

## INDUSTRY | DISTRIBUTION (3PL)



A long-tenured provider of customized third-party logistics (3PL), direct-to-consumer (DTC) eCommerce fulfillment, omni-channel distribution, comprehensive transportation management, and retail compliance services.

#### Challenge

As a major 3PL services provider that manages complex logistics, Barrett Distribution relies on its teams to work in tandem to fulfill customer requests. However, before 2023, employees did not have a supportive channel for online communication or cross-functional collaboration.

- Teams lacked a dedicated collaboration channel and used a mix of tools (e.g., Teams, Zoom Chat, email) to communicate
- Employees had to “swivel” between their messaging tools and customer care systems, which led to inefficiency and delayed case resolution

Barrett Distribution wanted to enable more productive teamwork by migrating onto Slack and taking full advantage of the platform’s collaboration capabilities. Strategic goals included:

- Positioning Slack as a scalable channel for cross-team collaboration
- Driving high adoption + user enthusiasm through good change management
- Defining a clear, user-friendly process for submitting IT + Nonconformity Report (NCR) cases directly within Slack
- Use automation to ensure seamless Case submission/management across Slack and Service Cloud

#### Solution

We helped Barrett Distribution establish Slack as its primary collaboration platform, created Slack workflow automations that would support the company’s business processes, and provided change management support to maximize user adoption. Our team:

- Migrated existing Case submission functionality from Salesforce Screen Flow to Slack Form Workflow Automation
- Created a Slack Canvas where users can select + interface with all Case types; configured mappings between Slack + Service Cloud to ensure seamless record creation, updates, and notifications
- Used targeted Slack comms to build enthusiasm for the initiative
- Created a Business Process Plan to outline steps + expectations for Case submission; delivered a Reinforcement Plan to sustain adoption
- Created a Governance Plan to ensure security + compliance



#### PRODUCTS USED



#### Outcome

Post-project, our client is able to:

- Solidify Slack as its dedicated collaboration platform
- Drive efficiency and enable more productive cross-functional teamwork
- Maximize user adoption and drive ROI on its Slack/Service investment

