

# 5 STEPS TO SUCCESS

## 1. IDENTIFY TARGET ACCOUNTS

- Existing Accounts with little to no activity
- Accounts you invited but never adopted
- Anyone who is using multiple carrier websites to quote or dispatch
- Customers currently using a TMS (Kuebix, FreightView, LTL Select)

## 2. FIND CUSTOMERS PAIN POINTS

- How do they get rates?
- How do they dispatch?
- How do they track and trace or do they even bother tracking?
- Do they send out tracking notifications?
- Do other personnel need visibility?  
Ex: Accounting team?
- How do they create their BOL and labels?
- How do you manage your product list?
- WHAT DO THEY HATE THE MOST ABOUT THE LTL PROCESS? \*

## 3. EXPLAIN LINKEXTMS

- No more jumping to all your different carriers website for rates, tracking and dispatch
- Compare all carriers on one page to view transit time and cost
- All historical shipment history under one platform
- Saia wants a chance on all of your freight - we might surprise you (users internal routing guide)
- Broker technology at no cost
- Over 100 LTL carriers can be set up within minutes
- Chat with a platform expert online (response time is within minutes)

## 4. INVITING CUSTOMERS TO LINKEXTMS

- Get your customer on the phone or be in person
- Sent the invite while you are talking to your customer  
Invite email comes from support@mycarriertms.com
- Have your customer create a login and password
- Have your customer set up there other carriers
- "Click" on the Chat icon to chat with a Customer Support (CS) agent to help with
- Adding carriers (customers set up their core carriers)
- Set up other users to access the platform
- Upload your customers address book
- Create a product list
- Upload a product list
- Set up & enable customer tracking notifications



## 5. CUSTOMER FOLLOW UP

- Login to your LinkExTMS LTL Rep portal
- Check customer activity on your dashboard
- "Click" the chat icon to talk to your Customer Success Advisor (CSA) about:
  - Questions about the platform
  - Finding customers pain point
  - Game plan closing your accounts
  - Access to coaching resources (videos and documents)



\*Pain point per role document:

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