Smart Logistics & Fleet Tracking CRM

Industry: Logistics / Transportation
Project Type: B2B Salesforce CRM Implementation
Target Users: Fleet Managers, Dispatch Operators, Drivers, Customers

Problem Statement

Logistics companies face challenges in managing fleets efficiently:

- Delayed deliveries due to poor route planning.

- Difficulty tracking vehicle location and fuel usage in real time.

- Manual assignment of shipments to drivers leads to inefficiency.

- Lack of automated alerts for maintenance or compliance checks.

Salesforce CRM Solution:

- Track vehicles and shipments in real-time.

- Assign deliveries automatically to available drivers.

- Automate maintenance reminders and route optimization.

- Provide dashboards for managers to monitor fleet performance, delivery status, and driver productivity.

Use Cases :

Fleet & Vehicle Management

- Track vehicle registration, type, availability, fuel status, and maintenance.

Shipment Assignment & Tracking

- Assign shipments to drivers based on availability and route optimization.

- Track shipment status in real time (picked up, in transit, delivered).

Driver Management

- Maintain driver profiles, license validity, performance metrics.

Maintenance & Alerts

- Automated notifications for vehicle servicing, registration renewal, or fuel low alerts.

Reporting & Dashboards

- Dashboard for completed vs pending deliveries, driver performance, fleet utilization.

- Predictive analytics for maintenance and fuel cost optimization.

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

- Meet Fleet Managers, Dispatch Operators, and Drivers.

- Example: "Fleet Manager wants to see which vehicles are due for maintenance this week."

Stakeholder Analysis

- **Primary stakeholders:** Fleet Managers, Dispatch Operators, Drivers

- **Secondary stakeholders:** Customers, Finance Team, Compliance Officers

Business Process Mapping

- **Current process:** Manual dispatch → phone/email coordination → delayed tracking → delayed maintenance

- **Future process:** Salesforce CRM → automated dispatch, tracking, alerts, and dashboards

Industry-specific Use Case Analysis

- Logistics requires **real-time fleet visibility, delivery monitoring, and predictive maintenance**.

- Manual processes lead to **delays, high costs, and compliance risks**.

AppExchange Exploration

- Explore logistics, fleet management, and route optimization apps.

- Consider integration with GPS/IoT for real-time tracking.