Custom CRM System Proposal for Auto Transport Brokering

1. Industry Overview: Auto Transport Brokering

The auto transport brokering industry connects customers who need vehicles transported with carriers responsible for physical transport. Brokers manage the coordination between customers and carriers, including communication, pricing, and logistics. Brokers oversee the entire process, from providing quotes to assigning carriers and managing payments.

Key Stakeholders:

- **Brokers**: Manage customer relationships, secure pricing, and coordinate transport between customers and carriers.
- **Carriers**: The companies or individuals responsible for transporting the vehicles, usually through a bidding process on load boards.
- **Customers**: Individuals or businesses needing vehicle transport, including private car owners, dealerships, auctions, and manufacturers.

Auto Transport Process:

1. **Customer Inquiry**: The customer contacts a broker for a quote.
2. **Quote Generation**: The broker generates a price estimate based on the vehicle type, distance, transport method, and vehicle status.
3. **Carrier Assignment**: The broker posts the job on load boards (e.g., Super Dispatch) for carriers to bid on.
4. **Payment Upon Dispatch**: Payment is collected when a carrier is assigned, rather than upon delivery. This improves efficiency and reduces the burden of cash-on-delivery transactions.
5. **Vehicle Transport**: The carrier picks up and delivers the vehicle, while the broker manages communication.
6. **Completion**: The transport is completed when the vehicle is delivered. Final payment (if any) is often in cash or certified check, but this CRM will offer multiple payment methods for flexibility.

Industry Challenges:

- **Outdated Payment Methods**: Cash-on-delivery is common but inconvenient. Our CRM will provide flexible payment methods, including credit cards and digital wallets.

- **Manual Processes**: Many brokers still rely on manual processes to track quotes, dispatches, and follow-ups.
- **Limited CRM Customization**: Existing CRMs are not tailored to the auto transport industry, lacking integrations with load boards and tools like Super Dispatch.

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2. Custom CRM Proposal

We propose building a **custom CRM system** specifically designed for auto transport brokering. The CRM will automate key processes, improve payment handling, and integrate with third-party platforms like Super Dispatch, RingCentral, and Google Maps. This system will enable brokers to manage quotes, follow-ups, orders, and dispatch inquiries more efficiently.

Objectives:

1. **Automate Workflows**: Automate quoting, follow-ups, dispatches, and payment processes.
2. **Integrate with Key Tools**: Seamless integration with Super Dispatch, RingCentral for communication, and Google Maps for route calculation.
3. **Flexible Payment Options**: The system will offer multiple payment methods to reduce the reliance on cash-on-delivery.
4. **MVP Approach**: Build an MVP with essential features that can scale into a full SaaS product.

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3. Key CRM Features

1. Quote Management

- **Automated Quote Generation**: Quotes will be generated automatically from lead providers and the landing page through API integrations.
- **Manual Quote Creation**: Salespeople can manually create quotes if necessary.
- **Key Data Fields**: Customer details, vehicle details (year, make, model), pickup and drop-off locations, pricing (Carrier Pay: 70%, Broker Pay: 30%), transport type (open or enclosed), and vehicle status (running or inoperable).

2. Follow-Up Management

- **Automated Follow-Ups**: The CRM will automatically create follow-ups after customer interactions, tracking progress until the quote converts to an order or is archived.

3. Order Management

- **Order Creation**: Orders are created from quotes and automatically posted to Super Dispatch for carriers to bid on.
- **Status Tracking**: Orders will move through statuses (Posted, Dispatched, Picked Up, Delivered), with all actions logged.

4. Payment Management

- **Payment Upon Dispatch**: Payment will be collected when a carrier is assigned to the transport, avoiding cash-on-delivery issues.
- **Multiple Payment Options**: The system will offer credit card, ACH, and digital wallet options to provide flexibility for customers.

5. Dispatch Inquiry Dashboard

- **SMS and Email Communication**: Brokers will communicate directly with carriers through SMS and email using RingCentral. Carriers can confirm availability and provide relevant details.
- **Automated SMS/Email Replies**: When a carrier responds, they receive an auto-reply SMS and email for further instructions.

6. Carrier Database

- **Carrier Profiles**: The CRM will store carrier details, including insurance records, contact information, and order history, to ensure reliability for future jobs.

7. API Integrations

- **Google Maps**: Calculate distances for vehicle transport.
- **Super Dispatch**: Post jobs directly to load boards for carrier bidding.
- **RingCentral**: Handle SMS and email communications.
- **Stripe or Mercury**: Process payments securely.
- **SendGrid**: Automate email communications for both customers and carriers.

8. Reporting System

- **Performance Metrics**: Managers will be able to track key performance indicators such as conversion rates, total orders, and profit.
- **Custom Reports**: Reports can be generated based on daily, weekly, monthly, or custom time ranges.

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4. Twilio-Powered Power Dialer Integration

A key component of the CRM will be the integration of a **Twilio-powered power dialer**, allowing for efficient outbound call management and automated communications at the conclusion of each call.

Power Dialer Features:

1. **Batch Call Management**: Brokers can select records (e.g., New Quotes, Follow-ups) and call them sequentially using Twilio's API.
2. **Automated Disposition Handling**: After each call, brokers can select a disposition (e.g., Follow Up, Archive), which will trigger:
   - **SMS and Email Automation**: The associated SMS and email templates will be sent automatically based on the disposition selected.
   - **Record Management**: The quote will be automatically moved to the appropriate table (e.g., Follow-Up Table) for further action.
3. **Voicemail Automation**: If the call reaches a voicemail, Twilio's Answering Machine Detection (AMD) will automatically drop a pre-recorded voicemail message and trigger the corresponding SMS and email.
4. **Follow-Up Scheduling**: The system will automatically schedule follow-up calls or tasks based on the disposition chosen.

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5. Design and User Interface Considerations

The CRM's interface will be designed for **simplicity and functionality**. Key design elements include:

- **Main Dashboard**: Display new quotes, follow-ups, and orders.
- **Real-Time Updates**: All data will be updated in real time to ensure brokers have the most current information.
- **Power Dialer Interface**: Allow brokers to manage batch calls and view call progress, with one-click dispositions to trigger automated follow-ups.
- **Folder System**: Organize quotes, follow-ups, and orders into categorized folders for easy management.

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6. Entity Relationship Diagram (ERD)

The following entities and relationships will be mapped in the CRM:

1. **User**:
    ○ Attributes: UserID (Primary Key), Name, QuoteID (Foreign Key), CreatedDateTime, LoginTimes.
2. **Quote**:
    ○ Attributes: QuoteID (Primary Key), Customer Name, Phone, Email, Pickup City, Pickup State, Pickup Zip, Dropoff City, Dropoff State, Dropoff Zip, Vehicle Type, Total Price, Carrier Pay, Broker Pay, Transport Type, Vehicle Status, CreatedDateTime.
3. **Order**:
    ○ Attributes: OrderID (Primary Key), QuoteID (Foreign Key), Order Status, Pickup Date, Dropoff Date, Payment Method, Contact Information.
4. **Carrier**:
    ○ Attributes: CarrierID (Primary Key), Carrier Name, Insurance Records, Driver Contact Information, Order History.
5. **Dispatch Inquiry**:
    ○ Attributes: InquiryID (Primary Key), OrderID (Foreign Key), Inquiry Date, Communication Type (SMS/Email), Response Status.

CRM Layout Design: Main Screen, Tables, Dashboards, and Menus

This section outlines the structure of the CRM system, focusing on the **Main Screen** (Sales Dashboard and Dispatch Dashboard), detailed functionality for the **Individual Quote Dashboard**, and the **Search Bar** feature for locating records and detecting duplicate entries. It also includes the process for converting quotes to orders, automating communication, load posting, carrier job acceptance, dynamic pricing calculations, and a discussion about the quote software integration options.

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1. Main Screen

The **Main Screen** serves as the central workspace for brokers, featuring two key dashboards: the **Sales Dashboard** for managing quotes, follow-ups, and orders, and the **Dispatch Dashboard** for tracking booked orders. The Main Screen also includes a **universal search bar** for quickly locating records and detecting duplicates. Additionally, it provides easy access to clocking in/out, reporting, starting new quotes, and other key features.

Main Screen Structure:

- **Sales Dashboard**:
    ○ **New Quotes**: Real-time tracking of all new customer inquiries.
    ○ **Follow-Ups**: Active follow-ups that have been engaged with but not converted into orders.
    ○ **Orders**: Active transport orders that have been confirmed.

Real-Time Numeric Values for Sales Dashboard:

- **Critical Requirement**: All quotes in **New Quotes**, **Follow-Ups**, and **Orders** must display a **real-time live numeric value** on the screen at all times. These numeric values reflect the actual number of records in each category and update dynamically in real-time as new records are added or moved to different stages. This ensures brokers can instantly monitor how many quotes and orders are active in each category.
- **Dispatch Dashboard**:
  - Real-time tracking of all booked orders, categorized by their current status. All statuses on the Dispatch Dashboard display **live numeric values**, updating in real-time to show how many orders are in each category.

Entry Points on the Main Screen:

- **Clock In/Clock Out**: A button for brokers to clock in and out at the beginning and end of their shifts, allowing tracking of work hours and shift management.
- **Reporting**: A direct entry point to access the **reporting system**, where brokers and managers can view performance metrics such as conversion rates, total orders, profits, and call statistics. Reports can be filtered by daily, weekly, monthly, or custom time ranges.
- **Start New Quote**: This button opens a **blank form** for brokers to manually enter new quotes. While quotes are typically automated via API integrations, manual entry is useful for walk-ins, phone inquiries, or special cases.

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2. Quote Record Lifecycle and Dynamic Pricing

Each quote record in the CRM can only exist in one of the three tables at any given time: **New Quotes**, **Follow-Ups**, or **Orders**. The transitions between these stages follow a specific lifecycle, and all quotes and orders will be assigned pricing using an internal **quote algorithm**.

Quote Algorithm:

- I have several options for **quote software integration**, which can be discussed. I do not require you to build this element, but it is important that the software seamlessly integrates into the CRM.
- **Pricing Calculation**: The selected quote software will include an **automated pricing algorithm** that calculates the cost of each shipment based on:
  - **Distance** between the pickup and dropoff locations, calculated automatically via the **Google Maps API**.
  - **Vehicle Type Dimensions**: The system will categorize vehicles into **car**, **SUV**, **truck**, or **oversized**, and factor in these dimensions when calculating the price.

- **Instant Price Generation**: As soon as a quote is created or entered into the CRM, the algorithm will automatically generate a price for the shipment. This ensures that brokers can instantly provide customers with accurate quotes without manual calculations. The pricing includes both **Carrier Pay** (70%) and **Broker Pay** (30%).

Convert to Order Process:

- **Convert to Order** is accessed through the **Individual Quote Dashboard** and opens as a **separate screen**. When converting a quote to an order, the system will **populate information from the previous quote screen**, such as customer details and vehicle information.
- On this separate **Convert to Order** screen, brokers will:
    - Add the **Pickup Address** and **Point of Contact** information for the pickup location.
    - Add the **Dropoff Address** and **Point of Contact** information for the dropoff location.
    - Store (but not charge) a **Credit or Debit Card** for the customer during the process, ensuring payment information is on file.

Once all necessary details are entered, brokers will hit **Book Order**, triggering the following automations:

- **Automatic SMS/Email**: The system will automatically send the **terms and conditions** to the customer via both SMS and email, notifying them that their order has been booked.
- **Post to Super Dispatch**: The order is instantly posted to **Super Dispatch**, making it visible to carriers who can view and bid on the load. This ensures seamless and efficient carrier assignment.

Carrier Job Acceptance via URL:

- As part of the **Super Dispatch posting**, the system will automatically generate a **URL/Bitly link** in the job posting visible to carriers. This link will allow the carrier to:
    - **Live Chat** directly with brokers via the CRM, enabling quick and real-time communication without the need for back-and-forth phone calls.
    - **View Order Details**: The carrier can click the link to see all the key details for the order they are interested in (pickup/dropoff addresses, contact info, etc.).
    - **Sign Terms and Conditions**: The carrier can sign the required **terms and conditions** digitally.
    - **Accept the Job**: Once terms are signed, the carrier can **accept the job**, and this will automatically update the CRM and Super Dispatch, confirming the carrier for the load.

This feature eliminates the **hundreds of hours** brokers typically spend on the phone with carriers each month, resolving a major inefficiency in the auto transport industry. It streamlines the booking and carrier acceptance process, significantly reducing manual communication and paperwork.

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3. Sales Dashboard

The **Sales Dashboard** tracks the lifecycle of each quote, from the initial inquiry (New Quotes) to customer engagement (Follow-Ups) and into confirmed transport orders (Orders). All tables display **real-time numeric values**, showing the live count of records in each category.

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4. Dispatch Dashboard

The **Dispatch Dashboard** tracks all booked orders. It displays real-time updates on the status of each order, allowing brokers to manage active transport jobs efficiently.

Dispatch Status Categories:

- **Posted**: Orders posted on load boards for carrier bidding.
- **Picked Up**: Orders where the vehicle has been picked up by the carrier.
- **Completed**: Orders that have been successfully delivered.
- **On Hold**: Orders that are paused or delayed due to customer or carrier issues.
- **Late**: Orders that are running behind schedule.
- **Pending Cancel**: Orders pending cancellation.

Each status shows the **live count** of orders, allowing brokers to take quick action when necessary.

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5. Individual Quote Dashboard

The **Individual Quote Dashboard** provides detailed management for each specific quote, follow-up, or order. Brokers can view, edit, and interact with customer or shipment details.

Fields and Features of the Individual Quote Dashboard:

- **Customer Information**:
  - **Name**: Customer’s full name.
  - **Phone Number**: Customer’s contact phone number.
  - **Email Address**: Customer’s email address.

- **Shipment Details**:
  - **Pickup/Dropoff Addresses**: Customer's pickup and dropoff locations.
  - **Ship Date**: The scheduled date for the vehicle to be transported.
  - **Year, Make, and Model of Vehicle**: Detailed vehicle information for accurate quoting and transport arrangements.
- **Pricing Information**:
  - **Total Price**: The full price for the shipment, calculated by the **quote algorithm**.
  - **Carrier Pay**: The portion of the total price paid to the carrier.
  - **Broker Pay**: The portion of the total price retained by the broker.
- **Google Maps Integration**:
  - **Route and Distance Display**: A Google Maps integration shows the route and distance between pickup and dropoff locations.
- **Notes Section**:
  - **Auto-Save Functionality**: Brokers can leave notes about customer interactions, and the system will automatically save them without manual input.
- **Hover Dropdown Menu**:
  - **Template Email and SMS Options**: Brokers can send pre-configured template emails or SMS messages with just a click, using a hover dropdown menu.
- **Convert to Order**: Located within the **Individual Quote Dashboard**, this button allows brokers to convert a quote or follow-up into an order, trigger automation, and move it into the dispatch process.

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6. Search Bar for Record Management

A **universal search bar** is available on the main screen at all times, allowing brokers to quickly search for records by quote number, order number, phone number, or email address.

Search Bar Features:

- **Searchable Fields**:
  - **Quote Number**
  - **Order Number**
  - **Phone Number**
  - **Email Address**
- **Duplicate Detection**: The search bar helps brokers detect **duplicate quote records**. This ensures that existing records can be identified