

ENHANCING EMPLOYEE ENGAGEMENT AND OPERATIONAL EFFICIENCY FOR TRANSPORT CO

Client: Major Transportation Co

Industry: Transportation



Challenge:

A major transportation company with 60,000 employees, faced significant challenges in efficiently connecting and communicating with both field and corporate teams. The existing systems were not integrated, resulting in fragmented communication, duplicate data, and inefficient processes. The company needed a comprehensive platform to streamline operations, improve employee engagement, and integrate various systems, including Workday and Salesforce.

Solution

Peterson Technology Partners (PTP) was engaged to define the strategy, evaluate market solutions, and develop data analytics to be displayed in a new portal. Our approach involved the following key steps:

1. Discovery and Planning:

- Conducted workshops to understand the existing system's complexities and pain points.
- Defined high-level business requirements and aligned stakeholders.
- Created a roadmap for the implementation of a mobile app and web solution.

2. System Redesign and Integration:

- Rebuilt the entire system within Salesforce to track end-to-end sales processes, starting from RFP to contract management and CLM (Contract Lifecycle Management).
- Integrated Salesforce with finance systems, eCommerce, ERP, and other external systems to eliminate data silos and improve data accuracy.

3. Development and Implementation:

- Developed a mobile app and web solution to facilitate seamless connectivity between the corporate team and field employees.
- Configured Salesforce to include essential functionalities and removed redundant fields, reducing the total number by 50%.
- Automated several processes to reduce execution time by 40%.

4. Training and Deployment:

- Provided extensive training to business users to ensure smooth adoption of the new system.
- Conducted sprint planning, execution, and retrospectives to continuously improve the solution.
- Deployed the system into production and transitioned it to the support team for ongoing maintenance.

Results:

1. Enhanced Employee Engagement

- Successfully connected 60,000 employees through a unified platform, improving communication and collaboration.
- Increased user efficiency by cleaning up the task assignment process and automating document management.

2. Operational Efficiency

- Achieved a 50% reduction in fields, streamlining business processes and reducing data duplication by 30%.
- Automated multiple processes, reducing execution time by 40% and increasing overall business efficiency by 30-40%.

3. Improved Data Accuracy and Reporting

- Enhanced the use of Salesforce's latest features and reporting capabilities, providing better insights for daily operations.
- Reduced manual steps in document management, ensuring accurate and timely information flow.

Conclusion:

The collaboration with PTP enabled client to modernize its communication and operational systems, leading to significant improvements in employee engagement and operational efficiency. By leveraging Salesforce and integrating with existing systems, client was able to streamline processes, reduce costs, and enhance overall business performance.