



Customer and Employee Experience in the Age of Digital



Forward Looking Statements



This presentation contains forward-looking statements about, among other things, trend analyses and future events, future financial performance, anticipated growth, industry prospects, environmental, social and governance goals, and the anticipated benefits of acquired companies. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, Salesforce's results could differ materially from the results expressed or implied by these forward-looking statements. 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Thank you



Today's Speakers



Bob Hitt

Transportation & Logistics
Industry Advisor
Salesforce



Kathryn Charleston

Solution Engineering Director
Salesforce

The Digital Age Experience

MEET YOUR CUSTOMERS AND EMPLOYEES



Social Media
Money-driven
Ambitious
Travelers
Boundaries
Mobile
Gamers

Digital Experience



From

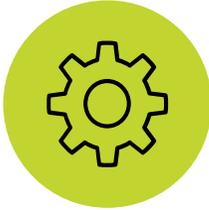


To

Phones & Mainframes



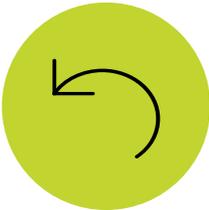
Manual



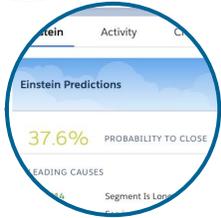
Generic Messaging



Disconnected Processes



Web & Mobile



Intelligent



Personalized



Seamless Processes

IRL Example



salesforce

ELEVATE
TMSA CONFERENCE

CUSTOMER EXPERIENCE

From prospect discovery, marketing actions for brokerage sales





MEET

AMBER

Lambert Inc.



Ad

 **Amber**, read about the latest trends from Omega Logistics. Attend our Webinar on July 20th!

 **Improve OTIF Performance w/ Truckload Shipments Webinar**

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LINKED IN



← → ↻ omega.com

Gain OTIF insights from Omega Logistics

Of all the metrics associated with supply chains, OTIF -- on time and in full delivery -- is the ultimate measure of performance. OTIF is a metric that ties directly to trust in supply chain partnerships and most important of all, customer satisfaction.

Even while logistics providers are navigating change, customers are top of mind. Get the scoop on:

- ▶ Challenges to meeting customer OTIF expectations
- ▶ Best practices for monitoring and measuring OTIF performance
- ▶ Strategies to improve your OTIF performance

SIGN UP



Amber

Dodson

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WEBINAR REGISTRATION



galogistics.com/otifwebinar

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FREIGHT DETAILS

First & Last Name

Email Address

Freight Volumes

Origin ZIP

Destination ZIP

Pickup

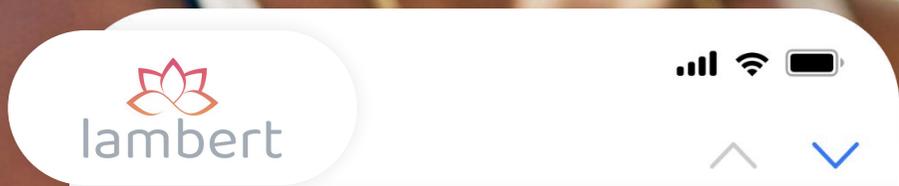
Delivery

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WEBINAR



Omega
To: Amber Dodson



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MEET

MARK

Omega Logistics Broker



Q Search...

Revenue New Business Opportunity Management

Lead **Ms. Amber Dobson**

Company	Title	Phone	Email	Source	Days Since Last Activity
Lambert Inc.	Supervisor	804-988-5412	adodson@gmail.com		

YTD Actuals vs Commit

Key Fields

Title	Supervisor	Lead Score	78
Company	Lambert Inc.	Freight Volume	15 TL per week
Phone	804-988-5412	T&L	Truckload
Email	adodson@gmail.com		

Ship Date (Year-Month)

Year	Month	Actuals	Commit
2021	Jan	15w	15w
2021	Feb	15w	15w
2021	Mar	15w	15w
2021	Apr	15w	15w
2021	May	15w	15w
2021	Jun	15w	15w
2021	Jul	15w	15w
2021	Aug	15w	15w
2021	Sep	15w	15w
2021	Oct	15w	15w
2021	Nov	15w	15w
2021	Dec	15w	15w

LTL - EXP \$21w

LTL - GTD \$21w

Other \$15w

LEAD MANAGEMENT



MegaCorp

Sales Console Leads Omega Inc. Clinh to FL Amber Dobson

Lead Ms. Amber Dobson

Company Lambert Inc. Title Supervisor Phone 804-988-5412 Email adodson@gmail.com Source Days Since Last Activity

Key Fields

Title	Supervisor
Company	Lambert Inc.
Phone	804-988-5412
Email	adodson@gmail.com

Guidance for Success

- Research and contact your new lead quickly.
- Research your lead online.
- Visit their website to learn about their business and industry.
- Look them up on social networks to determine how to best contact a new lead as soon as possible.
- The sooner you contact them, the higher the likelihood of success.
- Verify that their contact information is correct.

Details Marketing Relationship Info

Lead Information

Name	Ms. Amber Dobson	Lead Owner	Darlene Te
Title	Supervisor	Phone	804-988-5412
Company	Lambert Inc.	Email	adodson@gmail.com

Ownership

Lead Ownership Expiration	9/29/2023	Lead Age Counter	
		Prospecting Extension	<input type="checkbox"/>

Segmentation

Lead Source	Marketing Event	Annual Revenue	\$600,000
Industry		No. of Employees	

Phone Notes Report Chart Macros History

VOICE



→ Invoice Past 90 Day... x Amber Dobson x

Ms. Amber Dobson

+ Follow

Company Lambert Inc.
Title Supervisor
Phone 804-988-5412
Email adodson@gmail.com
Source
Days Since Last Activity

Status: New Mark Status as Complete

Key Fields

Title	Supervisor
Company	Lambert Inc.
Phone	804-988-5412
Email	adodson@gmail.com

Guidance for Success

Research and contact your new lead quickly.
Research your lead online.

- Visit their website to learn about their business and industry.
- Look them up on social networks to determine how to best engage and connect.

Contact a new lead as soon as possible.

- The sooner you contact them, the higher the likelihood of converting.

Verify that their contact in

Einstein Scoring

No score is available for this Lead. [More Info](#)

Einstein hasn't calculated a behavior score yet or one isn't available. [More Info](#)

We found no potential duplicates of this Lead.

Monthly Check-ins - Make a call

Call Script

Introductory Call

Hello, my name is _____ and I'm calling from _____. You asked that we contact with more information about our solutions. Do you have a few moments to talk right now?

Activity Chatter Details News

Log a Call Email New Task New Event

Only show activities with insights

Filters: All time • All activities • Logged calls, Email, Events, List email, and

Refresh

Upcoming & Overdue

SALES GUIDANCE



Create a Quote

General Details

Primary Contact: Lauren Bailey
Shipping Address: United States, 1825 4th St, San Francisco, California, 94158
*** Expiration Date:** Jul 2, 2023

Load Details

Trailer Type: dry box van
Load Value: \$60,000
Weight (lbs.): 39,000
Commodity: clothing

Load Pickup Information

Load Pickup Date Time: 6/26/2023 12:00 PM
Origin Pickup City, State: San Francisco, California

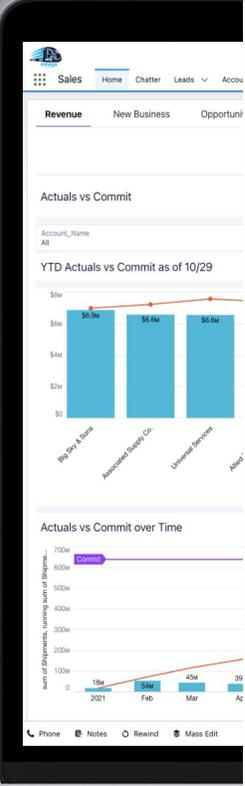
Load Delivery Information

Final Stop Delivery Date Time: 6/28/2023 12:00 PM
Final Delivery City, State: Phoenix, AZ

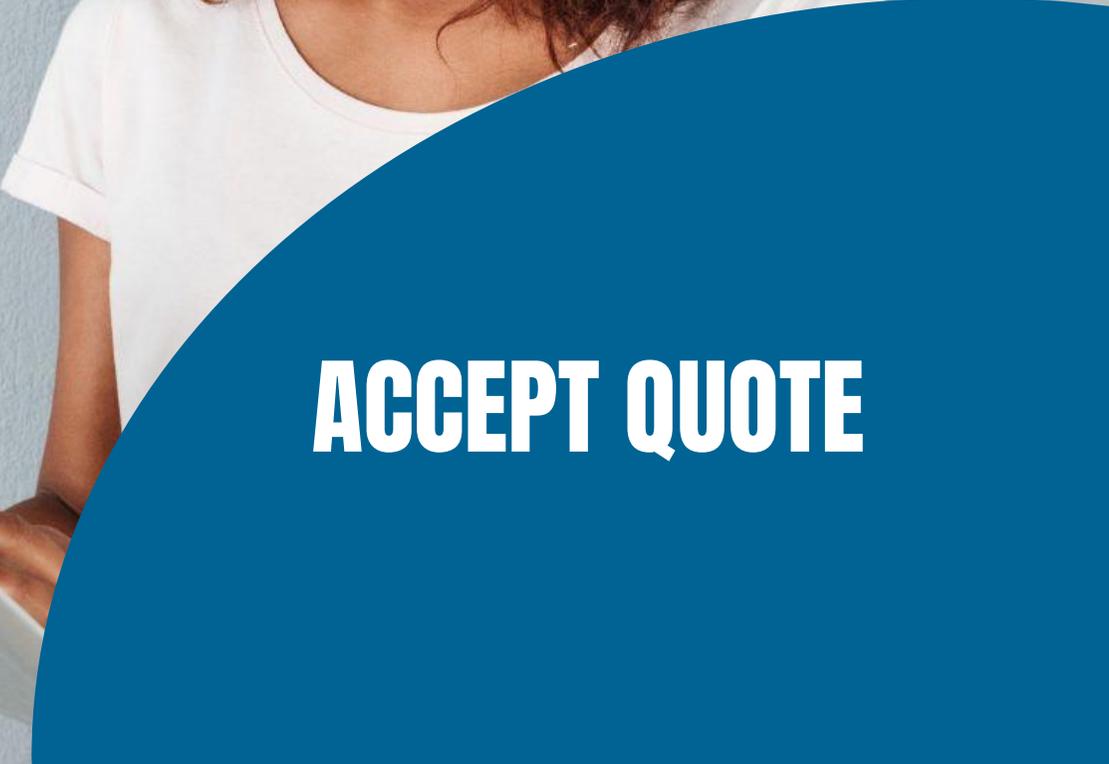
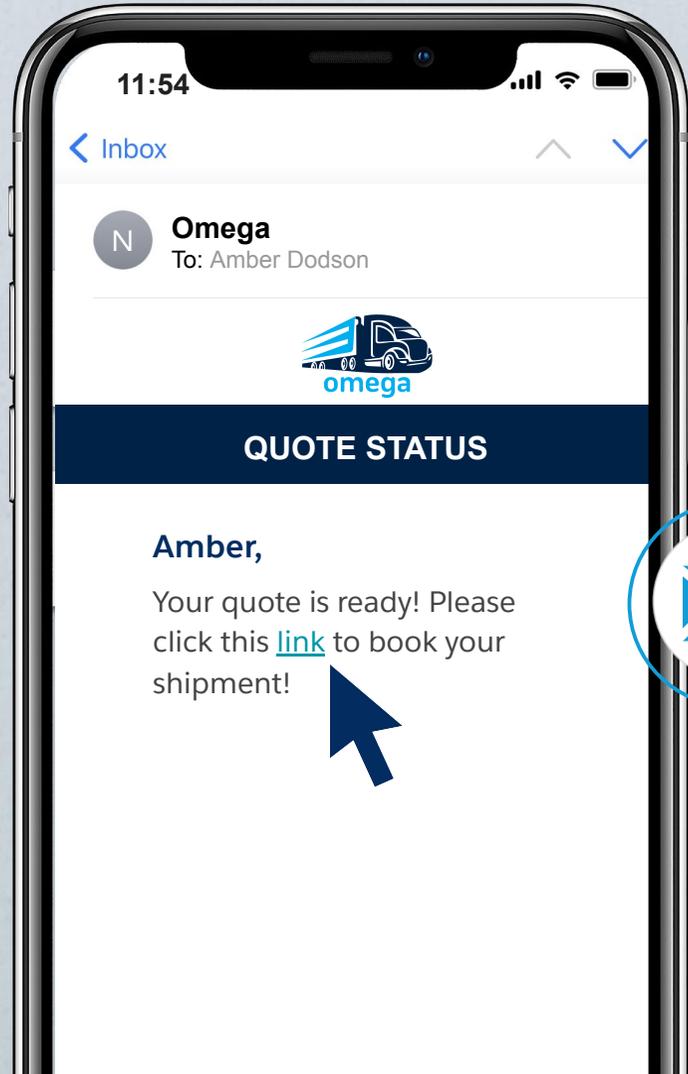
Rate Information

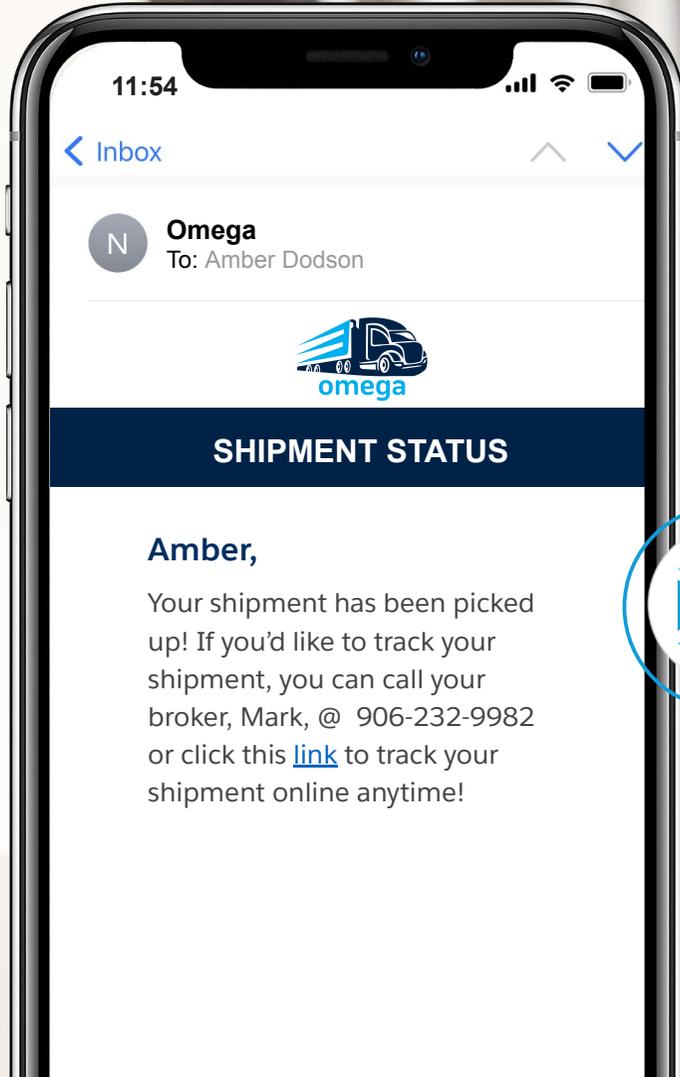
S.No.	Quantity	Description	Unit Price	Line Total	Action
1	100t	clothing	\$2.20	\$2,200.00	+
2	1	fuel surcharge	\$220.00	\$220.00	x
Subtotal				\$2,420.00	

Finish

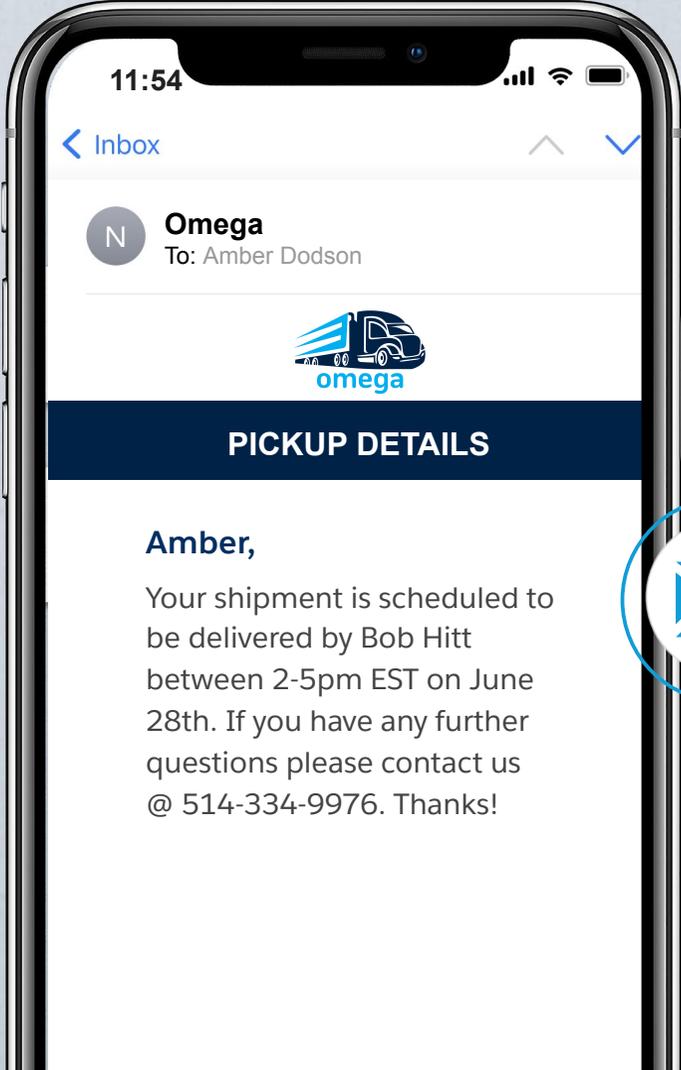


QUOTING

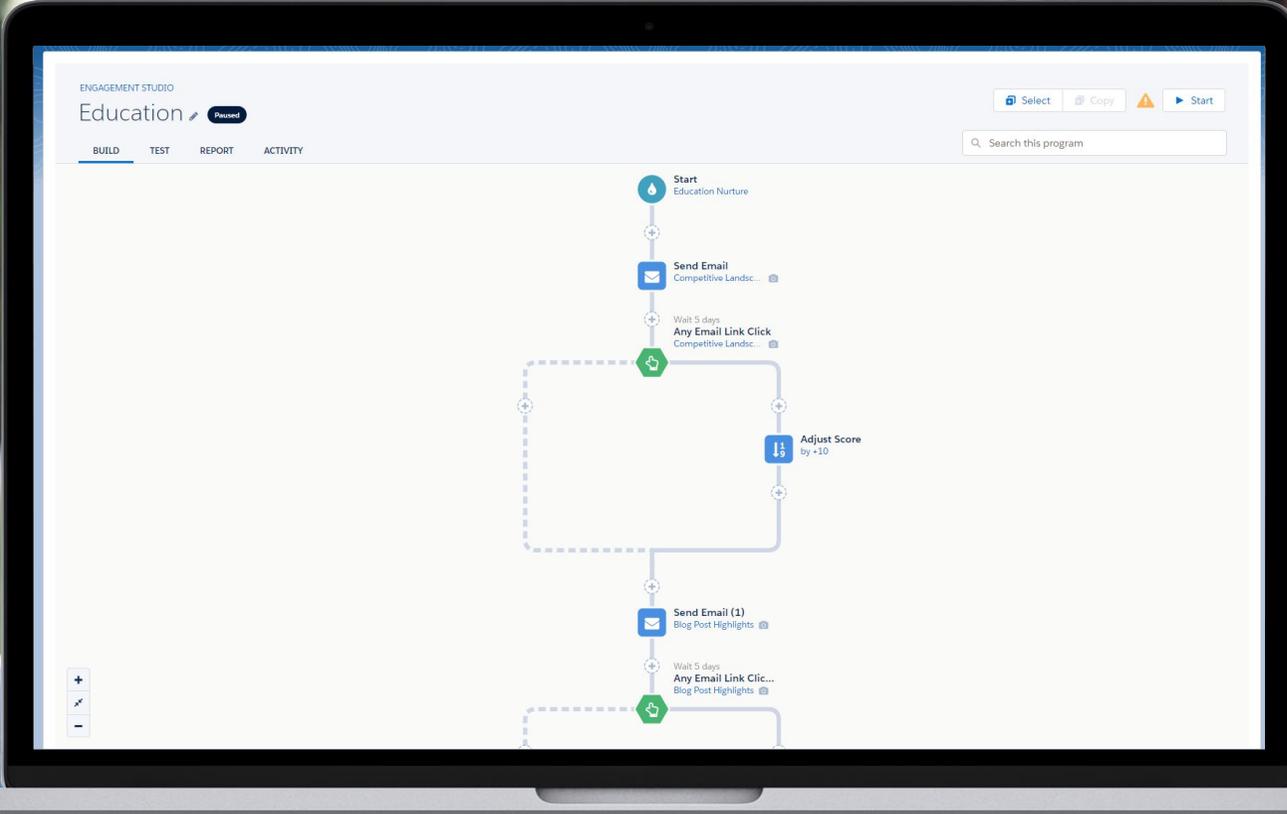




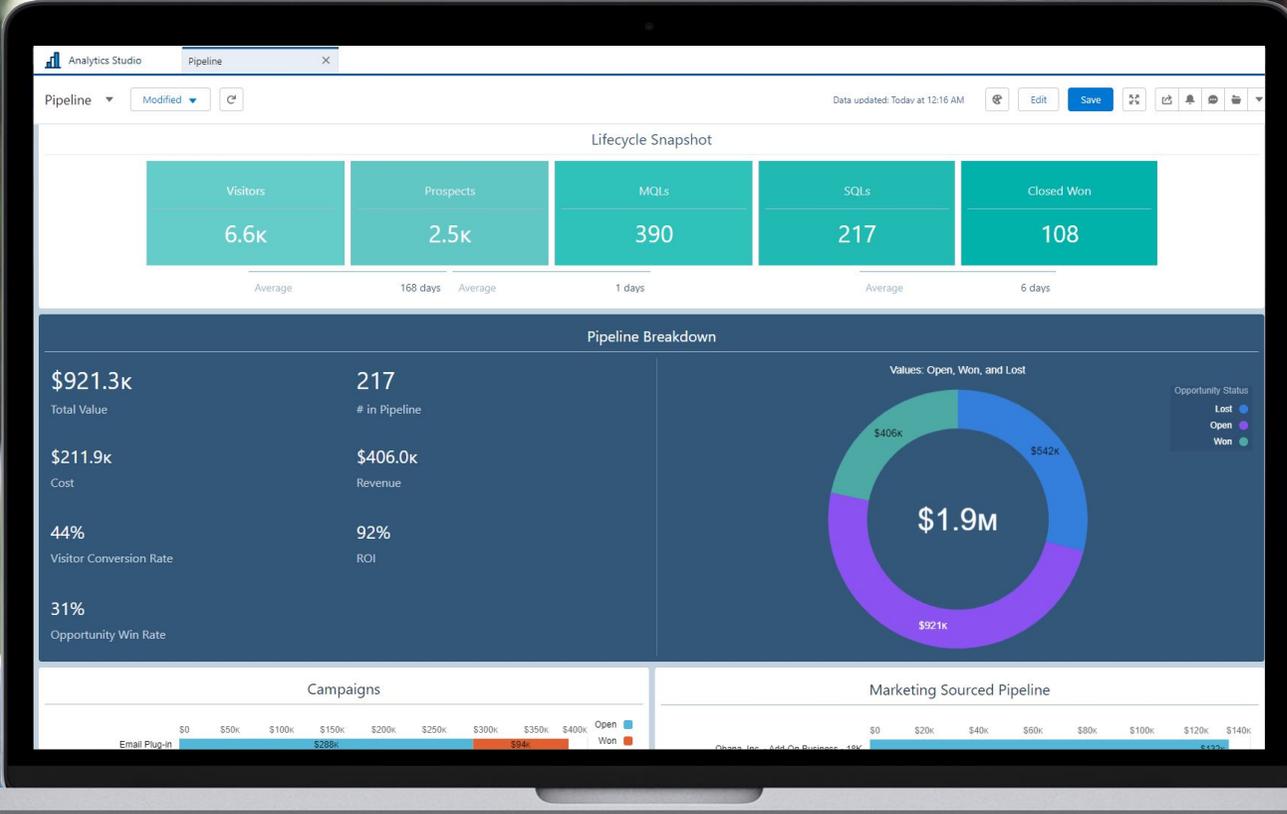
NOTIFICATIONS



NOTIFICATIONS



CAMPAIGN MANAGEMENT



Marketing & Pipeline Analytics

Find Out More



Bob Hitt

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bhitt@salesforce.com

913-594-2130



Kathryn Charleston

Solution Engineering Director
kcharleston@salesforce.com

312-805-3708



Thank you

