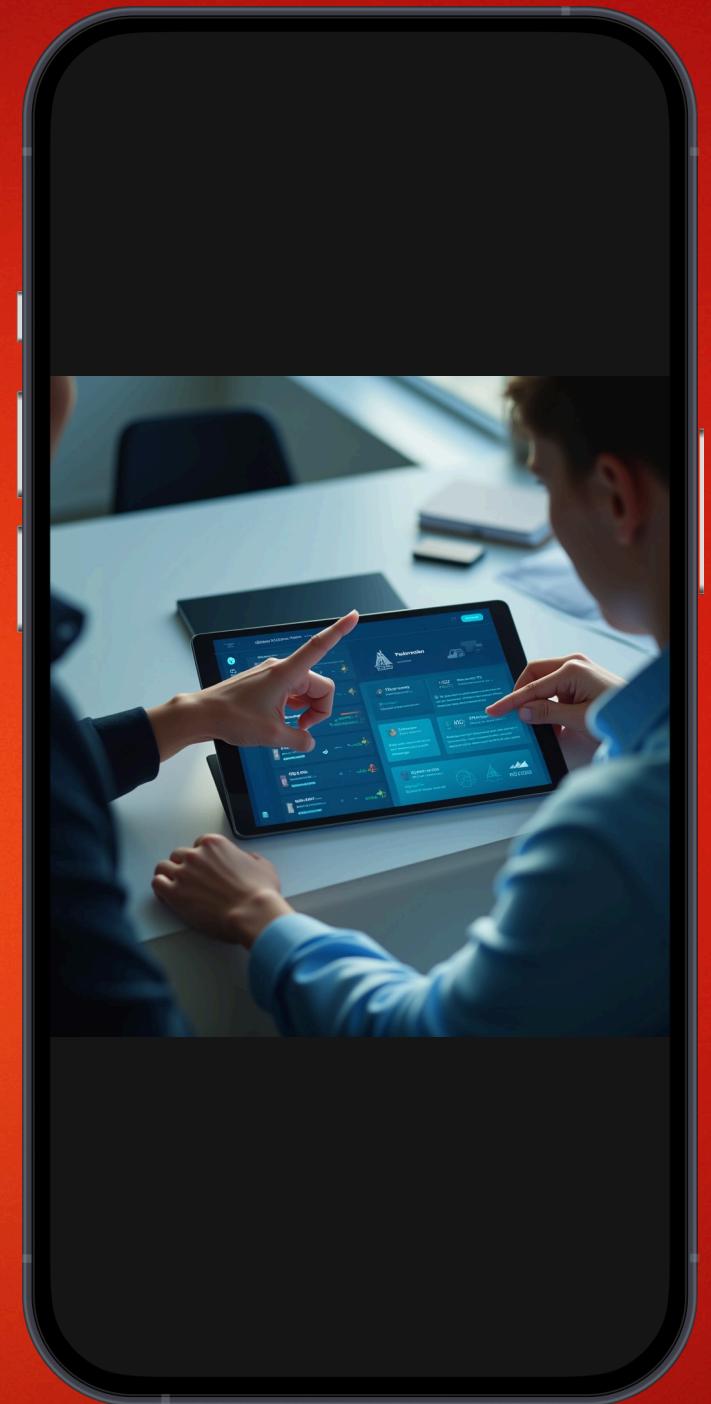
Security

User login controls

Robust authentication system with role-based permissions ensuring appropriate access levels for different user types.

Overview

The customer journey through our portal

Users navigate from onboarding to dashboard features and shipment tracking.

How we'll measure success with key metrics

Self-service

Query resolution rates

Success will be measured by the percentage of customer queries successfully resolved through the portal without requiring support intervention.

Efficiency

Support ticket metrics

We'll monitor the reduction in manual ticket volume and improvements in response times as indicators of operational efficiency.

Satisfaction

Customer feedback trends

Quarter-over-quarter improvements in customer satisfaction scores and Net Promoter Score will demonstrate increasing customer loyalty.

Adoption

Corporate portal usage

We'll track the percentage of corporate customers actively using our self-service portal to gauge implementation effectiveness.

The technical implementation focuses on creating a robust integration system with existing business solutions. RESTful APIs will connect to existing TMS/ERP systems, ensuring seamless data flow between platforms. A comprehensive user management service will be implemented with role-based access control, providing appropriate system access based on user responsibilities and permissions.

The solution includes a responsive web application specifically optimized for desktop use, ensuring an excellent user experience for office-based staff. Secure document storage with permission-based access will be implemented to safeguard sensitive information while allowing authorized personnel to access necessary documents as required.

Phased development approach with strategic implementation timeline

Enhancement

User experience

Phase 2 (Week 4) focuses on adding service requests, implementing notifications system, and developing robust user management capabilities.

Validation

Quality assurance

Phase 3 (Week 4) conducts User Acceptance Testing with pilot clients, develops help content, and addresses any identified bugs or issues.

Expansion

Future development

Future scope includes real-time carrier integration, custom dashboards, and mobile application development to enhance functionality and accessibility.

Foundation

Core functionality

Phase 1 (Weeks 1-3) establishes essential features including shipment tracking, document downloads, and comprehensive user onboarding processes.

Expected impact on customer experience for corporate clients

Corporate clients gain instant access to shipping information without delays. Support teams can focus on complex issues rather than routine queries.

Client satisfaction increases through faster resolution times. Digital experience positions the company as tech-forward and customer-centric.

Assumptions and key tradeoffs for implementation

MVP

Time-to-value focus

MVP prioritizes rapid time-to-value over deep customization features, ensuring quicker deployment and immediate benefits for users.

Support

Team redundancy

Some redundancy with support team expected during adoption phase as users transition to the new system and processes.

Onboarding

Legacy assistance

Legacy clients may require personalized onboarding assistance to ensure smooth transition and maintain satisfaction during implementation.

API

Data fidelity

Existing APIs provide sufficient data fidelity for core functionality, allowing us to build upon current infrastructure without modifications.