



# 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.

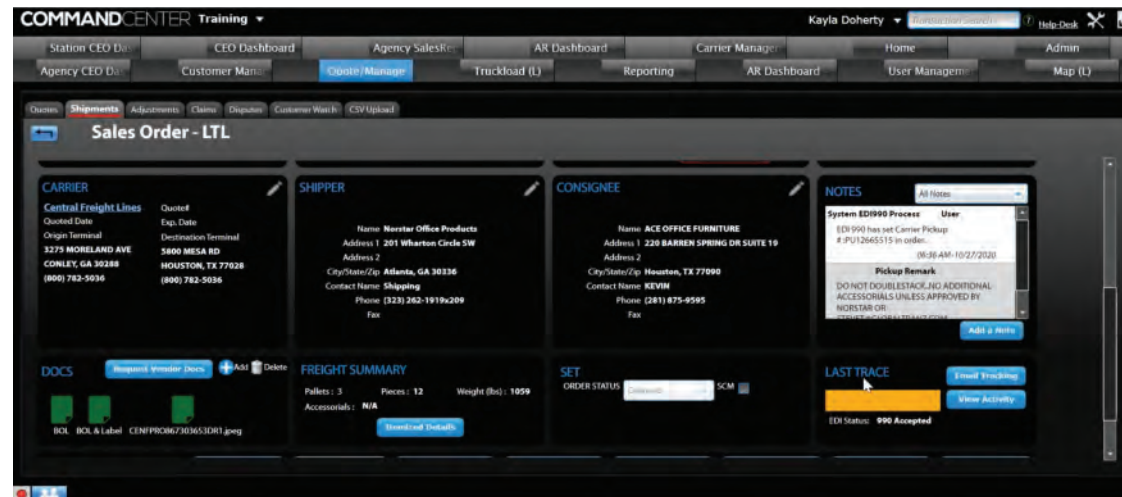
The pandemic also brought the need for supply chain resiliency to the absolute forefront for GlobalTranz clients and TMS users. GlobalTranz recognized the need to unite users under one standardized system if they were to continue their incredible growth trajectory. The new TMS needed to be brought to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



# Command Center 1.0

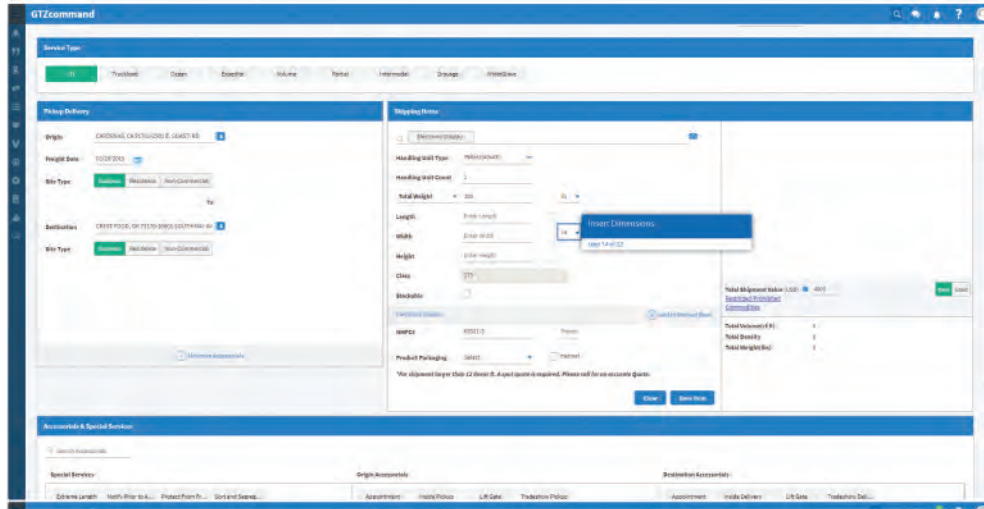


Shown here is Command Center, the initial software used by GlobalTranz employees and agents. The user experience was created before the rise of Javascript and was showing its age by the 20-teens, but was still in use.

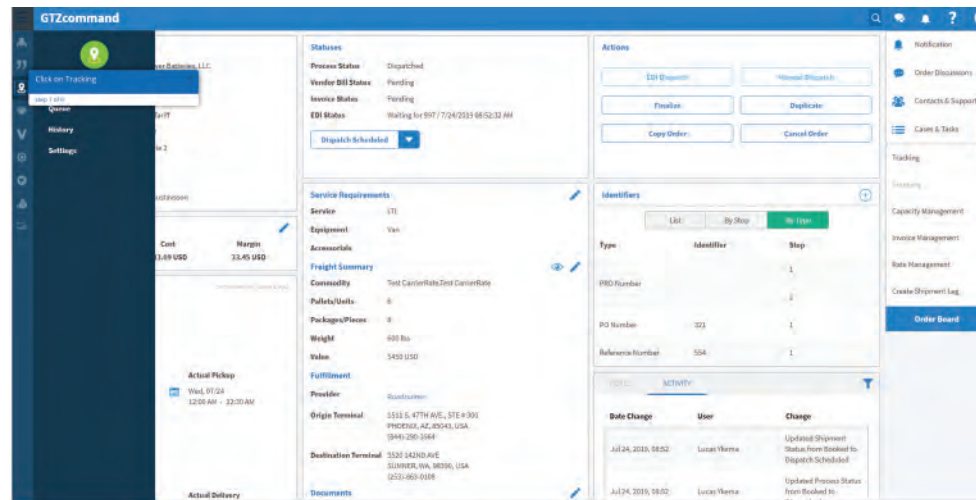




# GTZ Command



The 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**

*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**

Track Manage Close

**A Day in the Life**

AM PM

Accept Tenders and Book Loads

Action Major Customer Service Issues / Requests

Track & Manage Active Loads

Ensure Pick-Up & Drop Off of Day's Loads

## 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 responsivity 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

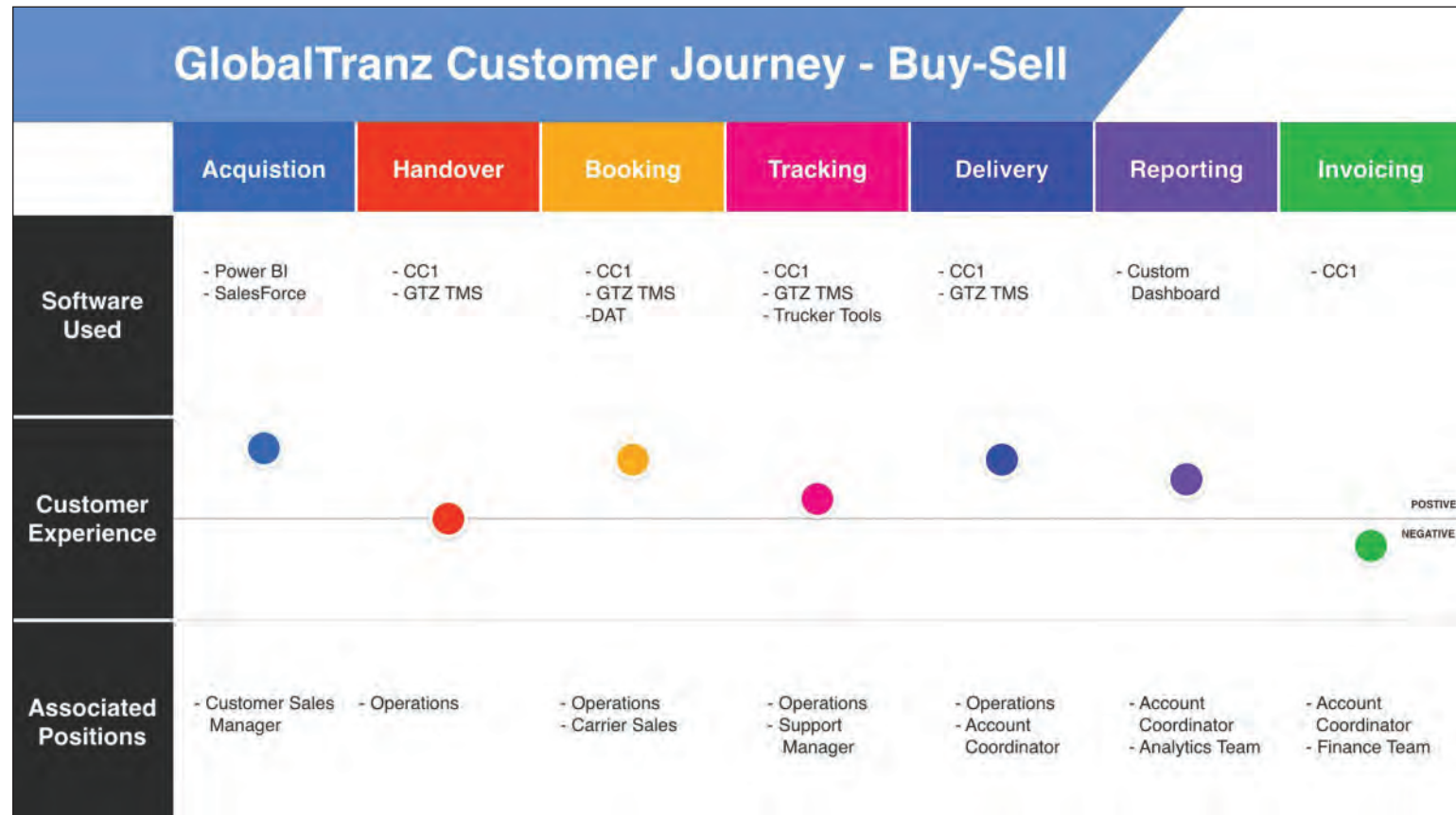
**Offices:**  
Chicagoland, IL (Niles), Eagan, IL (EGN), PHX (Scottsdale + Dallas), Minneapolis (MSP), Salt Lake City (SLC), Columbia

Blue = Where persona operates



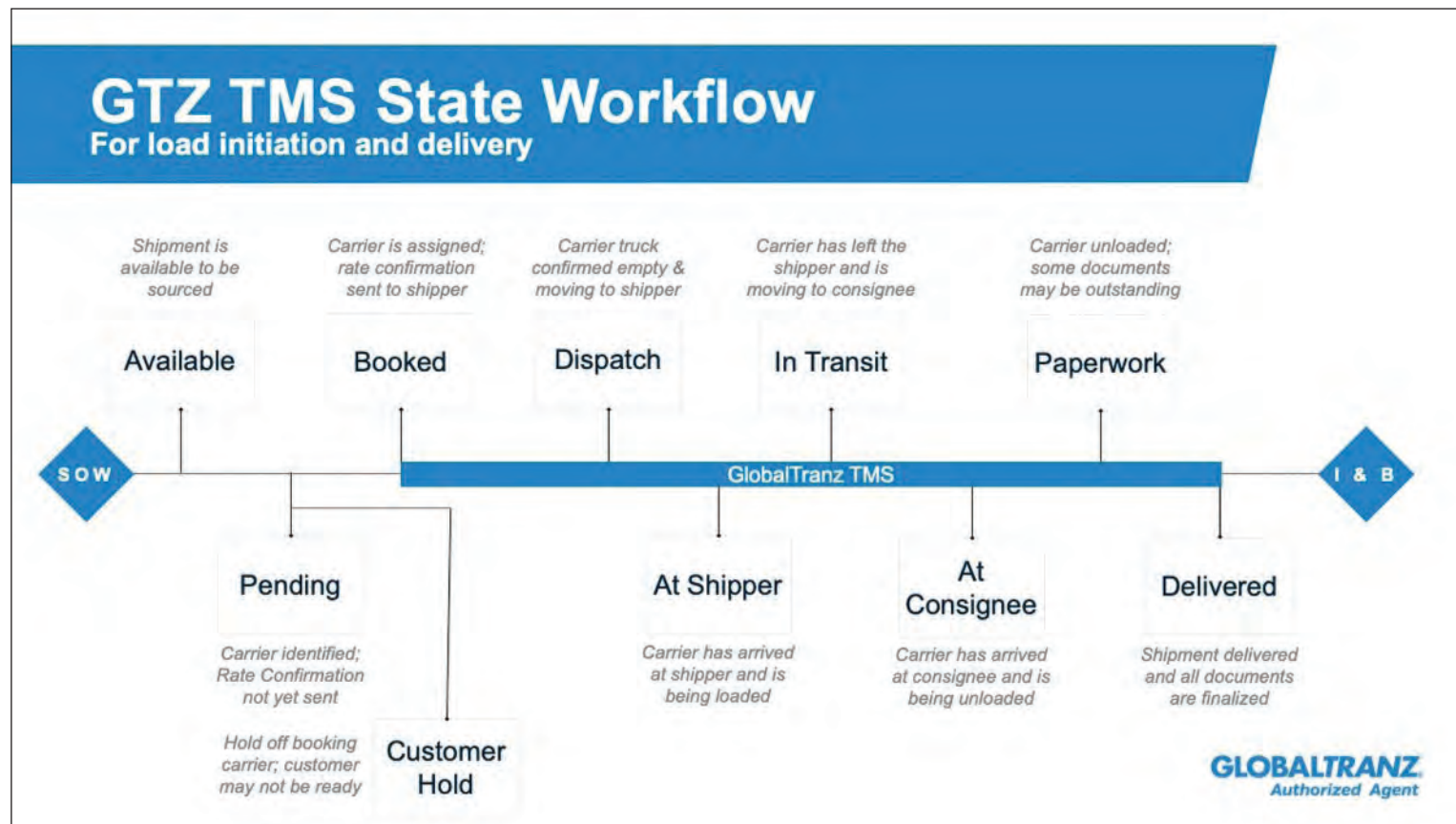
# Customer Journey Mapping

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

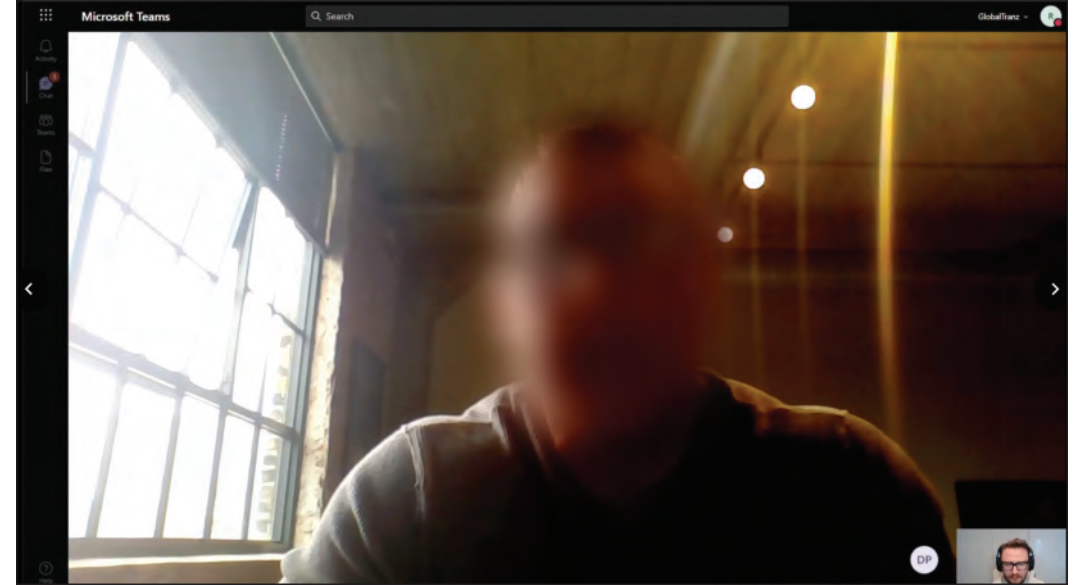
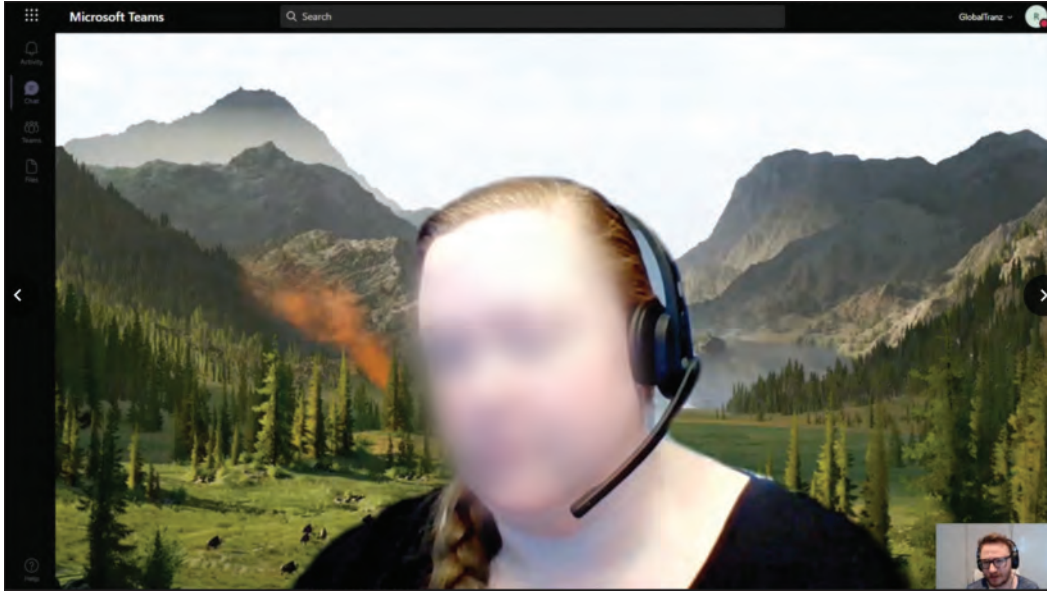


# Workflow Mapping

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 carries and negotiating rates - another direct benefit of more fluid EDI
- Customer Service is the core of GlobalTranz





# GlobalTranz TMS Redesign

GLOBALTRANZ

SALES ORDER BOL# 18472391

Customer

Duraflame, Inc.

BOL#

18472391

Contact

Wayne West

Rating Method

Manual

Created Date

10/4/2019

Generated ON

Command Center

Quote Request

#13038865

Shipment Type

Dedicated

Booked By

PHX - Jacob TenEyck

Sales Rep

PHX - Darrel Young

Service Requirements

Service

LTL

Accessorial

Black Mountain, NC: Appointment Delivery

Equipment

Van

Freight Summary

Commodity

Seasoning Spices

Packages/Pieces

942

Weight

42717 lbs

Pallets/Units

55

Value

\$13000 USD

DOT No.

3006335

Destination Terminal

1871 W GRANT RD  
TUCSON, AZ, 85745, USA  
(520)-792-4902

Provider

GREAT LAKES CARGO INC

MAS Code

BS846

Truck #

123

MC No.

026767

Dispatcher

BOJAN CUDE

Trailer

#11B

Driver

Jake

Origin Terminal

2427 MORELAND AVE SE  
ATLANTA, GA, 30315, USA  
(404)-635-3200

Route Details

Origin → 125 Creekview Drive, Monticello, KY 42633

Destination → 345 s Kino Parkway, Tucson, AZ 85719

234 miles (1 Transit Days)

Company Name

Duraflame/Cowboy

Appointment

Mon, 10/07  
07:00 AM- 04:00 PM

Actual Pickup

Check In Mon, 10/07 12:00 AM  
Check Out Mon, 10/07 12:00 AM

Company Name

Stock yards Tucson

Appointment

Mon, 10/07  
07:00 AM- 04:00 PM

Actual Delivery

Check In Mon, 10/07 12:00 AM  
Check Out Mon, 10/07 12:00 AM

Phone

(606)-340-0771

Detailed Financials

Items	Description	Cost	Rev	NMFC	Class	Weight	PCS	Dimensions	Package Type	Pts	Haz
Shipping Service	Cleaning Compounds	1172.00	2012.50	405678	60	1000	200	40 48 0	Pallets (40x48)	5	
Discount	Discount	-1172.00	2012.50								
Fuel Charge	Fuel Surcharge	72.00	93.54								
Guaranteed Delivery	Guaranteed	52.00	57.54								
Cargo Insurance	Insurance	10.00	10.00			1000	200				
Total		\$ 431.53	\$ 498.76			10000	200				

Network Info

Customer

Duraflame, Inc.

BOL#

18472391

Contact

Wayne West

Rating Method

Manual

Created Date

10/4/2019

Generated ON

Command Center

Quote Request

#13038865

Shipment Type

Dedicated

Booked By

PHX - Jacob TenEyck

Sales Rep

PHX - Darrel Young

Process Status

Completed

Invoice Status

Invoiced

Vendor Bill Status

Cleared

EDI Status

Not Available

DELIVERED

USER NOTES

ACTIVITY

MSP - Rachel Johansen

Per Marjorie, the driver attempted at 2:33PM EST and was told no freight, she wasn't able to get me a name of who the driver spoke too. Back on board for pickup today.

Finalize

Remove Carrier

Copy Order

Cancel Order

Hold Order

Approval

Insurance Certificate

Request Vendor Docs

Download All

Financials

	Revenue	Cost	Profit %	Margin
Estimate	\$979	\$929	5.11%	\$50
Processed	\$979	\$929	5.11%	\$50
Adjustment	\$979	\$929	5.11%	\$50
Finals	\$979	\$929	5.11%	\$50

Identifiers

LIST	BY STOP	BY TYPE
Identifier	Type	Stop
1234	PRO Number	O, D
929184	PO Number	O
138143	Reference Number	O

CREATE NEW ORDER

Duplicate Order

VIEW ETENDERS

ORDER BOARD

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

The logo for Big Feats Creative, featuring the text "BIG FEATS" in a bold, sans-serif font above the word "Creative" in a script font, all enclosed within a decorative border.

[illegible]

# GlobalTranz TMS Redesign

[illegible][illegible]

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.





G	GLOBALTRANZ <sup>®</sup>																			
Sales Order Board																				
TRUCKLOAD				LTL																
PENDING	QUOTED	EDI TENDERS	MY SHIPMENTS	AVAILABLE	ACTIVE OFFERS	IN TRANSIT	PAPERWORK	ALL SHIPMENTS												MANAGE BOARDS
Quote ID	Age Minutes	BS User	Can Get	Cost	Cost/ml	DEL #	Delivery Date	Destination City	Destination State	Equipment Type	Equipment Length	Origin City	Origin State							
T	T	T	T	T	T	T	T	T	T	T	T	T	T							
17904127	27	PHX - Kevin Lahey	● YES	\$2356	\$23	12345	02/02/2020	Los Angeles	CA	FiaRbed	53	Chicago	IL							
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17904127	27	PHX - Kevin Lahey	● YES	\$2356	\$23	12345	02/02/2020	Los Angeles	CA	FiaRbed	53	Chicago	IL							
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17904127	27	PHX - Kevin Lahey	● YES	\$2356	\$23	12345	02/02/2020	Los Angeles	CA	FiaRbed	53	Chicago	IL							
17904127	27	PHX - Kevin Lahey	NO	\$2356	\$23	12345	02/02/2020	Los Angeles	CA	FiaRbed	53	Chicago	IL							
17904127	27	PHX - Kevin Lahey	NO	\$2356	\$23	12345	02/02/2020	Los Angeles	CA	FiaRbed	53	Chicago	IL							
17904127	27	PHX - Kevin Lahey	NO	\$2356	\$23	12345	02/02/2020	Los Angeles	CA	FiaRbed	53	Chicago	IL							
17904127	27	PHX - Kevin Lahey	HO	\$2356	\$23	12345	02/02/2020	Los Angeles	CA	FiaRbed	53	Chicago	IL							
17904127	27	PHX - Kevin Lahey	NO	\$2356	\$23	12345	02/02/2020	Los Angeles	CA	FiaRbed	53	Chicago	IL							
17904127	27																			



GLOBALTRANZ

Sales Order Board

TRUCKLOAD

LTL

MANAGE BOARDS

PENDING

QUOTED

EDI TENDERS

MY SHIPMENTS

AVAILABLE

ACTIVE OFFERS

IN TRANSIT

PAPERWORK

ALL SHIPMENTS

Quote ID

Age Minutes

BS User

Can Get

Cost

Cost/ml

DEL #

Delivery Date

Destination City

Destination State

Equipment Type

Equipment Length

Origin City

Origin State

17904127	27	PHX - Kevin Lahay	YES	\$2356	\$23	12345	02/02/2020	Los Angeles	CA	Flatbed	53	Chicago	IL
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Set Load Status in Transit

SAVE

CANCEL

COPY

Open Throttle

NEW

Network Info

Customer

Duraflame, Inc.

Created Date

10/4/2019

Sales Rep

PHX - Darrel Young

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

Company Name

Duraflame/Cowboy

Appointment Not Set

Mon, 10/07

Phone

(606)-340-0771

Company Name

ABC Company Inc.

Appointment Set

Mon, 10/07

Phone

(606)-340-0771

7:00 AM- 04:00 PM

Actual Pickup

Check In

Check Out

Check In Pending

Check Out Pending

Actual Delivery

Check In

Check Out

Check In Pending

Check Out Pending

Financials

QUOTE IT

Actual Cost

\$2560000.71

Revenue

\$256.71

Margin

\$0.00

Margin %

0

Max Buy

\$2560000.71

Target Cost

\$256.71

Price to Beat

\$256.71

Freight Details

Commodity Description

Bricks-50

Handling Unit Type

Pallets (40X48)

Handling Unit Count

2,500 lbs

Weight

478

# Pallets

1

# Pieces

Equipment / Service

Service

Partial

Assessors

Drop Trailer Shipper

Equipment

Intermodal

Drop Trailer Consignee

Length

20 feet

Pallet Exchange

Tradeshow

Notes

User Name

13:45 - 10/09/2020

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy eirmod 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, consetetur sadipscing elitr, sed diam nonummy eirmod 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.

17904127	27	PHX - Kevin Lahay	NO	\$2356	\$23	12345	02/02/2020	Los Angeles	CA	Flatbed	53	Chicago	IL
17904127	27	PHX - Kevin Lahay	NO	\$2356	\$23	12345	02/02/2020	Los Angeles	CA	Flatbed	53	Chicago	IL

First

Prev

1

of 20

Next

Last

The logo for Big Feats Creative features a stylized red and white sunburst or fan-like graphic above the text "BIG FEATS" in a bold, white, sans-serif font. Below "BIG FEATS" is the word "Creative" in a smaller, italicized, white script font. The entire logo is set against a dark background.

# Achievements

LTL, TL Functional Mockup creation



Began Customer Journey Maps



Became part of  
Grooming/Discovery Process



Kanban process developed on Jira

Encouraged collaborative relationship  
with devs

Helped to develop a “Design Culture”





Q.A. UX Process -  
Functional Prototyping & Testing

Laid out plan for CX:

- User Journeys
- Behavioral Analytics
- User Surveys
- AB Testing and User Engagement

Finished MVP Design for LTL and TL

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

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



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

