



THE EUROPEAN
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Customer Relationship Management

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THE EUROPEAN FREIGHT AND LOGISTICS LEADERS FORUM

Customer Relationship Management

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INTRODUCTION

A survey of 100 European companies revealed that corporate planners rank managing relations with customers as the most important source of competitive advantage over the next years.

The ability to know more about their customers, to have high quality information about the behaviour and their decision making processes, have been always the main priority of market oriented companies.

CRM stands for Customer Relationship Management. It is a basic piece of any corporate business model to ensure, intelligent and effective control and management of the customer base of the company.

Good customer relationships are at the heart of business success. There are many technological components to CRM, but thinking about CRM primarily in technological terms is a mistake.

The more useful way to think about CRM is as a process that will help bring together lots of pieces of information to get a comprehensive view of the customers.

The information can come from different systems:

- Sales registration systems
- Warehouse management systems
- Transport management systems
- Financial Systems
- Complaint registration systems

Therefore CRM is a fairly broad term including a number of discrete applications, all concentrated around a company's ties to the customer: customer service, including contact centres and e-mail management, field service and web self-service; e-commerce including product configuration, sell-side content and personalization, marketing automation and trade promotion, management; partner relationship management (PKM); sales force automation; and customer analytics.



In the last decade the increasing IT resources available for companies have brought a renaissance of the so called "Enterprise Solutions". (ERP).

The combination of Warehouse Management Systems (WMS), Transportation Management Systems (TMS), and Order Management Systems (OMS) - from ERP - has given rise to a new IT product category - CRM.

Corporate organizations interested in pursuing this new technology will face the daunting task of evaluating the pros and cons of a CRM system.

Although the field of Customer Relationship Management provides a wealth of opportunities to create value for a company, one of the more difficult aspects is recognizing which initiatives can deliver the most value for a particular industry and a specific company.

Depending on their unique requirements, different industries will use various aspects of CRM.

Consumer-goods makers were among the first to adopt CRM, but were followed soon after by the Insurance and Financial Services Sectors.

Transportation has emerged as a potential customer within the last three years, both on the freight and passenger side. Carriers haven't sought the kind of customer intelligence that's better suited to businesses such as consumer goods, where so many purchases are "spur of the moment" and market trends are very unpredictable.

In transportation and warehousing, the most favoured applications are, in descending order,

- sell-side e-commerce,
- customer service;
- contact centres
- and sales force automation.

Transportation Service is closely related to Order Management and it could be a prime candidate for some form of CRM.



That's followed immediately by transportation optimization, where the service company determines the best way to move the order to the customer.

Most transportation providers have focused on minimizing price and what customer-facing technology they use have been in the area of **logistics execution**, such as shipment booking, tracking and tracing.

Shipment tracking and tracing, for example, is crucial to every major carrier's basic offering. Yet it's very much part of the whole customer-relationship piece.

Most carrier call centres are home-grown, not built from off-the-shelf software.

In addition few carriers have adopted sales-force automation (SFA).

Many shipments are handled today via the internet or portals, where customers can quickly learn the status of their shipments or the availability of equipment to move them.

As basic transportation services become more of a commodity, providers search for ways to break out of this situation. One solution is better knowledge about customers -what they want from logistics partners, what they'll buy in future and how profitable they are to their providers

Carriers are expressing a clear desire to be more efficient about the way they deal with shippers. The goal is, to reinforce customer loyalty while making the best use of limited assets.

That might help to explain why, in a recent survey, transportation companies were committing 21% of their applications budgets to CRM in 2004.

Another spending report found that 86% of transportation companies planned to invest in marketing automation systems and customer data analysis in the coming year.

71% cited SFA and partner and channel management as additional spending priorities.



The third-party logistics providers (3PL) are different from carriers. As they may be non asset based organizations they have may have simple business model and be in a better position to focus on their customers.

Usually 3PL`s are network based as well and have also more developed IT background.

The 3PL`s are more and more sensitive to changes which could occur in their customer base. For the vast majority of companies, retaining customers is less expensive than winning new ones. Logistic service providers need to have large and varied customer base that justifies the sophistication of a full-blown CRM suite.



THE F&L AND CRM

The F&L Forum is a unique meeting point of Europe's largest companies

Participating members are some of Europe's biggest shippers and logistic service providers.

Member companies are usually connected in a daily business relationship by buying or selling services to and from each other.

Their business relationships are often B2B.

This relationship is rather special one and have several limitations in the term of the very broad CRM terminology.

- F&L members are large companies acting in large markets
- The related product is complex; it is a service and not a product
- A portfolio of service are required with Multi-site operation
- The number of customers (suppliers) is low
- Customer/supplier Life-Cycle is usually long term
- Fulfilment of the contracts means large number of transactions within the framework of a long term contract

F&L members are typically large organizations, which means that the service being purchased has large volume consisting of tens of thousand of loads or shipments.

The logistic services needed could be a portfolio of different service modes or a bunch of services covering a specific geographical area.

This scale of operation is usually purchased through a tendering process on an annual basis.

As Members may be both shippers and service providers, and are both buying and selling services they may be involved in both Customer and Supplier Relation Management activities.

Large organisations enjoy significant purchasing power and tend to use it to streamline their supplier base. Service



providers try to meet this changing purchasing profile by offering more and more complex and larger services.

We assume that members of the F&L have the necessary corporate culture to enable them to continuously adopt new technologies.

In the case of the transportation industry, only the largest providers are most likely to acquire a CRM package; smaller, more regionally based companies, may not be able to justify the cost and effort.

- MANAGING RELATIONSHIPS the managed-service provider (MSP)
- MANAGING SUPPLIER RELATIONSHIPS, PARTNER RELATIONSHIP MANAGEMENT (PKM);



MANAGING RELATIONSHIPS : the Managed Service Provider (MSP)

The increasing complexity of logistics management coupled with the explosion of information technology has created fertile ground for Managed Service Providers (MSP).

This is a high end service and a most sensitive form of the outsourced business activities.

Not only has it enabled 3PL's to offer better services but it has also facilitated the growth of 4PL's.

Logistics outsourcing is becoming analogous to the information technology sector of the economy.

Alliances and joint ventures are more prevalent in the IT sector, but as the supply-chain sector becomes more information-rich and thus more akin to the IT world, it's natural to expect a growth of alliances and joint ventures in the logistics sector.

Whilst alliances maybe difficult to work with (and ownership of client relationships remains an issue), they are a necessary evil, a faster way to get capability on board an enterprise.

Some leading-edge shippers have been demonstrating that you can use the resources of a strategic partner without giving up control entirely.

The big players in the service industry may be big, but they still need to be able to visit the customer for those fixes that just cannot be accomplished with remote management tools.

Global 3PL's are working with literally hundreds of smaller MSPs around the globe to provide specialized services as well as local support.

These large companies cannot survive as sole service provider entities. If you take a closer look at their business models, it is clear they are growing through partnerships.



The MSP market is not dead, nor is it dying. The MSP model is changing. The MSP business model is a strong, viable model. For the small and mid-sized MSPs to grow strong they will need to partner.

There are significant customer relationships that can be developed by the smaller local service providers that the big players cannot begin to emulate.

Large Pan-European contracts assume that service provider has

- 100% availability in terms of capacity
- cover large geographical service area
- skills to deliver agreed service levels

More and more transactions occur under contractual or long-term relationships.

Shippers are more and more demanding and require a "stand by" support in the contractual period which consists of a combination of IT tools and human capacity.

And carriers have discovered that knowing more about customers can improve their ability to negotiate prices, and maximise contract profitability whilst providing better solutions to meet their customers demands.

It's crucial for the MSPs to know which accounts are the most profitable, and deserving of extra attention from Sales and Customer Service teams.

Companies looking to widen their margins would do well to know which customers are behind on their bills, haven't paid, have previously received huge discounts, or aren't otherwise remunerative to the provider. (Improperly rated bills are still costing the industry "tons of money," and threatening carriers and logistic service providers)

Key Account Management is an ongoing and repeated process consisting of responding to request for quotations, participation on different tenders, contract negotiations.



Parallel to this Business Development should continue to seek more, large customers and businesses, to match the existing service portfolio or available capacities.

In the phase of fulfilment service providers should be in the position to deliver this support giving increasing volume and complexity of information to shippers about the freight and parallel to this they should be in the position to optimise their processes to be able to meet the complex profit versus price requirements.

Large Pan - European contracts assume the ability to deliver a suitable regional service integrated with quality local service as well.

Because the supply chain planning is still a weak point of shippers a Service Provider should be able to work out and operate effective constraint management capabilities.



MANAGING SUPPLIER RELATIONSHIPS

Supplier Relationship Management (SRM) is an emerging market that enables a company to analyze, control, and optimize information about suppliers.

Companies are seeking best-in-class tools to improve efficiencies in this area. In the next couple of years these systems are going to be integrated into a comprehensive SRM system that shares, controls, and exploits the knowledge gained by its components.

For shippers SRM can be exploited by managing a portfolio of three sub applications:

- Sourcing Management (tendering, pre-procurement processes),
- Order Management (execution and tracking),
- Supplier Management (analysis, KPI performance and compliance management).

All of these systems help shippers to lower costs, reduce risks, and increase profitability by improving their ability to improve the management and control their service provider base and expanding the reach and capabilities of their supply management organization.

The term strategic sourcing denotes everything that precedes identifying potential suppliers, request for quotation (RFQ's), contract negotiation and tendering, signing of a contract and also including spend analysis as well.

Several things that come later includes the monitoring and improving of existing service providers and also the analysis of the effectiveness of a supplier versus other suppliers based on defined criteria and weights, established metrics, and an overall score.

We could realize several problems around the procurement of logistic service. Some shippers are still struggling to achieve a final internal consensus about corporate competences of the logistic purchasing. Supply Chain Management and Corporate Purchasing both are still candidates for the job.



Because of their size, in larger shippers, more transactions occur under a contractual or long-term relation.

The very nature of transportation and the way it's purchased is also an issue. Transportation activities do not occur in a vacuum.

They impact and are affected by other business functions. Tens of thousands of forecasted loads covering nearly the whole of Europe are under one controlling instrument (Tracking and Tracing).

Yet it is not like purchasing a commodity

Today it goes far beyond the ordering of large numbers of movements and includes complete logistic services.

Carrier bid optimization (the common term for transportation procurement) has very specific capabilities (e.g., transportation lane definitions, types of equipment, special services, driver restrictions, route and continuous move definitions) designed for transportation procurement. Companies considering transportation sourcing should focus only on vendors with experience in carrier bid optimization

We are beginning to see, at shippers, more supply-side practitioners gaining recognition for their ability to contribute to the long-term strategic success of the enterprise - and those individuals clamouring to participate in this success.

CRM/SRM relationship in B2B business environment

After the consolidation of the late 90`s a recession period has affected the main European industries and therefore it seems that cost saving has become one of the crucial element of success.

Logistic costs which tend to be about 10-15% of the total cost were seen to be important by top management.



Because SCM has a high priority amongst big European manufacturers the accuracy and complexity of their logistic services have also become very important.

Service levels and costs, are today, key factors for a successful operation in the first class European manufacturing.

Under growing pressure, the knowledge of the shippers about the service industry and the potential service providers have been improved in the last couple of years.

In their European HQ's they have developed teams of highly qualified logisticians often with practical logistic experience.

Market competition forced them to use more sophisticated selection the introduction of benchmarking and the usage of different KPI`s. Parallel to that shippers started to roll out their pan European logistic system.

The main pillars of an integrated logistic solution are

- Balanced geographical coverage of the service
- Mixed usage of global and local partners
- Centralized purchasing resulting in well selected reducing number of service providers
- Introduction of standard processes and systems in the service (KPI, IT tools and safety processes)

Global 3PL of the world are working with literally hundreds of smaller MSPs around the globe to provide specialized services as well as local support.

- These large companies cannot survive as sole service provider entities. If you take a closer look at their business models, it is clear they are growing through partnerships.
- Fixed and declared mode of communication with the service partners (tendering and execution) building of knowledge of the service providers



Functions and Definitions of the CRM/SRM applicable for F&L members

Taking into consideration the nature of the logistics and needs of the F&L members the wide range of CRM functions or modules available, should be reduced to a well defined package of functions which cover the customer/supplier interactions practiced in the F&L Forum.

The main areas covered should include:

- Sourcing and Tendering
- Fulfilment and Execution
- Measuring and evaluation



TENDERING

In the 90`s the RFQ`s become the most frequently used method to source logistic services.

In transport/ logistic services, tenders are often issued on an annual (yearly) basis.

Warehousing, TM services are often purchased for longer periods. (often between 3 & 5 years)

Because of the physical infrastructure related nature of the service tenders are also separated by geographical areas. Pan - European or regional tenders are the most common structure.

With the enlargement and further integration of the European logistic market we will see growing number of national tenders related to the accession countries as well.

During the B2B "gold rush", reverse auctions through trade exchanges started to take place. It soon became painfully obvious that logistic as production-related service could not be purchased solely on the basis of price.

We should mention here that tenders are the first and important channel between shippers and service providers.

This is the start to build their also long term relationship as well.

Shippers

In the last century we saw a centralisation process rolling out in the Logistic Planning and Pan- European Supply Chain Management Divisions of the global manufacturers.

As a consequence strategic sourcing started to be used to in the fields of logistic and transportation services.

Strategic sourcing gives the ability to manage the supplier base which could deliver the required service quality at the lowest possible cost.



One of the crucial elements of the strategic sourcing is the consequent usage of tendering in the purchasing of logistic services.

Tendering is used by the shippers

- To check the market and look for favourable rates
- To invite new players as potential future service partners
- To build its European service network and create core/strategic partnerships

Service providers

Large Pan- European contracts assume that the service provider is able to deliver

- 100% availability in terms of capacity
- coverage of larger geographical service area
- service levels to the agreed standards
- the necessary IT enabling tools

Service providers with a large Key Account base have been able to build the internal skills necessary to participate in tenders.

Business development and successful tender participation are moving together in companies that are growing.

The main goals of service providers are;

- to maximize the number of RFQ to which they are invited.
- to issue competitive tender response documents
- to increase the number of key customers representing an appropriate mix of sectors and products
- to adjust the customer base to their core services and corporate strategies

Key Account Management –as one of the basic of the CRM - is an ongoing and repeated process consisting of responding to request for quotations, participation in tenders and finally in contract negotiations.

Parallel to this Business Development should deliver further sizeable customers which have to match the existing service portfolio or available capacities.



SERVICE FULFILMENT

The relationship in this phase between shippers and service providers is more complex and really interactive.

In this phase, service providers must be able to deliver their service with increasing volumes of quality operational information to shippers.

Carriers must execute planning and scheduling based on available orders, maximising their use of assets while meeting customer requirements.

Ideally, all information about loading, pickup and arrival times will be available to sales representatives in the event a shipper inquires about the status of its freight.

Parallel to this they should be in the position to optimise their processes to be able to meet the complex profit versus price requirements.

Although this relationship should be governed by the contract the practice on the market is often different. Shippers are sometimes not careful enough in specifying their requirements

In practice all of the performance criteria need to be detailed in such a way that both parties can have a single understanding of it.

The fulfilment of a logistic contract can be divided into standard phases. These could be

- Booking
- Communication during Execution
- Constrain Management

A large selection of IT tools can support each of the three phases.

Typical contents of communication in transportation contacts include;



BEFORE TRANSACTION

- Call-offs
- Acceptances
- Changes (if any) / Negotiations
- Confirmation
- Cancellations

DURING

- Did the driver pick up the goods?
- What goods are loaded on the truck?
- Are the goods delivered on time?

Large Pan- European contracts assume the ability to deliver integrated regional and local services.

Because supply chain planning is still a weak point of shippers a service provider should be able to work out and operate effective constraint management capabilities.

In large operations, consisting of thousands of shipments, failures can happen.

Agreed KPI's in the SLA's help, but proactive warning procedures and agreed troubleshooting actions are gaining importance in shippers view.

All of these functions are collected in the Exception/Constraint Management piece of the CRM.



MEASURING AND EVALUATION METHODS

Analytical systems are generally *subject-oriented*, organized around business areas that the organization needs information about.

Analytical systems are generally concerned with *historical data*.

On the one hand this should provide useful benchmarking of the different contracts and shippers on the other hand it is necessary to control the margin or revenue situation of a contract.

Data analysis should be brought together in a functional reporting system which provides regular internal analysis for service provider management and the shipper.

As stated previously, data analysis allows the operational CRM investment to be maximized. As user spending slowly moves away from a near total focus on cost control and back toward revenue generation, data analysis becomes a very attractive investment with a fast payback time.

Typically, a manufacturer would pre-establish the metrics it wants to measure, periodically review performance with its service provider, and make adjustments as they go along.

Logistic service providers must know exactly where they have failed to live up to customer expectations. The reports will be sent via e-mail and tied into a quarterly scorecard

The universally accepted Supply Chain Operations Reference (SCOR) model is an ideal tool for guidance with key performance indicators (KPIs), and it can be a useful framework for logistics management, but it doesn't end there.

There isn't "a standard set" of logistics metrics because a great deal depends on a company's profile, supply chain position, and vertical integration.



To have a complete analysis of the flow of the service provided has also become an important part of the work of the service providers.

Logistic Managers at shippers and Key Account Managers at the service providers should both know how well service has been performing.

The same information is used both at the execution level and later for long-term service and asset planning.

Another part of the challenge with logistics metrics is the number of disparate systems KPI data is pulled from, including warehouse management and transportation management systems (WMS/TMS).

Some material handling systems also may house throughput information, which should be factored into metrics, and logistics providers have a wealth of information regarding shipments.

A WMS may send a message saying a shipment was made today, but service providers or carriers also must acknowledge that they received it on-time.

Analytical CRM can be of great value to transportation companies.

- It can aid in demand forecasting and identify changes in Customer needs
- Service providers can proactively approach Customers with service enhancements

All proposals should aim to improve the quality of the service and forecast better financial results for both the shipper and the service provider.

Lacking analytical capabilities on both shippers and service provider`s side is a serious mistake ...

If a service provider cannot provide his own suitable report system he should participate in the report system of the shipper.



The analytical applications can also help the provider to assign resources to new customers, as well as new projects for existing accounts. It manages the proposal, design and implementation stages.



CRM/SRM PROJECT MANAGEMENT

The introduction of a good CRM strategy should certainly be seamless to the customer and not temporarily lower the performance of the company in the fulfilment of the service.

Analysis shows that as many as 60% of CRM projects have little or no impact on the actual customer relationship.

Successful CRM/SRM projects are based on the following pillars

- Process description
- Objective setting
- Management support

But there are some other important practical criteria's as well, like

CRM lacking customer focus

Service providers are to achieve a better focus on the customer, in order to cross sell, offer a more personalised service and support larger volumes of customers.

CRM systems must change from a simple front-office tool for sales people to become a pervasive force that creates a two-way relationship between the service provider and the customer.

Organizations must centre their CRM strategies on creating customer relationship differentiators.

Program management offices

Companies seeking a more comprehensive approach to CRM, rather than discrete implementations, should implement CRM Program Management Offices (PMOs).

The cultural and political challenges of creating an enterprise CRM strategy are just as significant as the technical issues, including information sharing between lines



of business (LOBs), channel synchronization, and point-of-interaction integration.

Without a CRM PMO, major CRM initiatives will not be designed around the customer, but will tend to be designed only around the LOB in which the CRM projects reside.

Change management is crucial to CRM success

The introduction of Customer Relationship Management systems often disappoints their users because companies forget to address change management issues, especially in key areas such as Sales Management.

Companies should allocate at least half of their CRM budgets to change management issues, such as training, in order to get the best value from their implementations.

Data availability

The core of any CRM/SRM is to collect information about customers or suppliers.

While a conventional CRM implementation typically provides data for the sales force of the company, it is rare to see a system that also offers the customer any meaningful, actionable information.

In transportation for example, shippers should have all information about loading, pickup and arrival times of all the loads.

Additionally the data should be traceable and repeatedly analyzed

- Who was late and when?
- What demurrage costs should be paid?
- Which logistics providers are performing according to contract?
- How accurate are shipment instructions?
- What operational areas can be defined as needing improvement?



Data generated by these systems must be made available to sales/purchase forces and other intermediaries in a way that is instantly comprehensible, actionable and meaningful.

The addition of information delivery will turn CRM/SRM data into actionable insight.

A combination of CRM and information delivery technologies would not only make communication with customers and suppliers more efficient and user-friendly, but would also cut the costs - particularly those relating to administration.

It can also facilitate with viewing each customer by product line, rather than as a single entity.

Technology is a key factor

People are either not using technology or they are using it with ineffective and outdated business processes in place.

Customer Service Centres have put technology in place to log enquiries or complaints, but staff are often not trained to interview the client and companies often have no process to ensure it is passed to the right people to be resolved and for processes to be adjusted.

Although many CRM projects have not lived up to expectations the technology will remain a key factor in gaining competitive advantage.



CRM IS NOT JUST AN IT SOLUTION

Despite several years of technology evolution, rollouts of customer relationship management (CRM) software still pose challenges that are causing many companies to proceed with caution.

Best-in-class IT organizations understand that CRM excellence is not predicated on software implementations alone.

Strategy, integration, deployment, and value measurement are key issues, and market research indicates that clients can have greater success when they tap outside consulting services for these areas.

Customer relationship management strategies go beyond the traditional ERP and logistics approach of manufacturing organizations, by integrating people, process, and technology to optimize relationship management.

The demand for CRM solutions has fuelled development and introduction of new software functionalities and the expansion of previously one-dimensional solutions into broader and more effective suites of products.

Recently, there have been increasing efforts to integrate and merge additional pieces, particularly order management and event management, into CRM suites.

The CRM service providers have evolved beyond the notion that CRM excellence can be achieved through software implementation and have instead focused on value creation through CRM that speaks to client needs and leads to more tactical CRM endeavours.

In contrast, some vendors' CRM offerings require systems integration—a lot of custom programming and a lot of architectural reconstruction—to make the different applications in the suite work together.

Because the various pieces of many competitive offerings have not been engineered to fit together, a systems integrator has to glue them together.



Systems integration is complex, time consuming, and very expensive.

Systems integration labour usually runs at many times the cost of the software or the hardware needed to run the system—and the customer gets to pay for it.

Although CRM "failure" estimates vary dramatically, our research shows that CRM projects often fail to meet expectations due to misalignment between business and IT groups and a lack of internal value measure creation and accountability



HOW CRM VENDOR PRODUCTS SHOULD BE EVALUATED

Most operational CRM vendors do not have a standard functionality that covers the specific needs of the logistics world.

Current CRM vendors have a B2C (Business to consumer) focus.

Most vendors have an origin in the call-centre market and therefore do not have a B2B focus.

Operational, analytical, and collaborative CRM capabilities are the most important performance sub criteria.

The CRM software market has to be divided into 2 parts: the operational and the analytical part.

The fundamental difference between operational systems and analytical systems is that

- **operational systems** are designed to support transaction processing (registration of quotations, visit reports, calls,...)
- whereas **analytical systems** are designed to support online analytical processing (analysis of profitability of traffic line, profitability of customer).

Organizations should look to vendors that can clearly and objectively demonstrate the value of their solutions through customer testimonials and independent audits.

Moreover, organizations must ensure that both business and IT have the same view of "value" and definition of "success".

Strong M&A activity, market consolidation, poor financial results, inability to demonstrate value, and technology change are issues that characterize the current state of the CRM space.

Difficult economic conditions and stakeholder pressures tend to distract vendors' ability to execute effectively. Indeed, several key CRM suite vendors struggled in the last years.



Organizations should use several metrics to benchmark vendor execution:

- ability to integrate acquired products,
- release promptness and quality,
- living up to promises (e.g., functional enhancements, new product introduction),
- ability to provide meaningful customer references, and meeting financial expectations.



LIST OF OPERATIONAL CRM VENDORS`S WEBSITES

This list is not intended to be either comprehensive or complete:

www.epicor.com

www.callpath.com

www.genesys.com

www.applix.com

www.revenuelab.com

www.clarify.com

www.broadbase.com

www.businessobjects.com

www.interactcommerce.com www.icc.com

www.bendata.com

www.trilogy.com

www.peoplesoft.com

www.pivotal.com

www.onyx.com

www.point.com

www.allegis.com

www.epiphony.com

www.ventas.com

www.marketsoft.com

www.pragmatech.com

www.servicesoft.com



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