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# WorkWave Route Manager Sales Manual

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## OVERVIEW

The document contains the basic information for a new sales hire to be able to sell WWRM

This is not related to the technical skills on the product, it is just a sales guide.



## WorkWave

### Company Mission

**WorkWave company mission is to be the leader in end to end software to support field service companies.**

### Storytelling Workwave

WorkWave was founded 35 years ago to help the pest market in the USA, after many technical acquisitions it has become one of the market leaders in the mobile workforce management industry. WorkWave currently has XXX customers

In 2017 it was acquired by the Swedish company IFS, the world leader in the field service software.

WorkWave Route Manager is one of the core product of WorkWave and is the only solution marketed outside US.

#### Official WorkWave description

WorkWave, a division of IFS's Service Management business unit, 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 their 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 increase 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, IT World Awards and Best Place to Work by NJBiz and Inc. Magazine. For more information, visit [www.workwave.com](http://www.workwave.com).

#### About IFS

IFS™ develops and delivers enterprise software for customers around the world who manufacture and distribute goods, maintain assets, and manage service-focused operations. The industry expertise of our people and solutions, together with commitment to our customers, has made us a recognized leader and the most recommended supplier in our sector. Our team of 3,500



employees supports more than 10,000 customers worldwide from a network of local offices and through our growing ecosystem of partners. For more information, visit: [IFSworld.com](http://IFSworld.com)

## Some numbers



Route manager has about 1000 customers and manages about 11000 vehicles every day

## Identify Right Targets

The right target prospects for WorkWave Route Manager

### Company

The ideal customer company is growing and has a need to optimize the route planning process.

Usually, it is a not structured company where planning is done manually or through free tools like GMaps.

The company does a different planning every day, if routes are static usually we bring low value.

The average number of managed assets is 10-50. we can manage many more if the total number of vehicles is subdivided in clusters of vehicles (called territories).

We cover all the world, but China and Japan and some forbidden countries ( not commercially interesting).

The product is translated into Spanish, Italian, Polish, and Portuguese, and if needed can be easily translated into other languages.

### Key Buyer Personas

The best person to address in terms of business needs is the person in charge of planning, usually an **operation manager or a planner.**

Her life is bad because he has to wake up early to plan and she is responsible for all the planning. If she falls sick then the entire process is blocked.

In terms of economic needs **the owner of the company,** usually also the decision maker, has to be addressed because, together with process improvement WWRM can bring huge savings.

The table contains other personas

Job Title	Segment	Key Challenges	Key Benefits
Owner	Small	<ul style="list-style-type: none"> <li>• They are usually route planning themselves</li> <li>• Need to increase bottom line</li> <li>• Focused on customer satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>• Build efficient route plans in minutes</li> <li>• Do more with the same resources</li> <li>• Provide better service to your customers (on-time arrival, same day, etc.)</li> </ul>
Ops Manager	Med	<ul style="list-style-type: none"> <li>• Time to market (resources)</li> <li>• Save time/money</li> <li>• Real-time delivery</li> <li>• Increase visibility/productivity</li> <li>• Optimization/analytics</li> </ul>	<ul style="list-style-type: none"> <li>• Easy to get started with &amp; train team</li> <li>• Efficient routes in minutes - so you can focus on strategy</li> <li>• All-in-one solution</li> <li>• Meet customer demands</li> </ul>
President/CEO	Med	<ul style="list-style-type: none"> <li>• Time to market (resources)</li> <li>• Focused on growth/profits</li> <li>• Maximizing resources</li> </ul>	<ul style="list-style-type: none"> <li>• Easy to get started with</li> <li>• Maximize productivity &amp; efficiency</li> <li>• ROI from day 1</li> <li>• Scales with your business</li> </ul>
Head of IT	Large	<ul style="list-style-type: none"> <li>• Scalability &amp; security</li> <li>• Onboarding &amp; integration</li> <li>• Service quality</li> </ul>	<ul style="list-style-type: none"> <li>• Get started in 1 day (no installation)</li> <li>• Free support and training</li> <li>• Free API access for integration</li> <li>• 30% ROI</li> </ul>
Head of Ops	Large	<ul style="list-style-type: none"> <li>• Scalability</li> <li>• Dynamic planning</li> <li>• Increase visibility/productivity</li> <li>• Adaptability &amp; integration</li> <li>• Service quality</li> </ul>	<ul style="list-style-type: none"> <li>• Get started in 1 day</li> <li>• All-in-one solution</li> <li>• Little IT effort required, plug right into processes/workflow</li> <li>• Better &amp; faster output/results</li> </ul>
GM	Large	<ul style="list-style-type: none"> <li>• Scalability</li> <li>• Increase visibility/productivity</li> <li>• Adaptability &amp; integration</li> <li>• Service quality</li> </ul>	<ul style="list-style-type: none"> <li>• All-in-one solution, no messy integrations</li> <li>• Little IT effort required, plug right into processes/workflow</li> </ul>

## Sales Weapons

### E-mail Templates

For the first touch on new Lead coming from the web

*Hi xxxxx ,*

*Thank you for your interest in [WorkWave Route Manager](#).*

*I received your request for contact on our website, and I am sure we can help <your company> optimize its route planning.*

*We have many similar customers but I would like to know exactly your needs.*

*I am xxxxx, sales manager for WorkWave.*

*I will try to call you for a short discovery call.*

*Regards*

### Assessment

After the call or the positive email response, we usually qualify the customer with some probing questions or an email like this.

*Hi,*

*To better address your needs, could you please answer some questions about your business?  
(just send a small subset of these depending on the vertical)*

- *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?*
  - *Fleet is owned or outsourced?*
  - *How are you planning now?*
  - *Which geography?*
  - *How many orders/customers do you serve per day?*
  - *Do you already have a technology for routing/tracking your fleet? If so which one?*
  - *Do you have an order management system or a CRM? If so which one?*
- *Feature needs*

- Do you need to respect **time windows** when delivering?
- How do you **communicate** the 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?
  - Staying with your existing provider will expose your customers to problems?
  - Are you responsible in case of delivery problems?
- *Compelling events*
  - Do you have a deadline for the project?
  - Are you in need to comply with regulation?
- *Sales process*
  - What is the timeline?
  - Where the budget for this project comes from?
  - Is there the company willing to make a change
  - Are there predefined decision criteria?
  - Are there other options 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?



## Demo

Then we propose to showcase a demo

*Hi,*

*thank you for your attention during our call today.*

*As agreed, I will show you a short demo of the product next week on <agreed date>.*

*You will shortly receive an invitation to connect with my demo room. [we use gotomeeting]*

*You can also download the driver's mobile application for [Android](#) or [iPhone](#) to see what could be the driver's view of the calculated routes and experience first hand how Route Manager will change your day.*

*Sending me an example orders sheet would greatly help me tailor my demo on your needs. If possible send it some days in advance.*

## After demo

After the demo, a recap email is sent containing many information and the pricing

*Good [Morning/Afternoon] [Name]-*

*Thanks again for taking the time to speak with me about your route-optimization 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 to helping you to achieve your goals.*

## Current Business Environment & Needs Improvement Areas

*You related to me that you are evaluating route-optimization and visibility 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].*

#### Core Obstacles

- *2 hours are spent planning routes, and reclaiming that time will be important;*
- *Excessive overtime is being clocked in by your drivers—an estimated 20 hours per week;*
- *Customer service is overwhelmed by customers looking for ETAs and updates resulting in 3 wasted business hours per day;*
- *You are turning business away because of growth, losing out on servicing 5 new clients a week;*
- *You have no idea what your vehicles are doing once they leave on their routes, and you spend 3 hours a day on the phone or texting drivers to check statuses;*
- *It's very difficult to plan routes around [time requirements/capacity requirements], resulting in [20% wasted space in your vehicles/over 2 hours of idle time each day/15 missed delivery windows a week].*

*From my conversation with you, I understand the ideal solution will include:*

- *A turn-key platform where you can be up and running in just a handful of hours;*
- *Scalable & flexible based on your growth—you can confidently understand when it is time to put a new vehicle on the road;*
- *A system that provides optimized and driver-friendly routes;*
- *Easy-to-use APIs that will allow for [XXXXXX;]*
- *Optimization that takes into account [time constraints/vehicle capacity/unique skills];*
- *The provision of dynamic ETAs and customer-route status updates for easy CSR reference;*
- *Analytics to easily compare planned and actual results.*

*The value of a successful roll-out will **\*What we are returning to the client IF we could solve their problems and needs - the value we are bringing to them\****

- *See reduced mileage and wear and tear on your vehicles, saving you \$500 a month in fuel;*
- *Allow for you to service and deliver to 5 more customers or clients a day;*
- *Provide transparency into all aspects of the routing and execution processes, allowing you to always know where your vehicles are;*
- *Help avoid potential revenue loss and increase client [satisfaction/retention] with improved arrival-time accuracy and expectations;*
- *Provide you with the tools needed to analyze current route metrics, plan, and test what-if scenarios and individual route performance to assist with the new business being brought on.*

*We also discussed the activities we would need to complete before you can move forward and they are:*

- *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];*

## Power Statement

It is important to give a clear message stating what we do to help the customer, and not be generic. We position ourselves as a premium product so we should highlight value:

*[description]*

**WorkWave Route Manager is a cloud software solution helping small and medium-sized companies manage end to end their planning and dispatching process.**

*[addressable market]*

**Our customers come to us when they are challenged to manage the last mile experience of their on-field activities and are pressed to automate their planning processes.**

*[pains removed/problems solved]*

**For Example:**

- **When they want to reduce planning times from hours to minutes**
- **When they need to do cost savings while being challenged to serve more and more customers**
- **When the planning process needs to be automated in case the planner is absent**
- **When they need to manage “last minute” activity**
- **When they want to regain control of fleet and know what is happening in real time**

*[offering]*

**WorkWave offers a SAAS solution to plan routes, dispatch the planned routes to the drivers/operators and to collect real-time information on field activities, with the possibility to reschedule routes and manage day by day issues.**

*[differentiators]*

- **Our solution can be adopted in hours, bringing immediate benefits, it is easier to use than many competitors**
- **Our solution is able to manage the many constraints of your business like no other tool can do**
- **Our pricing model is based on the value, we do not price maps, support or APIs**
- **Our support is done by humans that will help you, not autoresponders.**

*[take action]*

**What about seeing a demo of the product in action?**

## Elevator Pitch

- RM is a software a tool for multiday/multivehicle route planning.  
We serve all the companies struggling with manual planning of their deliveries
- Our solution is a turnkey SAAS with a short learning curve suitable for small and big companies
- Are you losing your mornings planning your routes?  
Do you want to regain control of your fleet?
- WorkWave has helped more than 1000 companies automate their operations and keep control of their vehicles.
- Call us for a customized demo of the software in your business scenario.

## Demo or face to face Meeting agenda

Thank you for being today with me.

We set up this meeting to last one hour and I promise we will be finished by XXX

Here is what I like to do:

- I will spend 2/3 minutes about my company and how we solve issues for our customer and why they usually come to us
- Then I will explain why we are different than the others and successful at what we do
- I will ask some questions to better understand your situation
- Depending on your feedback I will share with you some information or case studies
- After that, we can discuss if this is a good fit and define with you the logical next steps
- This is what I want to do. Tell me if this is ok and what you want to walk away with after today meeting

## Objection handling and FAQs

### Calculation and optimization concerns

Q: How does your algorithm work?

A: Our algorithm is proprietary and relies on complex heuristics to find a good result in a reasonable time. It performs three steps in sequence, in order of priority:

1. The routes without any violation of the constraints
2. In the above set the ones that serve the most possible orders
3. In the above set the one that is less expensive, according to the cost parameters set for the vehicle

Having a look at [this deck](#) could help understand the huge complexity of what we do

Q: I have to deliver more customers in the same location, is this possible?

A: Route Manager will try to group orders in the same location if this is possible and does not imply violations ( for example for conflicting time windows)

Q: What happens if I have additional last-minute orders to be managed during my workday?

A: It is always possible to add new orders during the day and perform a new optimization. This can be done leaving the existing routes mainly untouched or allowing them to be modified. It is also possible to do a manual fit in of new orders.

### Traffic and driving time concerns

Q: Do you use real-time traffic information for planning?

A: Having real-time traffic information is not very useful when planning, because I am planning for the future, when traffic will be different from now. So real-time traffic is not useful for planning.

Q: Do you plan to take into account average traffic?

A: Yes, our maps give us a driving time that is based on average traffic for that road. This is an option and we activate it only when needed

Q: Is it important to consider real-time traffic information?

A: It is not very important because a good route planning will put the stops very close to each other, and if you look at our generated plans you will notice that driving time is usually very little. So even if traffic is high this has a little impact on the plan.

Q: Parking time alters my plans.

A: Parking time can be an issue, but you can include it in the service time, and every stop can have its specific parking time.

Q: If you have a region for which your driving times are very different from reality can you correct your planning?

A: Yes, we can define traffic areas where we force our underlying maps to provide a longer/shorter driving time inside the region. This bias can also be furtherly defined for specific time windows in the day.

Q: But if there are delays in the day due to traffic how can I correct my plan?

Using our mobile application, the driver can provide feedback on where he is and how (early/late) deliveries are going. No real-time traffic information will ever beat the exact knowledge of where your vehicles actually are.

Q: My vehicles report driving times that are always different form WWRM, how can I manage this?

A: WWRM can help you in several ways:

- It is possible to slow down/speed up your vehicles using a specific slider for each one of them
- When creating an account, we can profile your vehicle to be exactly as it is (*Height, Length, Width, Axle loading and number of axles, Cylinder capacity, Type of hazardous good, tunnel restrictions, type of emissions and filters, emission class*). We will route the vehicle per its specifications. Google only has a couple of vehicle types (bike and car) and could give you the driving times for a road that your vehicles cannot do.
- When modeling your vehicle WWRM could specify a maximum, minimum and average speed for every road category.

Q: I pay my drivers based on working time, I must check if they drove more because of traffic conditions.

A: WWRM 360 module gives you the capability of reporting on arrival and departure times to/from every destination. Drivers can declare when they arrived and left.

You can check if they are telling the truth because WWRM also automatically checks in/out using the smartphone GPS; you can also enable our WorkWave Mobile GPS module that will show you exactly the route taken by any vehicle with the corresponding timestamps.

It will be possible to compare planned routes with actual ones and have a detailed excel report for every stop.

Q: As an Operation Manager, I want to be able to completely redirect all vehicles and routes if, for example, exceptional traffic on a specific point is slowing down my operations

A: If there is one specific point that is causing huge delays or block of the traffic you can edit the maps introducing a [partial/total](#) block of one or more roads. If needed all the routes will be recalculated and re-sent to the drivers.

Q: Some regions have a lot of traffic, I want to send only some agile vehicles in those zones

A: Using Region tool you can define which regions are accessible by any vehicles implementing your specific policies. The system will automatically choose the best vehicles to serve orders in a specific area. For example, only bikes can be eligible to serve orders in the center of a town.

It is also possible to balance the number of vehicles accessing a specific region giving a cost to the access that the system will evaluate before sending a new vehicle in that area.

Q: I would like my driver to follow destination orders as was planned, but not exact roads as calculated, to avoid real-time traffic, how can I do it?

A: WWRM mobile application can be used to easily activate traffic-aware navigation tools on the smartphone (like Waze or Google directions) to be driven to next destinations with the shortest possible route in that moment.

A document describing how we handle traffic [can be found here](#).

## Geocoding concerns

Q: Does WorkWave import all my customers' address list?

A: WWRM only needs to import the addresses for the orders that have to be planned

Q: Does geocoding work everywhere?

A: No, In some countries, the Geocoding service is less reliable, usually due to ambiguity for the presence of many streets with the same name in close neighborhoods.

In these case, we suggest embedding a map into your customer-facing portal to let the end user specify the address using a map, then using latitude and longitude coordinates to specify destination location.

You can find [here](#) the instructions on how to embed this map into your portal.

Q: How can I be sure my imported destinations are correct?

A: The only way to be sure that your destinations are correctly imported is to provide LAT/LONG coordinates to WorkWave Route Manager.

Q: Do you perform additional operations on the geocoded address?

A: Yes, after geocoding the address we set the closest road as the destination for the vehicles. This is done to be sure we are sending the vehicle where it can actually arrive.

## Performance of the system

Q: How many vehicles can I route with WWRM?

A: Routed vehicles depend on the number of purchased licenses and cannot be more than 100 for every defined territory.

Q: How Many territories can I define?

A: There is no limit in the number of territories. Orders in the same territory cannot be more than 500 km far one from the other.

Q: How many orders can I manage?

A: When you perform an optimization, it cannot involve more than 1500 waypoints. They could be on the same day or spread over multiple days. If you need to manage more than this number



probably you want to subdivide your fleet into different territories and perform different optimizations.

There is no limit in the number of optimization you can do provided they are one after the other.

The maximum waypoint limit can be slightly tuned if necessary to accommodate specific needs that cannot be satisfied sub-dividing orders into territories.

Q: How many capacity parameters and tags can I have?

A: You can define up to 5 capacity parameters and 50 tags

Q: How many time windows can I have?

A: It is possible to define up to two time-windows per order.

Q: Is there a maximum duration for an optimization?

A: All optimizations stop at the latest after one hour providing you the best solution found up to that moment.

Q: How many regions can I define?

A: It is possible to define up to 100 regions.

Q: How many road editor blocks can I define?

A: It is possible to define up to 100 roadblocks.

Q: How Many custom fields can I have per every order?

A: It is possible to define up to 10 custom fields for every order. They can be different fields per order.

Q: Can I define different types of vehicle in my account?

A: Yes, WWRM allows the customer to customize his fleet to match the real road network that is applicable for the vehicles. It is possible to customize the size of the vehicle, number of axles, dangerous goods limits, and speed limits.

All vehicles in the same territory must have the same profile.

Vehicles in different territories can be profiled differently (for example it is possible to define two territories one to plan cars fleet, and the other to plan bikes fleet)

Q: How much time is WWRM 360 keeping my execution data?

A: Approved routes and Execution data are kept into the system for one year.

## SAAS related concerns

Q: Is WWRM compatible with GDPR laws

A: our service is compliant with European privacy law (GDPR) and you can see the details in chapter 4 of our [terms and conditions](#).

Q: Do I need a constant internet connection to operate WWRM?

A: TO use WWRM web application a constant connection is always required, the mobile app can work also without internet connection and will resync with the servers when the connection is restored.

Q: Is the speed of my internet connection impacting the quality of the service?

A: No, all the calculations are performed in the cloud and just the result is sent to the UI. A normal Internet link is enough

Q: is it possible to integrate the solution with my existing SAAS or on-premise CRM?

A: through the REST APIs it is possible to connect the system with any external software to perform many activities (uploading the orders, optimizing routes, downloading optimized routes). API documentation is available [here](#).

Q: Can I use any browser to access the web interface?



A: WWRM is only certified on an updated version of Chrome

Q: RM is SAAS, can I have a free trial?

A: Even if RM is a SAAS solution a free trial with no structured support would not get you up to speed. We can set up a customized demo with your real data to give you the exact feeling of how it is to use WWRM

## Competition Analysis and responses

### Roadnet (Omnitracs)

#### Route XL

Based on OpenStreetMap, so no customization for specific vehicles

RouteXL 20	RouteXL 100	RouteXL 200
Up to 20 stops per route *	Up to 100 stops per route	Up to 200 stops per route
Unlimited routes per day **	Unlimited routes per day **	Unlimited routes per day **
Free geocoding	Premium geocoding	Premium geocoding
FREE	€5 EUR per day or €35 EUR per month	€10 EUR per day or €70 EUR per month

### Route4ME

<p><b>\$149/mo</b></p> <p><b>Route Management</b></p> <ul style="list-style-type: none"> <li>✓ Run your business operation</li> <li>✓ Collaborate across your company</li> <li>✓ Connect to any app</li> <li>✓ Get real-time business insights</li> </ul>	<p><b>\$199/mo</b></p> <p><b>Route Optimization</b></p> <p>All included in Route Management Plus:</p> <ul style="list-style-type: none"> <li>✓ Automatically Optimize Single-Person Routes</li> </ul>	<p><b>\$299/mo</b></p> <p><b>Advanced Route Optimization</b></p> <p>All included in Route Optimization Plus:</p> <ul style="list-style-type: none"> <li>✓ Automatically Optimize Multi-Person Routes</li> <li>✓ Use Business Rules in route optimization</li> </ul>
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### Descartes



**Ortec**

**Bringg**

**Paragon**

**RouteMonkey**

**Geotask**

LocalPolish solution

**Bluesoft**

Thought for Service planning

## Why We Win and Lose

### Winning points

We are better than the other on the following points:

- Speed/quality of the algorithm: we can retrieve a good solution in seconds, other products provide a bad solution in seconds or a nice solution in hours.
- Constraints management: RM can take into account many constraints (load, time windows, tags)
- We can profile the vehicle: thanks to our maps we can profile vehicles in a very detailed way, thus planning with the actual route the vehicle will actually do

### Losing Points

We lose when the deal moves on the following subjects:

- Recurring orders: we have no other way to manage recurring orders than duplicating them
- Real-time planning: even if RM is able to re-plan this is not done as good as others
- Complex mobile app features. ( forms, barcode)
- When a customer facing portal is required
- When a booking portal is required
- When the customer does not have control of the fleet

## Collaterals

### [Sales Talking Points](#)

#### Industry Specific pages

- [Parcel/courier](#)
- [Prepped meals/food delivery](#)
- [White glove](#)
- [Compost](#)

#### Brochure/1 pagers

- [Route Manager 360](#)
- [Plan, route, track analyze](#)
- [Proof of Concept \(PoC\)](#)
- [Driver Behavior](#)

#### WorkWave Route Manager - case studies

- [Compost Crew](#) (RM)
- [Marleen Kookt](#) (RM)
- [Recker & Boerger](#) (RM)
- [Walker Environmental](#) (RM)
- [Milkman](#) (RM)