FREIGHT BROKERAGE · ACCOUNT MANAGEMENT OPERATIONS

Customer relationship management

This workflow automates customer relationship management for freight brokers by tracking shipment milestones, analyzing customer satisfaction, and triggering personalized follow-up communications to enhance retention and identify growth opportunities.

01 WORKFLOW TRIGGER

Shipment delivery confirmation received from carrier or tracking system

BLUEPRINT OVERVIEW

What this workflow accomplishes

This workflow connects delivery confirmations from Axon TMS and Sylectus to the customer record in McLeod LoadMaster, then scores relationship health and drafts the follow-up plan. Automation handles the data posting, pattern analysis, churn scoring, and calendar scheduling. Account managers and the sales manager keep authority over what gets said to the shipper, what pricing or service concessions are offered, and which accounts get escalated.

01

OUTPUTS

Updated shipper profile and metrics, Prioritized account manager task list, Relationship health and churn score, Outreach plan per account

02

SUCCESS MEASURES

Customer retention rate, Revenue per customer, Customer satisfaction score, On-time delivery percentage

03

CORE SYSTEMS

Axon TMS, Sylectus, McLeod LoadMaster

HOW TO USE THIS BLUEPRINT

Brokerage owners: set the churn risk thresholds and decide which accounts require your signature before a retention offer goes out.

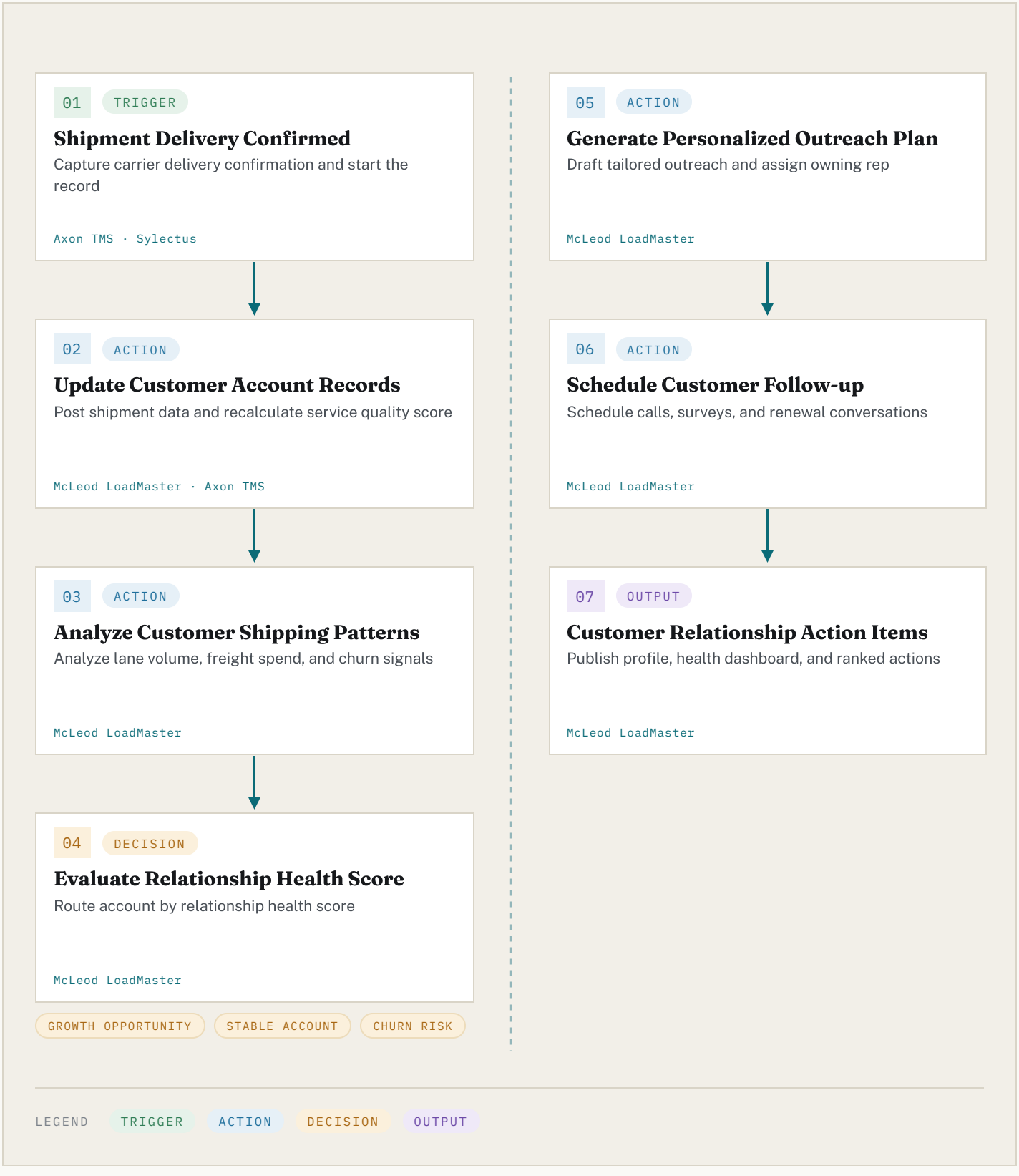
Account managers: review the daily task list, confirm the outreach draft matches what you know about the shipper, and log the call outcome back to the customer record.

Implementation teams: map Axon and Sylectus delivery events to McLeod customer IDs and verify service quality scoring picks up OS&D and detention claims.

THE WORKFLOW

End-to-end stage map

Seven stages run from the carrier's delivery confirmation to a prioritized account manager task list. The decision point at stage 4 governs whether an account is treated as growing, stable, or at risk of churn, and that routing determines the outreach that follows.



IMPLEMENTATION DETAIL

Stage-by-stage breakdown

Each stage states the operational intent, the human control point, and the systems likely to take part. System names are examples, not a required architecture.

01 TRIGGER

Shipment Delivery Confirmed

Automated notification received when carrier confirms delivery completion or GPS tracking shows arrival at destination. This triggers the customer relationship management workflow.

CONTROL POINT

Dispatch verifies the POD is attached and the delivery timestamp is accurate before the event is allowed to post.

SYSTEMS Axon TMS Sylectus

02 ACTION

Update Customer Account Records

Customer shipping history, delivery performance metrics, and account status are automatically updated with the completed shipment data. Service quality scores are calculated based on on-time delivery and damage reports.

CONTROL POINT

The claims coordinator confirms any OS&D or damage report is attached before the on-time and service scores are finalized.

SYSTEMS McLeod LoadMaster Axon TMS

03 ACTION

Analyze Customer Shipping Patterns

AI analyzes customer's historical shipping volumes, preferred routes, seasonal trends, and freight spend to identify relationship health and expansion opportunities. Predictive models assess churn risk based on shipping frequency changes.

CONTROL POINT

The account manager can flag known seasonal lulls or project freight so the model does not read them as churn.

SYSTEMS McLeod LoadMaster

04 DECISION

Evaluate Relationship Health Score

System evaluates if customer shows signs of increased activity, stable relationship, or potential churn risk based on shipping patterns and service quality metrics.

CONTROL POINT

The sales manager reviews every account routed to churn risk and can override the score before outreach is built.

SYSTEMS McLeod LoadMaster

COMPLETION AND MEASUREMENT

Closing stages and results

The closing stages preserve the outreach record on the customer profile and measure whether follow-up actually held the account and grew the lane volume.

05 ACTION

Generate Personalized Outreach Plan

Automated system creates tailored communication strategy - thank you message for stable customers, retention offer for at-risk accounts, or expansion proposal for growing customers. Assigns appropriate sales rep and sets follow-up timeline.

CONTROL POINT

No retention pricing or service concession leaves the system without written approval from the sales manager.

SYSTEMS McLeod LoadMaster

06 ACTION

Schedule Customer Follow-up

System automatically schedules appropriate follow-up actions including delivery confirmation calls, service feedback surveys, contract renewal discussions, or new service presentations based on customer segment and relationship health.

CONTROL POINT

The assigned rep confirms or reschedules each task and can suppress a survey on an account with an open claim.

SYSTEMS McLeod LoadMaster

07 OUTPUT

Customer Relationship Action Items

Final workflow output includes updated customer profile, relationship health dashboard, and prioritized action items for account managers with recommended next steps and timeline.

CONTROL POINT

The account manager closes each task with a call outcome note, and the brokerage owner reviews the health dashboard weekly.

SYSTEMS McLeod LoadMaster

DELIVERABLES

- Updated shipper profile and metrics
- Prioritized account manager task list
- Relationship health and churn score
- Outreach plan per account

KEY METRICS

- Customer retention rate
- Revenue per customer
- Customer satisfaction score
- On-time delivery percentage

IMPLEMENTATION CHECKS

- Match TMS customer IDs to McLeod
- Restrict rate concession approval rights
- Log all outreach to account record
- Suppress duplicate follow-ups per shipment
- Set claim data retention window

NEXT STEP

Turn this blueprint into an implementation plan.

Map each stage to your own systems, permissions, and approval routing before selecting tools or building automation.

packfoundry.app/assessment

FREIGHT BROKERAGE WORKFLOW PACKS AND A FREE ASSESSMENT