



# Case Study GlobalTranz TMS





## Background

GlobalTranz was founded in 2003 and has become a leading, technology-based, full-service transportation and logistics provider. Through proprietary technology, they provide dependable, multimodal transportation and logistics solutions to shippers of any size.

Other companies eventually started developing similar technology, and GlobalTranz found itself more of a market driver than a specific competitor. In the end, the baseline technology needed additional flexibility and scalability to handle the company growth. Big Feats was hired to work collaboratively with the GlobalTranz technology and operations teams to redesign the enterprise-level user interface of their new Transportation Management System (TMS) and improve the overall user experience.



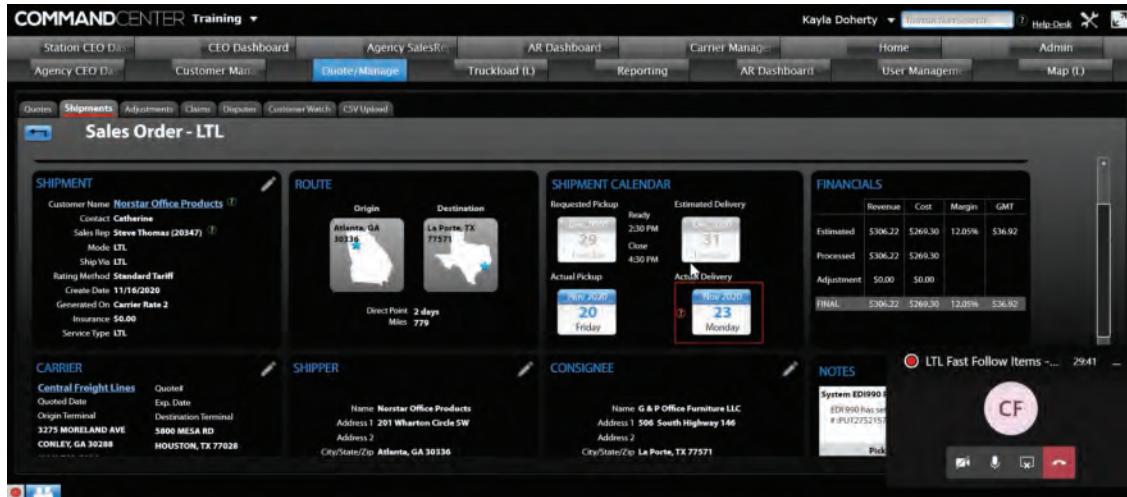
# The Challenge

GlobalTranz experienced massive growth in the shipping industry by creating new problem-solving technology before its competitors. Through sales, customer service and acquisition, the original technology needed additional flexibility and scalability to support the high rate of growth GlobalTranz was experiencing. Buying smaller digital brokers and acquiring complimentary transportation software companies meant GlobalTranz offices were now using multiple software solutions to move goods. There was a need for company-wide standardization to reduce duplication of efforts and inefficient usage of resources.

The pandemic also brought the need for supply chain resiliency to the absolute forefront for GlobalTranz clients and TMS users. GlobalTranz recognized the need to unite users under one standardized system if they were to continue their incredible growth trajectory. The new TMS needed to be brought to the point of a functioning MVP before relaunching company wide.



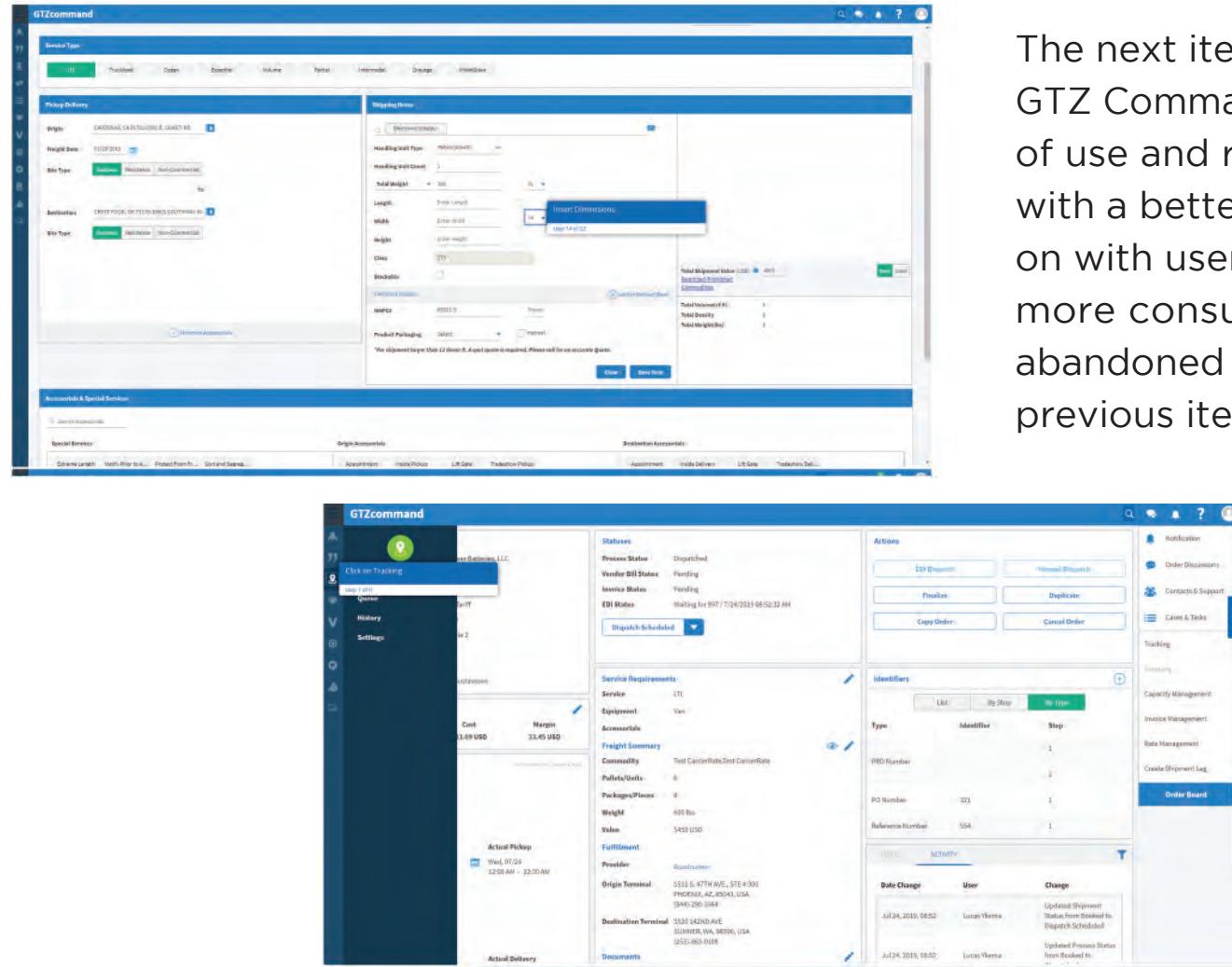
# Command Center 1.0



Shown here is Command Center, the initial software used by GlobalTranz employees and agents. The user experience was created before the rise of Javascript and was showing its age by the 20-teens, but was still in use.



# GTZ Command



The top screenshot displays the 'Picking Details' and 'Shipping Details' sections. The 'Picking Details' section includes fields for Origin (CARMEL, CA 93121-8001), Weight (100.00), and Bin Type (Standard). The 'Shipping Details' section includes fields for Handling Unit Type (Pallet/Unit), Handling Unit Count (2), Total Weight (200), Length (100.00), Width (100.00), Height (100.00), Class (1), and Blockable (checked). A modal dialog titled 'Insert Dimensions' is open, showing 'User 14 of 12'. The bottom screenshot shows the 'Order Board' screen with a tracking map, order status (Process Status: Dispatched, Vendor Bill Status: Pending, Invoice Status: Pending, EDI Status: Waiting for 8977724/233168/52:32 AM), and various service requirements and identifiers.

The next iteration of the GlobalTranz platform, GTZ Command was an attempt to recreate the ease of use and robust capabilities of its predecessor with a better User Experience, but it didn't catch on with users - it was not process-centric, rather, more consumer-centric. The software was abandoned as employees reverted back to the previous iteration.



# Our Task:

Work directly with the GlobalTranz product development team as their lead UX / UI designers and re-design their new web-based Transportation Management Software over the course of 18 months.



# Key Objectives:

- Redesign the web-based TMS User app to be more process-centric, with an interface that is more intuitive and easier to navigate.
- Apply the iterative design process to all pages that comprise the MVP
- Meet key success metrics established by the client
- To be flexible with changes in design direction, functions and content
- To understand the users and stakeholders by immersing ourselves in the UX / CX process
- Extrapolate data through an empathetic interview / discovery approach with stakeholders and report our findings
- Improve on the initial MVP through user testing and implementing our findings



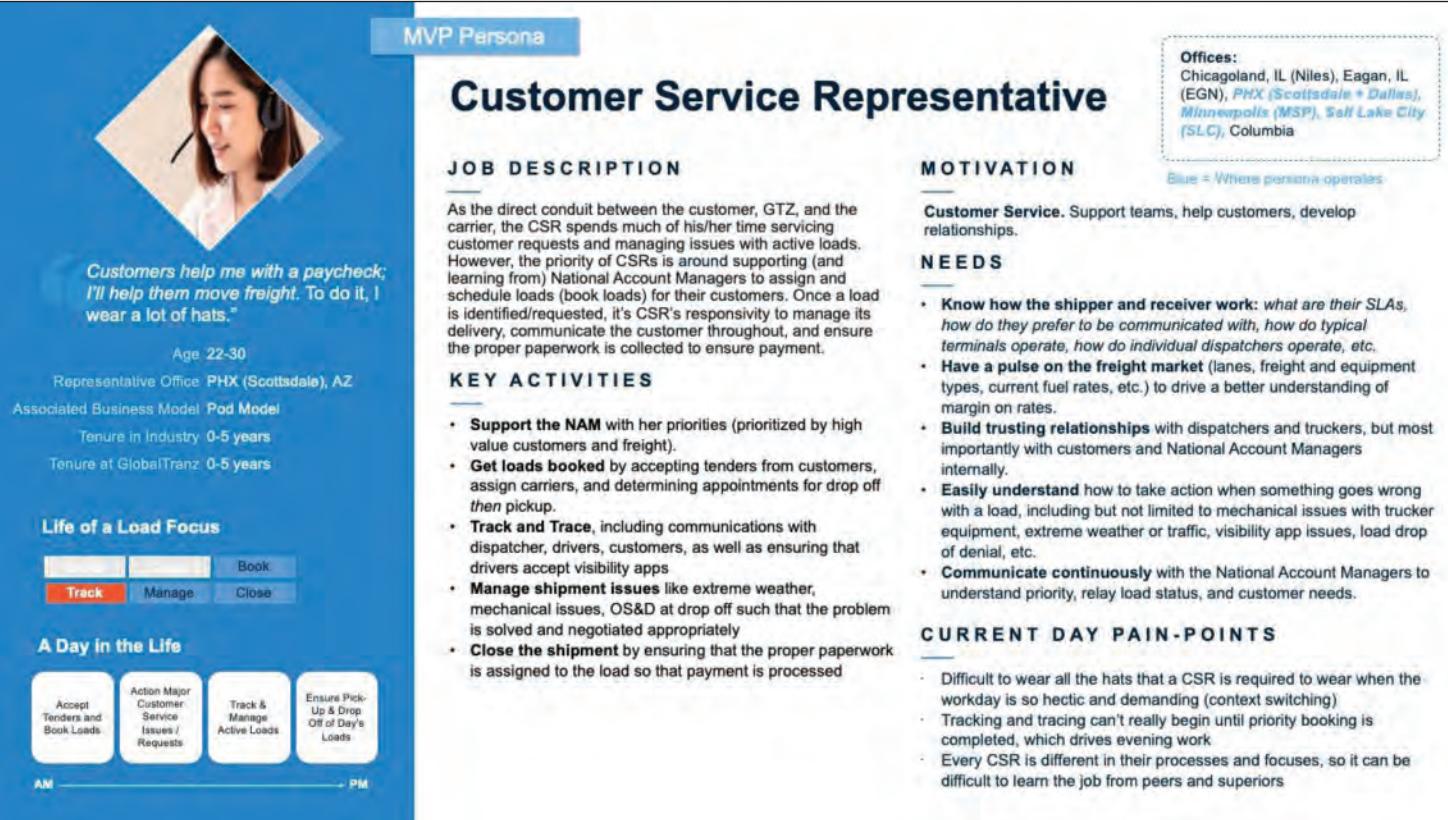
# Key Responsibilities:

- Front End Design UI / Design
- Meet with team leaders each week to discuss progress
- Assist in developing a manageable roadmap
- Through researching their stakeholder's typical day, determine pain points, gather feedback and recommend improvements
- Adapt to changing work methods and (Scrum to Kanban, Jira to Confluence)
- Conduct User Testing to help in the hypothesis validation - carried out during the course of the project
- Implement a structure that GlobalTranz internal designers and their developers could build upon



# User Personas

Big Feats worked with different offices of the GlobalTranz team to help develop and define multiple user personas. It gave the design and development teams better clarity in understanding the specific needs of the different users.



**MVP Persona**

**Customer Service Representative**

**JOB DESCRIPTION**

As the direct conduit between the customer, GTZ, and the carrier, the CSR spends much of his/her time servicing customer requests and managing issues with active loads. However, the priority of CSRs is around supporting (and learning from) National Account Managers to assign and schedule loads (book loads) for their customers. Once a load is identified/requested, it's CSR's responsibility to manage its delivery, communicate the customer throughout, and ensure the proper paperwork is collected to ensure payment.

**KEY ACTIVITIES**

- Support the NAM with her priorities (prioritized by high value customers and freight).
- Get loads booked by accepting tenders from customers, assign carriers, and determining appointments for drop off then pickup.
- Track and Trace, including communications with dispatcher, drivers, customers, as well as ensuring that drivers accept visibility apps
- Manage shipment issues like extreme weather, mechanical issues, OS&D at drop off such that the problem is solved and negotiated appropriately
- Close the shipment by ensuring that the proper paperwork is assigned to the load so that payment is processed

**MOTIVATION**

Customer Service. Support teams, help customers, develop relationships.

**NEEDS**

- Know how the shipper and receiver work: what are their SLAs, how do they prefer to be communicated with, how do typical terminals operate, how do individual dispatchers operate, etc.
- Have a pulse on the freight market (lanes, freight and equipment types, current fuel rates, etc.) to drive a better understanding of margin on rates.
- Build trusting relationships with dispatchers and truckers, but most importantly with customers and National Account Managers internally.
- Easily understand how to take action when something goes wrong with a load, including but not limited to mechanical issues with trucker equipment, extreme weather or traffic, visibility app issues, load drop of denial, etc.
- Communicate continuously with the National Account Managers to understand priority, relay load status, and customer needs.

**CURRENT DAY PAIN-POINTS**

- Difficult to wear all the hats that a CSR is required to wear when the workday is so hectic and demanding (context switching)
- Tracking and tracing can't really begin until priority booking is completed, which drives evening work
- Every CSR is different in their processes and focuses, so it can be difficult to learn the job from peers and superiors

**Offices:**  
Chicagoland, IL (Niles), Eagan, IL (EGN), PHX (Scottsdale + Dallas), Minneapolis (MSP), Salt Lake City (SLC), Columbia

Blue = Where persona operates

**Customers help me with a paycheck; I'll help them move freight. To do it, I wear a lot of hats.**

Age: 22-30

Representative Office: PHX (Scottsdale), AZ

Associated Business Model: Pod Model

Tenure in Industry: 0-5 years

Tenure at GlobalTranz: 0-5 years

**Life of a Load Focus**

Book, Track, Manage, Close

**A Day in the Life**

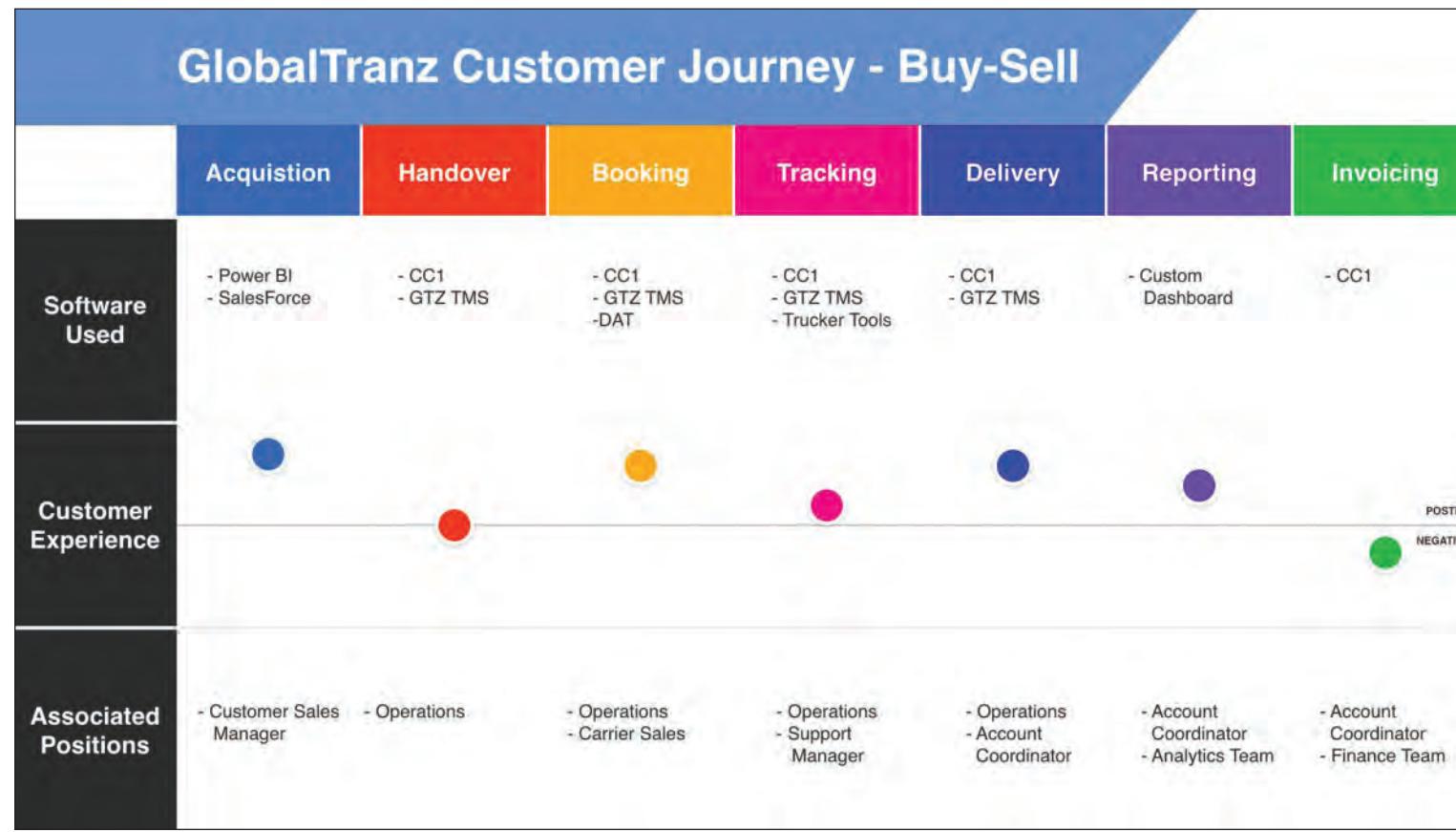
Accept Tenders and Book Loads, Action Major Customer Service Issues / Requests, Track & Manage Active Loads, Ensure Pick-Up & Drop Off of Day's Loads

AM → PM



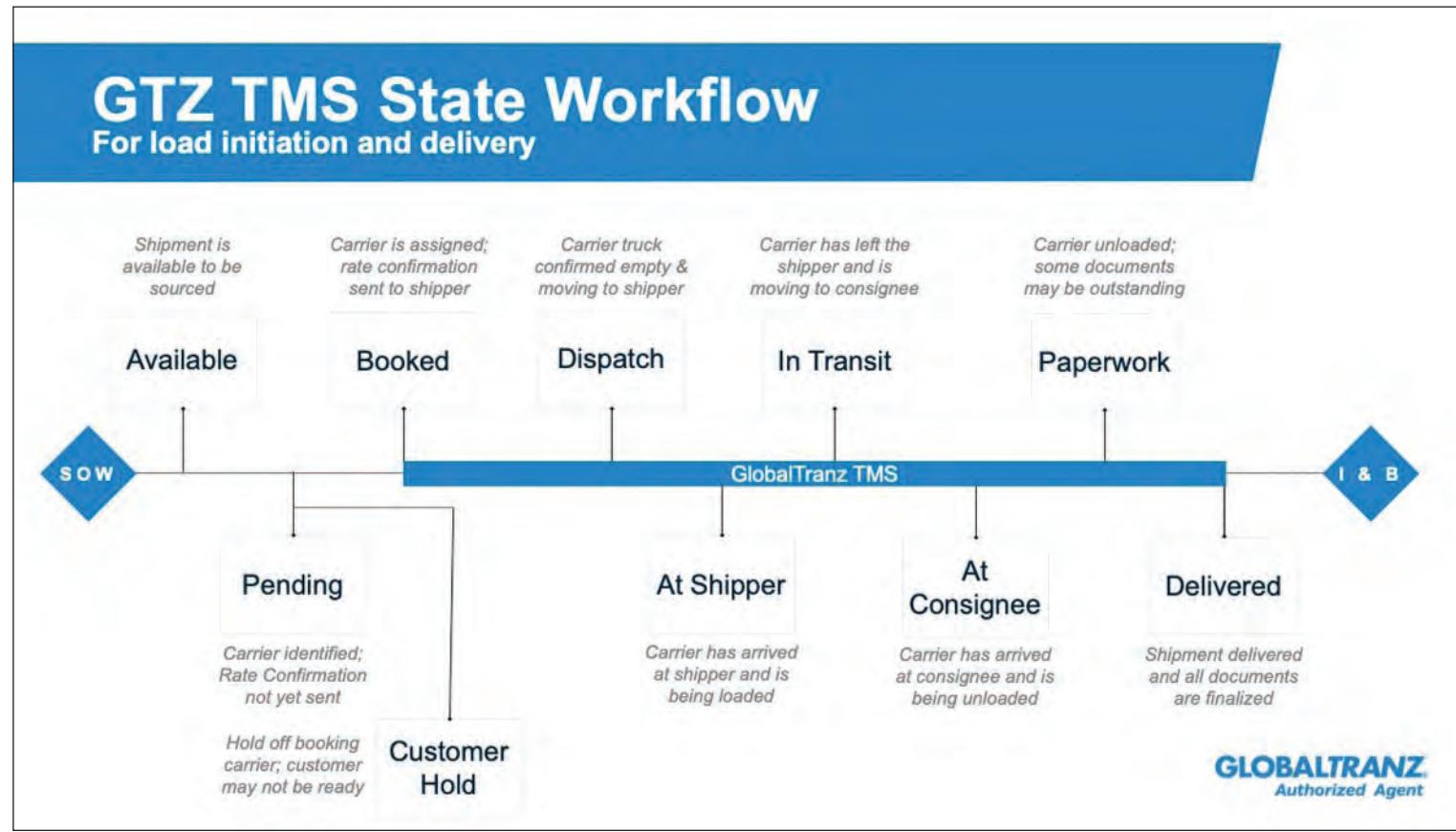
# Customer Journey Mapping

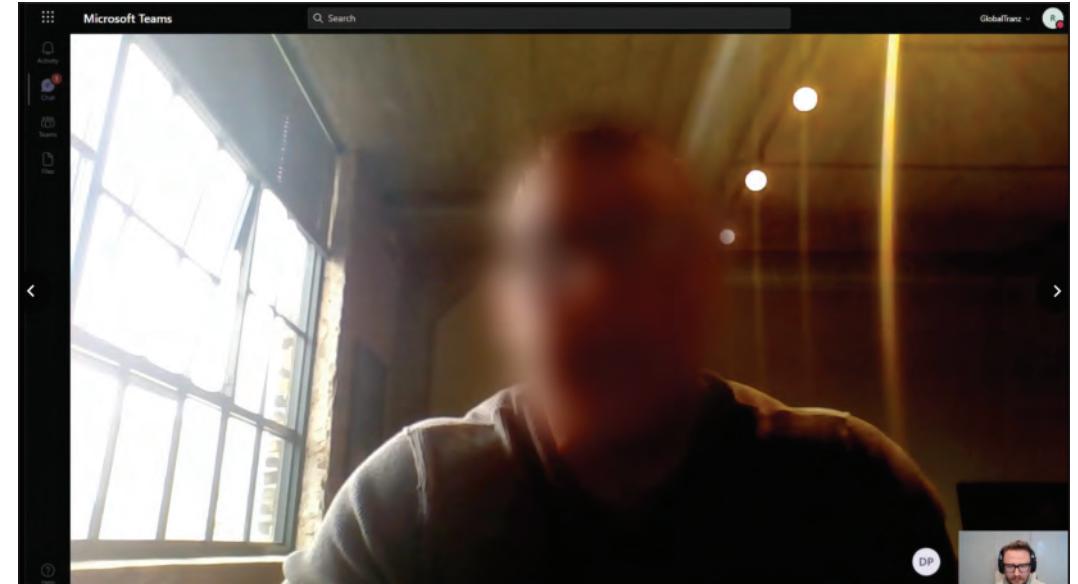
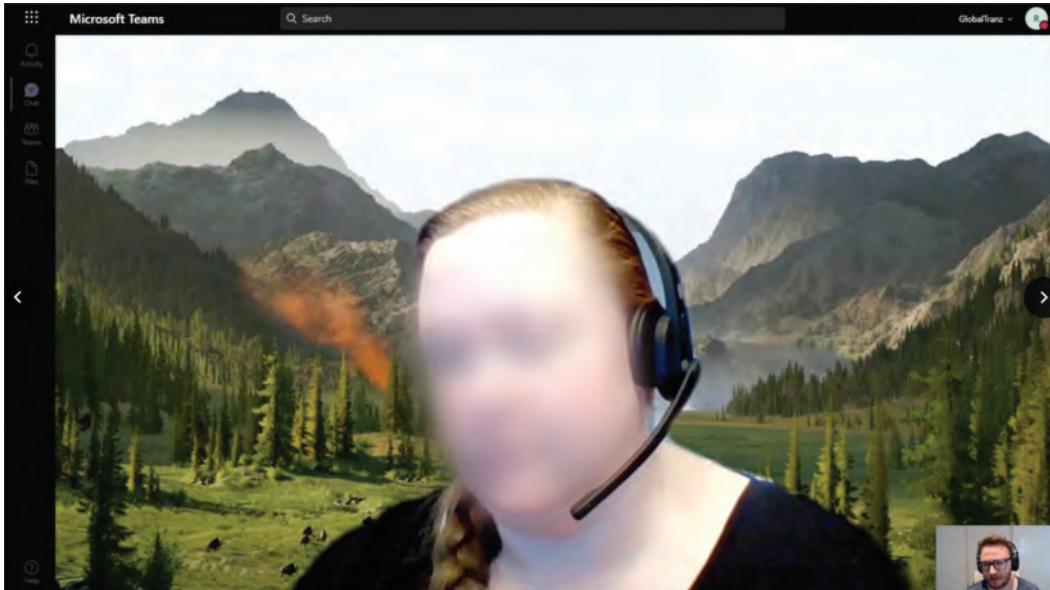
Big Feats created a visual representation of the journey a customer will have while experiencing the GlobalTranz TMS.



# Workflow Mapping

Big Feats mapped the workflow to gain a better understanding of the life cycle of an active load - start to finish.





# CX Interviews

As the project developed, Big Feats was asked to become involved in the CX interview process. We conducted approximately one dozen interviews within the GlobalTranz organization ranging from Managers to Team Leaders to Shipping Agents.



# Key Findings

These findings are collected from the series of interviews written and conducted by Big Feats. Candidates were all employees of GlobalTranz and range from Account Reps and Managers, Sales, Customer Success and Internal Ops. The purpose was to discover ways the new GlobalTranz TMS could be more efficient, streamlined, and become the desirable choice over the current multi-broker software model. Their own user experience was examined, pain points were discovered and ways they think the software and customer experience can improve were recorded.

- Since Covid, many feel people are closer working remotely, sharing more information
- Users want Proactive Automation of mundane day-to-day tasks to allow time to focus on more important tasks
- Cradle-to-Grave Automation for customers on delivery status would be seen as forward-thinking to GlobalTranz customers



# Key Findings (continued)

- Predictive Analytics and Proactive Alerts (eg: Driver won't be on time, load delivered) are being requested
- Management would like the creation of a “Collection of Experts” who can share specific knowledge across all branches, eg: Similar load verticals: Frozen Foods
- There's a need for proper training on the new TMS, eg: a beta office
- Wider, more efficient use of EDI and its capabilities not only for alerts, but for analytics and decision-making
- Better EDI can lead to enterprise-level partnerships with preferred software companies that bring outside benefits to the GlobalTranz TMS, like, but not limited to: DAT.com or TruckerTools
- Rating Cards (like Uber's “Rate your Driver”) would be a very effective tool for choosing carriers and negotiating rates - another direct benefit of more fluid EDI
- Customer Service is the core of GlobalTranz



# GlobalTranz TMS Redesign

The screenshot displays the GlobalTranz TMS Redesign interface. The main header reads "GLOBALTRANZ". The top navigation bar includes a search icon, a list icon, a message icon, a calendar icon, a user icon, and a help icon. The main content area is organized into several sections:

- Sales Order BOL# 18472391**: This section contains "Network Info" (Customer: Durflame, Inc., BOL# 18472391, Contact: Wayne West, Rating Method: Manual), "Service Requirements" (Service: LTL, Accessorials: Black Mountain, NC: Appointment Delivery), "Fulfillment" (Provider: GREAT LAKES CARGO INC, MAS Code: BS846, Truck #: 123, MC No.: 026767, Dispatcher: BOJAN CUDÉ, Trailer: #11B, Driver: Jake), and a "Finalize" dropdown menu with options like REMOVE CARRIER, COPY ORDER, CANCEL ORDER, and HOLD ORDER.
- Freight Summary**: Shows Commodity (Seasoning Spices), Packages/Pieces (942), Weight (42717 lbs), and Pallets/Units (55, Value: \$13000 USD).
- Route Details**: Details the route from "Origin → 125 Creekview Drive, Monticello, KY 42633" to "Destination → 345 s Kino Parkway, Tucson, AZ 85719". It includes "Actual Pickup" (Mon, 10/07, Check In: Mon, 10/07 12:00 AM, Check Out: Mon, 10/07 12:00 AM) and "Actual Delivery" (Mon, 10/07, Check In: Mon, 10/07 12:00 AM, Check Out: Mon, 10/07 12:00 AM).
- Detailed Financials**: A table showing financial items like Shipping Service, Discount, Fuel Charge, Guaranteed Delivery, and Cargo Insurance, along with their descriptions, costs, and revenue.
- Financials**: A table showing financial metrics: Estimate (\$979), Processed (\$979), Adjustment (\$979), and Finals (\$979). It also includes columns for Revenue, Cost, Profit %, and Margin.
- Identifiers**: A table showing identifiers: Identifier (1234, 929184, 138143), Type (PRO Number, PO Number, Reference Number), and Stop (O, D).

At the bottom of the interface are buttons for "CREATE NEW ORDER", "DUPLICATE ORDER", "VIEW E-TENDERS", and "ORDER BOARD".

These first two designs represent the very first iterations of the new GlobalTranz TMS UI based on initial feedback from the stakeholders.



# GlobalTranz TMS Redesign

The screenshot displays the GlobalTranz TMS Redesign interface, featuring a modern, clean design with a dark header and light blue accents. The main sections include:

- Create Quote:** A form for entering shipping details, including Customer (Shipper LLC), Service Type (Truck Load), Currency (USD), Shipment Type (Line Item), Equipment Type (Vehicle), and Temp Range (10° to 100°). It also includes fields for Shipping Items (Community Description, Weight Type, Enter Weight, Units, Stackable, Hazardous), Handling Unit Type (Holding Unit), and Prices (Length, Width, Height, Units, Density).
- Route Details:** A section for defining the route, showing the Origin (122 Main Street, New York City, NY), Pick Up Date (2023-01-01), and Delivery Date (2023-01-02). It includes tabs for Business, Residential, and Non-Commercial, and buttons for Open, Close, and Save.
- Sales Order:** A summary of the sales order, including Total Shipment Value (USD) and Total Weight (123 lbs).
- Accessories & Special Services:** A section for selecting special services, with tabs for Origin, Destination, and Equipment, and buttons for Add to Quote and Submit.
- Quote Summary:** A detailed summary of the quote, including the carrier (Averitt Express), total shipment value (\$400), and delivery details (Baton Rouge, LA, 70815, 2023-01-02, 34 lbs).

On the left side, there are navigation icons and a sidebar with sections for Sourcing (Truck Loads, History, G/T, Carrier Source), Shipping Items, and Carriers. The Carriers section lists various carriers, including XPO Logistics, Averitt Express, and Southeastern Freight Lines, with their respective rates and insurance options.



# GlobalTranz TMS Redesign

Once we began user testing, we discovered we should brighten the overall UI layout. While containing the same amount of information, it gave users the sense of cleaner organization.



# GlobalTranz TMS Redesign



# GlobalTranz TMS Redesign

The screenshot displays the GlobalTranz TMS Redesign interface. The top navigation bar includes the GlobalTranz logo, a search bar, and a menu icon. The main header is "Sales Order Board" with tabs for "TRUCKLOAD" (selected) and "LTL". Below the header is a filter bar with columns: Quote ID, Age Minutes, BS User, Can Get, Cost, Cost/mi, DEL #, Delivery Date, Destination City, Destination State, Equipment Type, Equipment Length, Origin City, and Origin State. A "MANAGE BOARDS" button is also present. The main content area is divided into several sections: "Network Info" (Customer: Durafame, Inc., Sales Rep: PHX - Darrel Young, Created Date: 10/4/2019, Service Type: Truckload, Shipment Type: Dedicated), "Route Details" (234 miles (1 Transit Days), Origin: 125 Creekview Drive, Monticello, KY 42633, Destination: 345 s Kino Parkway, Tucson, AZ 85719), "Financials" (Actual Cost: \$2560000.71, Max Buy: \$2560000.71, Revenue: \$256.71, Target Cost: \$256.71, Margin: \$0.00, Price to Beat: \$256.71, Margin %: 0), "Freight Details" (Commodity Description: Bricks-50, Handling Unit Type: Pallets (40X48), Handling Unit Count: 2,500 lbs, Weight: 478, # Pallets: 1, # Pieces: 1), "Equipment / Service" (Service: Partial, Assessorials: Drop Trailer Shipper, Equipment: Intermodal, Drop Trailer Consignee: Pallet Exchange, Length: 20 feet, Tradeshow), and "Notes" (User Name: 13.05 - 12/20/2020, Notes: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy enim tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy enim tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren.). Below the main content are two lists of shipment details and a pagination bar.

We were also able to streamline the number of tools in the left hand menu.



# Achievements

LTL, TL Functional Mockup creation



Kanban process developed on Jira



Began Customer Journey Maps



Encouraged collaborative relationship  
with devs



Became part of  
Grooming/Discovery Process



Helped to develop a “Design Culture”



## Q.A. UX Process - Functional Prototyping & Testing

Finished MVP Design for LTL and TL

Conducted a series of user interviews (discovery) over a cross section of the company + issued online surveys

Laid out plan for CX:  
- User Journeys  
- Behavioral Analytics  
- User Surveys  
- AB Testing and User Engagement

Involved in planning the rolling-in of all products into the TMS



Listed Areas with Notable Findings:

- Customer/Carrier Scorecards
- Billing/Accounting Inefficiencies
- Sales/Operations Handover
- TMS Performance Metrics
- Apprehension of new TMS until features are complete and bugs worked out

All items placed in Confluence

Uncovered 50+ actionable items related to the TMS and customer experience

Helped implement a structure to build upon moving forward

Successful Handover - end of June, 2021





375+

Screens Produced

# Thank You

