WINMORE PROCESS AUTOMATION
ACCELERATING INNOVATION

Case Study in Workflow Management

Featuring

C.H. ROBINSON

Andy Clarke,
Chief Financial Officer
(former)

- Oversaw finances at C.H. Robinson, the largest freight broker in the U.S. during a period of rapid growth, returning nearly $2B in capital over the last four years
- Transformational leader who worked closely with commercial leaders to digitize processes and improve efficiency
- Previous leadership and board experience include Forward Air, Panther Expedite, ArcBest and others

Why Digitize Now?
- Commercial processes must be digitized as shippers demand faster deliveries and accurate, real-time visibility.
- If leaders don't move quickly, they're likely to be left behind.
- The key to survival is extracting better data and using it to make smarter decisions.

Why Prioritize Contracted Revenue and the RFP Process?
- Shippers are looking for stability in their budgets and consistency in their execution.
- As a result, many are shortening the duration of their contracts.
- The RFP process is an ideal workflow to standardize, to get everyone speaking the same language with the same data set and the same tasks.

Winmore
Customer Success Platform for Logistics

How should leaders think about digitizing their commercial processes?

Human interaction will always be a critical part of the supply chain, yet it is accelerated by the quality of technology. The challenge is to integrate humans and technology, recognizing that there will be an inevitable disruption. Without question, you need to have people who know to cleanse and monitor your data. Because if you take corrupt, incorrect or incomplete data and you don't have a good process, I guarantee you're going to have the wrong outcome. That said, if you are serious about digitization and integrating humans and technology, start with a process that is likely to be successful.

As to which processes to prioritize, I encourage commercial leaders to ask, "Is the commercial process proprietary to what we do?" If it is, then build it. If it's not a proprietary process but it's a repeatable process, like a sales pipeline or preparing responses to RFPs, there are well established sales methodologies and RFP processes with well-established CRM and RFP/bid software providers that you can use.
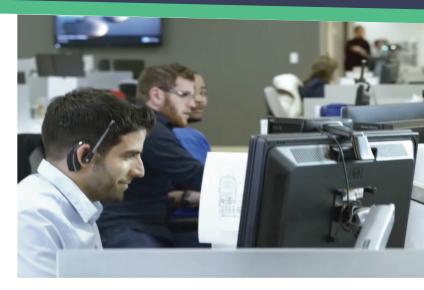
After you've decided to digitize a commercial process, is there a framework you've used to reduce risk in the implementation?

Yes, I received advice early in my career on how to think about process improvement: simplify, standardize, and automate.

First, simplify by focusing on the activity that's most important, how you determine success with metrics that are measurable, like operating margin or your RFP win rate. Then, standardize it across

> *"Simplify, Standardize, and then Automate — that's a proven framework for digitizing commercial processes."*
>
> **– Andy Clarke,**
> *former CFO, CH Robinson*

your organization – often with the help of technology that supports your process. Finally, when you know the outcomes that you're looking to achieve, you automate the process by balancing human and technology to drive the optimal result.

I think people's natural instinct is, "Well, let me just automate this process…just give me automation." But if the process hasn't gone through those first two assessments — simplification and standardization — and it hasn't gone through the rigor of asking some tough questions, you're automating something that probably actually shouldn't be automated.

You've evaluated a lot of software over your career. Is there one question you ask to assess the business value of an innovation?

I go back to the lens of "Does it make people's lives easier, specifically your employees or your carrier?" Innovation to simply say you're "innovating" is just not good enough. It must go through the gauntlet of, "How does this make our customers' lives easier? How does this make our carriers' lives easier? How does it make our own people's lives easier?"

We've talked about the market swings between contracts and spot, yet the logistics industry is also experiencing a very tight labor market, which can present its own set of challenges in digitizing commercial processes. How
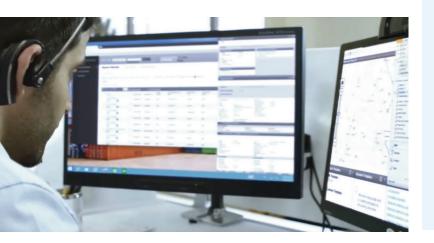
have you seen the labor dynamic impact the success of digitization projects?

Say, for example, I'm the broker and you're the shipper. What happens if you take another job? What happens if I take another job? That relationship, along with the institutional relationships that we've developed then changes overnight. Or worse, all of our respective bosses have changed. There are many constraints that go into the equation, beyond the sharing of data between the broker and shipper.

If you've simplified, standardized and automated the process, you have a digital history of the relationship, from the first RFP and the first bid response. That's a safeguard against the change of people on both sides of the equation.

With this digital history, you can bring your teams together in a way that creates value and makes people's lives easier. Getting people to collaborate internally inside their own organization has always been a challenge. Again, it's not because people don't want to, it's just that they get pulled in different directions. If those directions and priorities map to a simplified, standardized and automated process that creates real value, then you can bring people together, call it collaboration or just "getting the job done".

Now, let's dig into the RFP and tender process. How should commercial leaders think about digitizing this workflow?

"Brokers and carriers have to collaborate around standardized processes, sharpen their ability to extract better data, and use that to make smarter decisions, knowing how quickly the market changes."

– Andy Clarke,
former CFO, CH Robinson

If you think about how customers go to bid, how shippers are bidding and how carriers or brokers are responding to those bids today, you'll see multiple rounds of information shared back and forth between them, with greater emphasis from both sides on analytics and data. Everybody wants to get to better price discovery and everybody wants to get to better procurement of services in a more efficient way, so brokers themselves and service providers are under the same pressure to improve the efficiency of their processes.

The market has changed radically and dramatically over the last three or four quarters. Shippers are shortening the duration of their contracts. Brokers and carriers have to sharpen their ability to extract better pricing data and use that to make smarter decisions.

ABOUT CH ROBINSON

Named after its founder, Charles Henry Robinson, C.H. Robinson has evolved from a wholesale produce brokerage house into one of the largest third-party logistics (3PL) companies in the world. Today, the Fortune 500 corporation is headquartered in Eden Prairie, Minnesota with more than 300 offices and over 15,000 employees in North America, Europe, Asia, and South America. It has contractual relationships with over 66,000 transportation companies, including motor carriers, railroads, air freight, and ocean carriers.

ABOUT WINMORE

Customer Success Platform for Logistics Companies

Winmore's Customer Success Platform helps commercial teams win more RFPs, accelerate time-to-value and build customer relationships at scale.

- **Bid and Tender Collaboration** for commercial, pricing, contracts and product teams to qualify and respond to RFPs and tenders, boosting win rates.

- **Customer Solution On-Boarding** for managing complex on-boarding customer implementations, accelerating time-to-value, reducing the risk of scope creep and improving operating margin.

- **Business Process Design Studio,** a drag-and-drop business process modeling tool for developing multi-stage, collaborative workflows to bring your custom processes to life.

Winmore powers the customer success initiatives at some of the world's most respected logistics service providers, including carriers such as Averitt Express, brokers like CH Robinson, forwarders including Kuehne + Nagel and contract logistics providers such as LF Logistics.

Winmore was recently recognized by FreightWaves as a *FreightTech 100*, an award reserved for the most innovative software companies in the world.

Learn more at winmore.app

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