



Route Manager
by WORKWAVE[®]

PLAYBOOK

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OVERVIEW OF PLAYBOOK

The WorkWave Route Manager Sales Playbook contains the basic information needed by a sales representative to be able to sell WorkWave Route Manager. The purpose of this guide is to aid in the sales process; it does not explain technical details of the product. By the end of this guide, a sales representative will be able to position, demonstrate, and sell WorkWave Route Manager.

WORKWAVE COMPANY INFORMATION

Company Mission

WorkWave helps mobile workforce companies in the field service, transportation and logistics industries mitigate the key pain points they face every day. This allows them to save money, save time, and improve customer service, all at the same time.

WorkWave's fully-integrated suite of cloud-based software, mobile software, and marketing services solutions allow companies of any size to easily estimate jobs, schedule and route mobile workers, and service and bill customers with ease.

About Us

WorkWave provides comprehensive field service management solutions that connect every facet of a business through its unified, easy-to-use platforms. The company's suite of solutions allows field service professionals across industries to easily attribute and automate sales and marketing activities, improve back-office efficiency, and increase visibility into field operations through its mobile solutions. WorkWave's platforms provide over 8,000 customers an unprecedented level of business insight and information, enabling them to streamline efficiency, increase revenue, and provide an exceptional customer experience. Founded in 1984, WorkWave has been recognized with multiple awards for its outstanding products, growth, and culture, including the Inc. 5000, SaaS Awards, and IT World Awards. WorkWave has also been named a Best Place to Work by NJBiz and Inc. Magazine. For more information, visit www.workwave.com.

WorkWave's award-winning culture and solutions have been recognized in



2020 WWRE International Business Award



2020 RM Food & Logistics Award + 2019 & 2018



2019 SaaS Awards for Shipping, Inventory or Vehicle Logistics + 2018



2019 Stevie Awards for Great Employers - Bronze Winner



2020 Top 50 SaaS CEOs - David Giannetto

WorkWave Route Manager Overview

WorkWave Route Manager is a cloud-based route optimization and tracking solution. Route Manager provides a unique approach to route optimization that increases profitability by reducing operational costs, generates more revenue by freeing up time for more stops per driver, and improves logistical operations by increasing efficiency.

IDENTIFYING THE RIGHT TARGETS

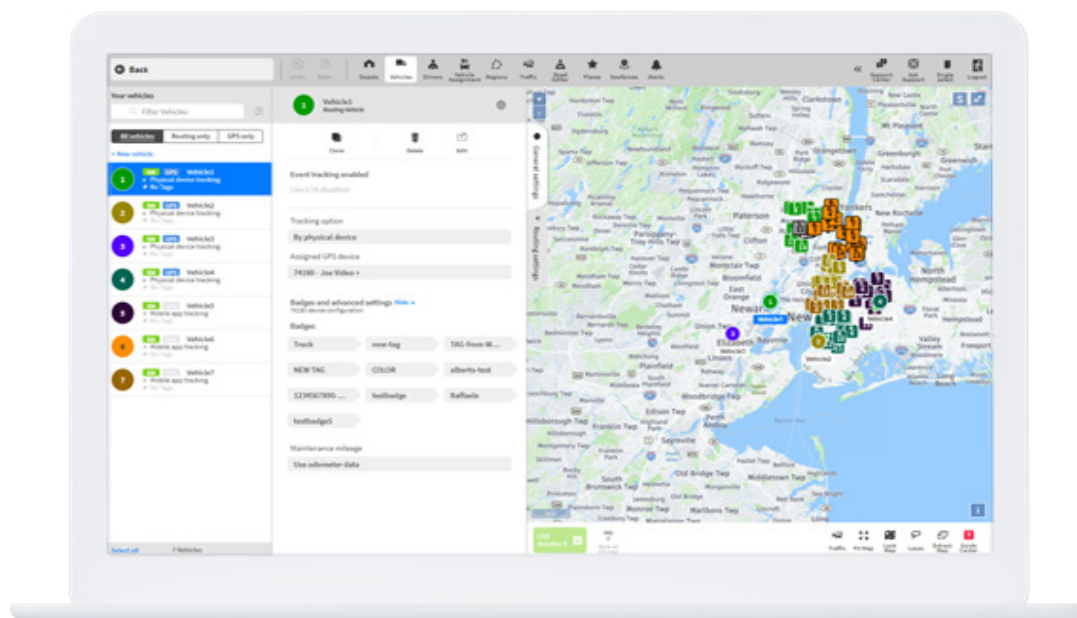
Company

The ideal WorkWave Route Manager customer company is growing and has a need to optimize the route planning process. Usually, the company has very little structure for dispatching and routing. They may even be doing their current routing manually.

The ideal company will have dynamic routes, meaning they have a different plan every day. While Route Manager has many static route customers—meaning they have the same routes daily—there is not as much value in the product for them.

The average number of managed assets (vehicles or technicians) in the ideal customer company is 10-50; we can manage many more if the total number of vehicles is subdivided into clusters of vehicles (called territories). Our largest fleets have thousands of vehicles and our smallest customers have single vehicles.

The software works globally and is available in many languages. If needed, we can add additional languages.



IDENTIFYING THE RIGHT TARGETS

Buyer Personas

There are a wide range of decision makers and personas involved in the software evaluation process. The best person to address in terms of business needs is the person in charge of planning, usually an operation manager or a planner. The decision maker, on the other hand, will most likely be an owner or head of technology. The economic value will need to be stressed, as opposed to emphasizing the time savings.

The table below shows some of the key buyer personas and the key challenges:

Job Title	Segment	Key Challenges	Key Benefits
Owner	Small	<ul style="list-style-type: none">• They are usually route planning themselves• Need to increase bottom line• Focused on customer satisfaction	<ul style="list-style-type: none">• Build efficient route plans in minutes• Do more with the same resources• Provide better service to your customers (on-time arrival, same day, etc.)
Ops Manager	Medium	<ul style="list-style-type: none">• Time to market (resources)• Saving time/money• Real-time delivery• Increase visibility/productivity• Optimization/analytics	<ul style="list-style-type: none">• Easy to get started and train team• Efficient routes in minutes so you can focus on strategy• All-in-one solution• Meet customer demands
President/ CEO	Medium	<ul style="list-style-type: none">• Time to market (resources)• Focused on growth/profits• Maximizing resources	<ul style="list-style-type: none">• Easy to get started• Maximize productivity and efficiency• ROI from day one• Scales with your business
Head of IT	Large	<ul style="list-style-type: none">• Scalability and security• Onboarding and integration• Service quality	<ul style="list-style-type: none">• Get started in one day (no installation)• Free support and training• Free API access for integration• 30% ROI
Head of Ops	Large	<ul style="list-style-type: none">• Scalability• Dynamic planning• Increasing visibility/productivity• Adaptability and integration• Service quality	<ul style="list-style-type: none">• They are usually route planning themselves• Need to increase bottom line• Focused on customer satisfaction
GM	Large	<ul style="list-style-type: none">• Scalability• Increasing visibility/productivity• Adaptability and integration• Service quality	<ul style="list-style-type: none">• All-in-one solution, no messy integrations• Little IT effort required, plug right into processes/workflow

SALES TOOLS

Elevator Pitch

Route Manager is a software tool for multi-day, multi-vehicle route planning and execution. The software empowers companies struggling with manual planning or tracking of their orders. Our solution, suitable for small and large companies, is a turnkey SaaS with a short learning curve for both office and field staff.

Largest Problems Solved



Spending hours planning routes, and reclaiming that time is important.



Excessive overtime is being clocked in by your drivers.



Customer service is overwhelmed by customers looking for ETAs and updates, resulting in three wasted business hours per day.



You are turning business away because of growth, losing out on servicing five new clients a week.



No insight into your vehicles' status and spend countless hours per day on the phone or texting drivers for updates.



Difficult to plan around time and capacity constraints, which equals wasted space in your vehicles, hours of idle time, and missed delivery windows.

Key Features of the Software

Below is a list of key features of WorkWave Route Manager 360. **This is not an exhaustive list,** but can be referred to to understand some core functionality of the product.

- Route planning and optimization
- Multi-vehicle planning
- Time window planning
- Open APIs
- Traffic editor
- Road editor
- Role-based account access
- Integrated mapping
- Driver app (iOS & Android)
- Dispatch capabilities
- Performance dashboards
- Automated customer notifications (email & SMS)
- GPS tracking via smartphones
- Proof of delivery
- Arrival/departure times
- Barcode scanning
- Planned vs. actual reporting

SALES TOOLS

Sales Flow Overview

Our sales teams have found success in breaking down the sales process into three areas: qualifying prospects, providing product demonstrations, and post-demonstration follow-ups. The tools for each section below can be used to bring in new sales.

Qualifying Prospects

After targeting and identifying a prospective client, it is important to have an initial qualifying conversation before providing a software demonstration. This discovery call, or needs assessment, has a four-fold goal:

- 1 Make sure the prospect is a good fit for the software.
- 2 Create a sense that you are an industry expert.
- 3 Identify their pain points to highlight during the product demonstration.
- 4 Build anticipation and excitement for the demonstration

Below are some qualifying questions to help in this process:



Company Assessment

- Can you describe to me what your company does?
- Who are you against in the market?
- How many vehicles do you have to manage?
- Is your fleet owned or outsourced?
- How are you currently planning routes?
- What city/region/geographic territory do you operate within?
- How many orders/customers do you serve per day?
- Do you already have technology in place for routing or tracking your fleet?
If so, which one?
- Do you have an order management system or CRM? If so, which one?

SALES TOOLS



Feature Needs

- Do you need to respect time windows when delivering?
- How do you communicate routes to your drivers?
- Do you need to increase your delivery rate?
- Do you need to collect proof of delivery?
- How often do your routes change? Every day/week/month?



Pains

- What do you want to improve in your delivery process?
- Is it important to arrive on time at your stops?
- How long does the planning process last?
- Are you able to measure the quality of your delivery activity?
- What is your experience with last-minute delivery/pickup planning?



Economic Impact

- Do you have penalties for late delivery?
- What is your cost model (per stop, per km, per vehicle)?
- Do you have a defined budget for this project?



Risk of No Action (usually not in a written message)

- If you are not compliant to a standard, are you risking fines or penalties?
- Can you afford not to have control over your fleet?
- Will staying with your existing provider expose your customers to problems?
- Are you responsible in case of delivery problems?



Compelling Events

- Do you have a deadline for the project?
- Do you need to comply with certain regulations?

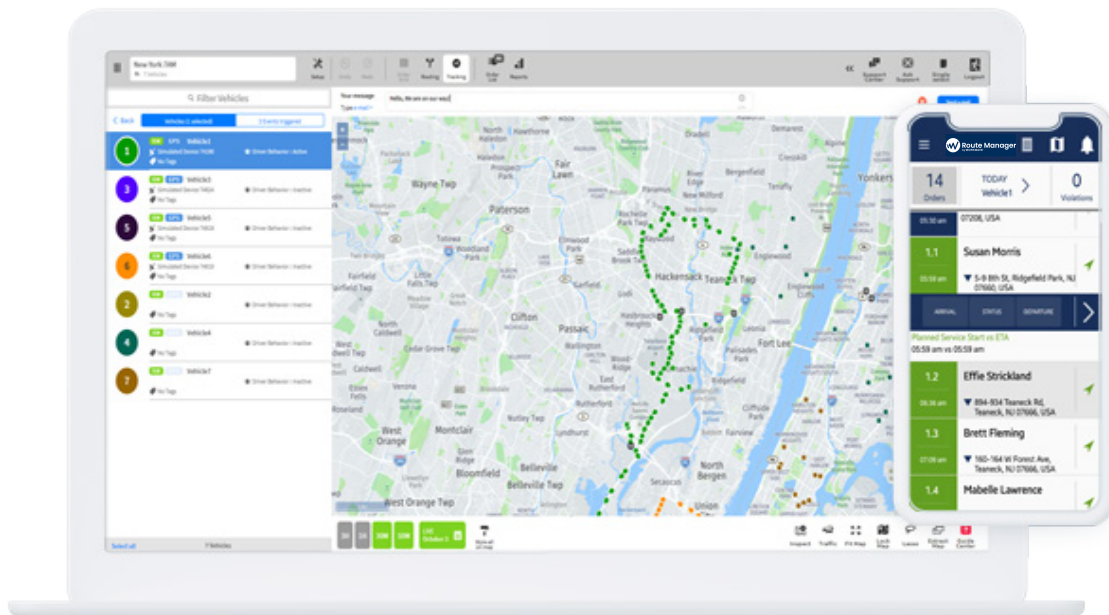
SALES TOOLS

Sales Process

- What is the timeline?
- Where is the budget for this project coming from?
- Is the company willing to make a change?
- Are there predefined decision criteria?
- Are there alternatives to not proceeding?

Prospect Role

- Where are you in the process of evaluating options?
- How will you decide?
- Who else in the company cares about this project?



SALES TOOLS

Demo

The product demonstration is often the most important opportunity to win over the decision makers involved in the software evaluation process. Before the demonstration, it is important to configure the software to the customer's needs and highlight how their pain points can be solved. If possible, try to get access to your prospect's data in order to model their business case within WorkWave Route Manager.

There are a wide variety of tools available to assist in setting up a product demonstration on the WorkWave Partner Portal. Below you can find a basic script for a simple 20-30 minute demonstration:

NEW YORK – Demo Tools Territory

- Make sure you are using a Full HD monitor, go full screen (F11), and open New York.
- Set expectations as to what you will show. The demo should focus more on what the product does rather than how it does it, so settings and constraints should only be touched on superficially.
- Present Interface
 - Three main areas: map, scheduler, left panel
 - Overview of tabs: Scheduler, Order Grid, and Order List. Leave the others for later.
 - From Order Grid, show how columns can be customized and mention that the same applies to Scheduler. Give an example.
- Explain how to import orders (Support will assist), talk to relevant constraints.
 - Open one order by double clicking on Map or Scheduler and quickly present (**NOTE:** double click works when in Single-Select mode) Eligibility, Service Time, and Time Windows. Mention other constraints in detail only if you know they are relevant to the customer.
- Explain how order constraints are matched to vehicle characteristics.
 - Throuduce the Vehicles Setup area and give a brief overview. Point out that Support will assist. Mention common constraints such as start/end location and working hours; hint at load if relevant.
- For both Orders and Vehicles, focus more on what is mandatory to avoid overwhelming prospects. Be ready to enter a deeper level of detail if asked.
- **Optimize and remind optimization goals**

SALES TOOLS

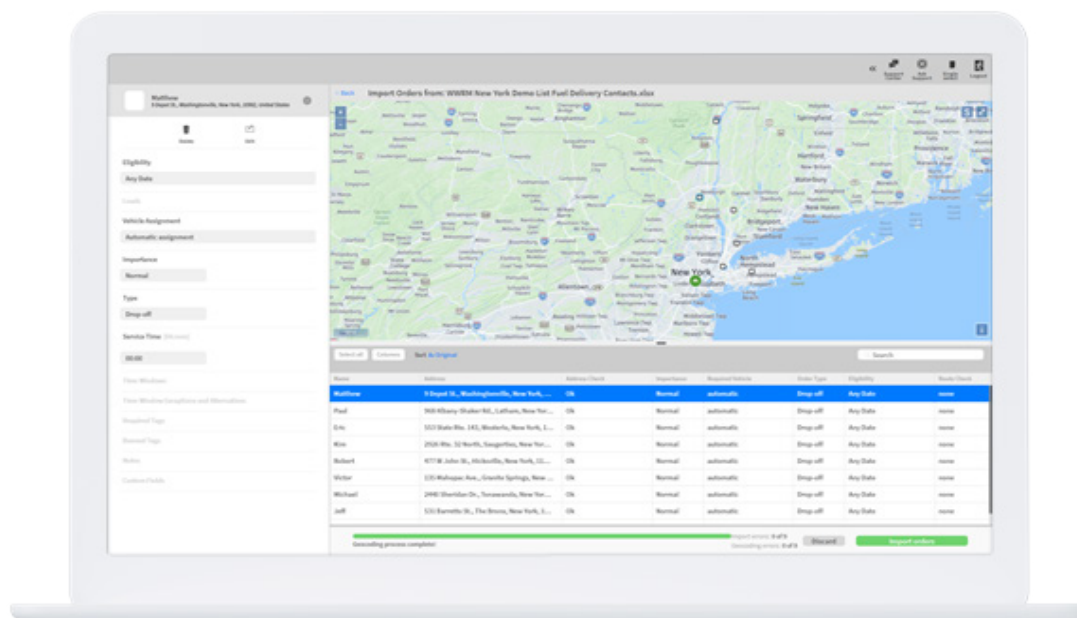
NEW YORK – Demo Tools Territory (cont'd)

- Reinforce our value proposition: this is a tool to automate the heavy lifting and support the decision-making process.
- Show map controls to show how they can customize visualization.
- Show **Navigo**, the main point of access for analysis:
 - Basic interaction: select one order (order 12 route 1) and show details, collapse scheduler, and show persistent selection.
 - More advanced flows: from depot, to vehicle, to route, to orders.
 - Show different interactions on different entities (e.g. select one route, reverse, undo, move to orders, limit selection, etc.)
 - Lasso orders, show selection in Navigo, and un-assign them. Cancel selection, show how you can quickly recuperate it from Plan Summary by clicking on unassigned orders.
- **Extract map:** Show the value of creating real estate for larger fleets in Scheduler and focusing on what counts. Show popped out map in sync with original tab.
- If changes to the routes have been made, reoptimize and go back to original routes. Apply now to start from a clean slate.
- Select routes 1 and 6; pop out routes from Navigo to focus on them.
- Drag & Drop order 1 Vehicle 6 (Wesley Riley) between orders 1 and 2 of Vehicle 1
 - Highlight violation, show details by hovering over it, and explain how the sequence is not re-optimized but only adjusted after manual modification.
- Show Plan Summary (interactive) and Comparison tool:
 - Apply Now timer is paused, giving you time to explore.
 - Show main summary (current situation), then show at the top preceding steps.
 - Highlight how bars represent steps in chronological order but also refer to individual parameters (default is Cost).
 - Click on the preceding version (show summary with now values for now vs preceding version).
 - Click on “Compare all versions” to show deltas between now and the preceding version.
 - Load selected version. “If you understand that the version preceding your modification was better after all, you can jump back to it.”

SALES TOOLS

NEW YORK – Demo Tools Territory (cont'd)

- Return to the concept that they are in control. Go to Setup area and talk to Advanced Planning tools (regions, traffic, road editor).
- Explain how when plan results are okay it is time to Approve and Dispatch.
 - Point out how Approving a plan means taking a snapshot of the routes as you would like them to be executed and using that snapshot as the baseline for any planned vs. actual analysis.
 - The Approve & Dispatch button will also send routes to driver mobile apps associated with those routes.
- Log in as Driver 1 (route 1), show the mobile app, and check into order #1. Highlight sync between the field and the office. Illustrate PODs. Mark order as Done and check out one hour after check in to generate a violation.
 - **Note:** Prior to the demo, make sure a driver is associated with Vehicle 1 and check username and password under “Driver” setting; change if necessary.
- Show how the longer service time on Scheduler is represented and how all the other ETAs are rescheduled + violation.



AFTER DEMO

After completing the software demonstration, it is important to set concrete follow-up steps with the prospect and remind them of the value that the product can bring to their business.

Below is an example of a follow-up email after a demonstration:

Good [Morning/Afternoon] [Name],
Thanks again for taking the time to speak with me about your business needs and goals.

I've recapped our conversation below and ask that you take a moment to review it. I'll be using this document as a guide as we go through the evaluation process, and your feedback is critical to ensuring that I'm providing a solution that addresses your business objectives. More importantly, this is a critical first step to the delivery of a targeted solution and helping you to achieve your goals.

Current Business Environment & Needs Improvement Areas

You related to me that you are evaluating field-service solutions due to [what they are looking to achieve based on current anxiety (avoid negative here, highlight a positive need or result)]. With the current system and processes in place, the team is still challenged with [a somewhat manual process, overtime issues, and decreased customer satisfaction due to missed deliveries due to time constraints]. In addition, reporting on [metrics/planned versus actual/etc] is not as easy or as robust as needed for [Company Name].

Proceed to list their Core Issues, their Ideal Solution, and then any monetary or time value that the solution can provide them. Finally, list out the exact next steps to close, such as below:

Discovery [Date Completed];
Demo [Date Completed/Scheduled];
2nd Round Demo [Date/if necessary];
Order Form Submission and Legal Review [Date TBD];
Defining Refined Timeline [Date TBD];

FEEDBACK

If you have any questions, concerns, feedback, or success stories, please contact the WorkWave Partner team. The Partner Team wants to add your successes to this document to assist others in their business growth.