DESCARTES™

BUYER'S GUIDE

What to Look for in a Best-in-class Forwarder Transportation Management System

Introduction

Are you switching platforms to perform shipment management and operational tasks? Are you finding that current logistics technology is not scalable as business need change? Has it become challenging to connect with carriers?

These are the questions that Logistics Service Providers (LSPs) are asking, and many forward-thinking businesses are looking to address these challenges by deploying a Forwarder TMS.

However, not all solutions are the best fit for operations. The goal of this guide is to provide forwarders with valuable information as they explore their buying journey by addressing key pain points, what to look for in a best-in-class solution, and to help them select the best Forwarder TMS for their organization's specific needs.

The guide covers:

A Quick Overview: What Is a Forwarder TMS?

A Forwarder TMS serves as a central platform for logistics service providers to manage operations. Leading solutions should enable the efficient coordination of shipments from origin to destination, facilitate real-time customer tracking, streamline communication between stakeholders, automate customs clearance and shipment management, and provide valuable insights through rich accounting and data analytics. With the technology at the center of operations, forwarders are empowered to make informed decisions and enhance overall logistics operational efficiency.

Determine Your Needs: What Are Your Top Pain Points?

Before delving deeper into what to look for in a Forwarder TMS, it is important to review the top pain points regarding current practices and systems. We have put together a short list of the top challenges that LSPs face:

Disconnected Systems

✓ Using separate systems for accounting, operations, and Customer Relationship Management (CRM) is cumbersome and labor-intensive. A lack of unified systems can cause information silos, require data re-entry, and prevent C-level executives from gauging business and operational performance

Not Scalable

✓ Some Forwarder TMS's do not scale with business needs or only offer a limited set of modules. As forwarders expand, the lack of extensibility in a solution can hold businesses back from offering services that customers expect and can curb efficient operations.

Limited Connectivity

✓ Attempting to digitally connect with carriers, supply chain partners, and agents manually can tie-up critical resources. Given the complexity and number of connections that are required to move freight and the friction of getting information out of systems in easy-to-use formats, forwarders who take a home-grown approach to connectivity may not be as nimble.

Legacy Technology

✓ Using systems housed on an inflexible and aging infrastructure can slow day-to-day tasks. Legacy platforms may also not protect forwarders from cyber threats, ensure data integrity, or only accept outdated data protocols.

Lack of Automation

✓ Forwarders may struggle with technology that does not automate tasks or provide a framework to speed daily day-to-day work. Such platforms may not feature a template-driven workflow, flag exceptions, or require redundant data entry.

Inefficient Technical Support & Training

✓ Customer service may be difficult to access, limited to offshore support teams, staffed by support representatives with rudimentary knowledge of the TMS, or simply be slow to respond. In addition, some technology providers may not provide support after go-live or offer pathways to ensure customer success such as ongoing training and knowledge share sessions.

What Are the Key Features of a Leading Forwarder TMS?

A Single System for Operations

Having a single technology system is a good practice for freight forwarders because it streamlines operations, enhances efficiency, and reduces errors. A unified system integrates various functions such as booking, tracking, documentation, compliance, and invoicing eliminating the need for multiple disparate platforms. This not only improves data accuracy and consistency but also enhances visibility across the supply chain. Additionally, a single system simplifies training for employees, reduces IT maintenance costs, and minimizes the risk of communication breakdowns between departments. By consolidating operations into one platform, freight forwarders can improve customer service, optimize workflows, and gain a competitive edge in the industry.

Scalability

Extensible technology is critical to remain agile as industry standards change, regulations evolve, and to meet changing customer expectations. Innovative technology is not static but should grow with you as you expand. Best-in-class solutions should include options for:

Expert Support

A leading Forwarder TMS should be supported by service desks trained in the latest features of the software. Technical support representatives should possess an in-depth knowledge of forwarding operations from complex shipment movements to the latest compliance initiatives. The right technology partner should also be committed to client success with dedicated Customer Success Managers (CSMs) who guide users through best practices, host learning sessions, and regularly check on performance to ensure users derive maximum utility from the Forwarder TMS.

Multimodal Shipment Management

to coordinate import and export shipments across all modes of transport. The right solution should feature shipment management via a dashboard-driven view to provide employees with a full view of operations and focus their attention on exceptions.

Accounting & Financial Analysis

to take the pulse of business with rich accounting and financial performance analytics. Best-in-class technology should stream operational data into accounting modules and feature sophisticated multi-divisional financial insight.

Shipment Tracking & Visibility

to provide comprehensive customer-facing multimodal visibility with a web-based tracking tool. Leading solutions should deliver insight into the location and status of shipments along their journey and provide customer updates throughout the shipment journey.

Rating & Quoting

to deliver on-demand customer booking and quoting with end-to-end carrier rate management. Modern technology should capture negotiated rates and carrier spot rates and deliver accurate customer quotes including all surcharges and fees while maintaining profit margins.

Reporting & Dashboards

to analyze trends and performance with advanced reporting and statistical analysis. The right solutions should deliver rich reporting on customer bookings, trade lane performance, and track booking patterns over time.

Why Are Advanced Integrative Capabilities Critical for a Forwarder TMS?

Freight forwarders are at the center of the logistics chain. This means that logistics service providers must collect information from customers and supply chain partners and capture that information in internal systems.
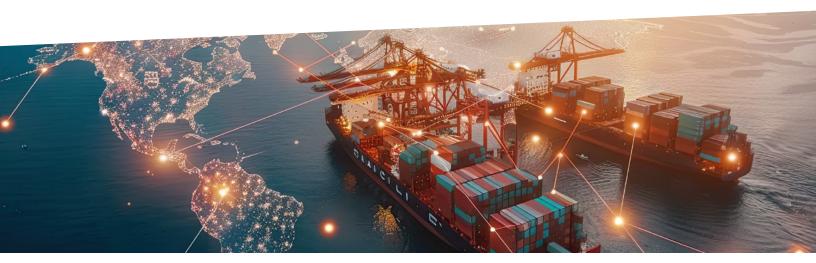
Traditional integration practices are not sustainable in this environment due to the:

- Volume of data that needs to be captured

- Need to parse and validate the information

- Drain on bandwidth away from core activities

A Forwarder TMS should feature real-time data synchronization to populate systems with up-to-date information. A well-integrated system should be a single source of truth for data to drive decision-making and improve communication between departments. The right solution should come preconfigured with nodes to connect platforms and systems to address common integration scenarios and should also enable custom integrations as required.

Leading technology should also:

- Manage and collect carrier rating data and serve it up to customers while considering capacity, routing, and schedule information

- Capture a rich data set of shipment status information from a broad range of carriers to power TMS workflow automations should an exception occur

- Be hosted on a cloud-based framework, feature security checks and balances, and accept data via modern protocols such as Application Programming Interfaces (APIs)

What Automations Should You Look for in a Forwarder TMS?

A leading Forwarder TMS should not only eliminate manual data transfer between systems, but should reduce errors, and speed workflow through smart automations. Digital forwarders view automation as an opportunity to improve productivity and accelerate business growth. The following chart highlights some prime opportunities for automation, common legacy practices, and what to look for in a modern Forwarder TMS.

Automation Opportunity	Legacy Practice	Modern Forwarder TMS
Quoting Customers	Quote customers via email or phone for every shipment	Access rates from connected carriers with a simple port pairing and date range
Customs Clearance	Enter one-off declaration and security filing details or use government portals to connect to government agencies	Use a solution that can automate routine or high-volume clearance work and seamlessly transmit and receive data from government agencies
Documentation	Prepare documents by populating templates or require customers to provide their own documentation	Capture data elements from operational processes, generate documentation automatically, and store the data to meet recordkeeping requirements
Shipment Management	Coordinate shipments by continuously updating internal systems with shipment status details	View and manage all shipments at-a-glance via an integrated, exception-driven dashboard
Accounting	Use separate platforms for shipment management and accounting	Leverage technology that can automatically repurpose shipment data for billing
Customer Visibility	Provide customers with access to a web-based portal that lists their shipment status	Offer a robust customer-facing solution that helps clients focus on shipments by exception and that provides rich status updates
Reporting and Analysis	Use spreadsheet-based reporting to monitor customer patterns and internal performance trends	Use solutions that can offer a deeper level of insight into customer booking, quoting, and rating trends as well as internal performance

Can You Share Customer Success Stories?

A Customs Brokerage: A Success Story of a Customer Achieving Stellar Growth Using Descartes Forwarder TMS

"

We have seen a 25% increase in volume since implementing Descartes TMS. Descartes currently manages 95% of our business operations, and the technology and automation offered by Descartes helped us not only increase the volume of customers but gave us an opportunity to grow our range of services offered. This has helped drive our business to a higher level of operational efficiency and added to our mission of being a cargo concierge.

Read more

Gabriel Rodriguez
President at A Customs Brokerage

Speed Global Services: A Success Story of a Customer Automating Processes to Move Cargo More Efficiently with Descartes Forwarder TMS

SPEED GLOBAL SERVICES

Read more

" The technology's automation, statistical analysis, and recordkeeping have added value for us. For example, the ability to clone similar entry summaries has offered us time saving capabilities and reduced repeated manual data entry. Every click or action that enhances efficiency frees bandwidth for us. Beyond this, the document management enables us to seamlessly maintain our recordkeeping requirements digitally and retrieve documents on-demand.

David Reed
General Manager, International, Speed Global Services

International Freight Forwarder: A Success Story of a Customer Achieving Enhanced Freight Visibility with Descartes Forwarder TMS

" With Descartes TMS, our customers have real-time visibility to their shipments. It's game changing for our operations. It's easy to customize what customers view so they can see key events along their shipment journey. As a result, inbound phone calls and emails are reduced for day-to-day shipment status updates. Employees are freed to build relationships with our customer base and to focus on exceptions to speed freight to its final destination

INTERNATIONAL FREIGHT FORWARDERS

Read more

Chris Lochamy
Director of Strategic Solutions, IFF, Inc

How Does the Buying Process Work?

Descartes is skilled in getting freight forwarders live as quickly as possible to ensure that Descartes Forwarder TMS will benefit operations and the bottom line. Here is what to expect from the buying process:

1
A Discovery Call to Understand Your Requirements
During this conversation, we'll listen to your biggest pain points regarding current back-office technology and determine whether Descartes Forwarder TMS is the right fit for you.

2
A Live Product Demonstration (Virtual)
We take you through a product tour that gives you a transparent view of the features that you would use if you chose our solution.

3
A Solution Proposal & Implementation Timeline
We provide you with a price quote that includes implementation. If you're ready to hit the ground running, we'll build out a clear timeline with milestones to detail how we can get you live as soon as possible.

4
Signing The Agreement & Starting Implementation
By the time you sign, you will have a clear view of what will happen and the results you can expect from Descartes Forwarder TMS

5
Implementation & Go-Live
Our expert implementation team will work with you to implement the solution and train your staff. By the time you reach go-live, your operations team will be ready to use Descartes Forwarder TMS with confidence.

6
Ongoing Support
With Descartes, you're inheriting a solid team that will support you and your business as it continues to grow. Our live customer support team will remain available, providing ongoing attention to ensure things run smoothly.

Conclusion

Descartes Forwarder TMS is transforming how businesses operate. The solution enables efficient coordination of shipments from origin to destination, facilitates real-time customer tracking, streamlines communication between stakeholders, automates documentation processes, and provides valuable insights through rich accounting and data analytics. With Descartes Forwarder TMS in place, forwarders are empowered to make informed decisions and enhance overall logistics operational efficiency

It is our 30+ years of experience, deep domain expertise, understanding of forwarding operations, integrative capabilities, extensibility, expert technical support, and modern IT architecture that sets Descartes Forwarder TMS apart.

We encourage you to carefully weigh the features available to you from the solution, gather your pain points, and contact us to explore if Descartes Forwarder TMS would benefit your operations and your bottom line. For more information, click here for additional resources about Descartes Forwarder TMS to help you continue your buying journey.

About Descartes Systems Group

Descartes (Nasdaq:DSGX) (TSX:DSG) is the global leader in providing on-demand, software-as-a-service solutions focused on improving the productivity, security and sustainability of logistics-intensive businesses. Customers use our modular, software-as-a-service solutions to route, track and help improve the safety, performance and compliance of delivery resources; plan, allocate and execute shipments; rate, audit and pay transportation invoices; access global trade data; file customs and security documents for imports and exports; and complete numerous other logistics processes by participating in the world's largest, collaborative multimodal logistics community. Our headquarters are in Waterloo, Ontario, Canada and we have offices and partners around the world.

Learn more at www.descartes.com and connect with us on LinkedIn and Twitter.

Uniting the People & Technology That Move the World.