



Getting from RFP to “Yes” in 10 Easy Steps

The Definitive Guide to Achieve Rapid
Buy-In for a Shipper TMS



Getting Rapid Buy-In for a Shipper TMS is a Challenge

Anyone with knowledge of a business sales process understands that getting a buying commitment requires a lot of “yesses” from various stakeholders. The first “yes” often comes before sales makes contact by an organization agreeing that a problem or opportunity exists.

For shippers, one such agreement comes when identifying the need to implement or upgrade a transportation management system (TMS).

To find the right TMS, most shippers will conduct a formal request for proposal (RFP). This gives each TMS provider a chance to detail why they are best for the job, after which shippers can narrow the field and make a selection.

That leads to the next internal consensus: “Yes, we agree on the recommendation and want to move forward.”

Sometimes this is the hardest “yes” of all.

Achieving alignment on a TMS solution can be a major challenge. Stakeholders have competing priorities and resources. Some are less motivated or confident in moving forward. In fact, **only 39% of people** feel confident in building a meaningful business and financial case to justify a decision. This represents a huge problem considering that **80% of deals require sign-off** from a vice president or higher-level official, according to research by Corporate Visions.

Interested in making the most of your RFP to find the best TMS? Download our industry guide, *“**Successfully Navigate the Search for a New Shipper TMS**”*



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Moving from an RFP recommendation to a TMS implementation can be a long road. As with any journey, preparation is key. **Following these 10 steps** will ensure project leaders are prepared to overcome roadblocks that will come from others at the table, and help an organization arrive more quickly at “yes.”

1

Understand the Broader Business Objectives

Connect the recommended TMS's benefits to a company's strategic goals.

Earning executive buy-in for a TMS recommendation will require aligning the value of a new platform to the business's top objectives. Detailing a case for making performance improvements in specific departments is useful. However, senior leaders often are removed from pain points that lower-level staffers deal with daily. Tying the impact of those improvements to business goals will make a compelling case for c-suite decision-makers.



Action items: Review the company's strategic plan, listen to an investor call, or find the performance goals your company is measuring itself against. Next, write an RFP executive summary that demonstrates how the recommended TMS solution contributes to achieving those top metrics. That way, executives can more clearly see and understand how the business benefits as a whole.

2

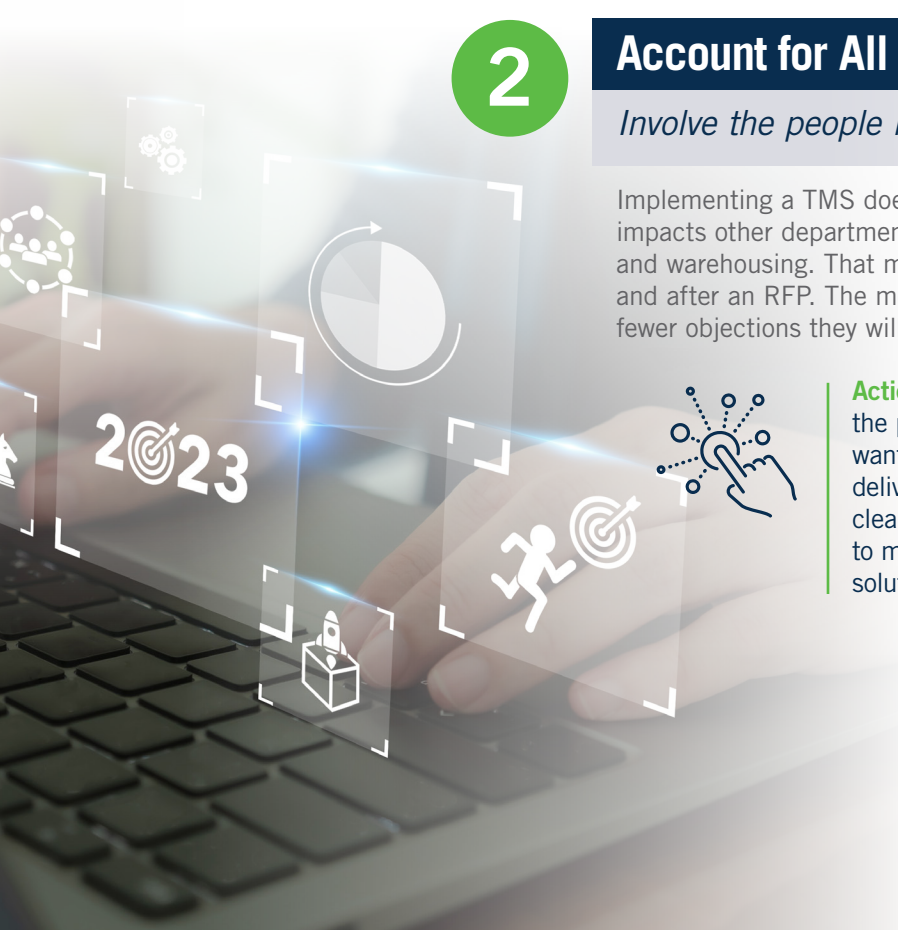
Account for All Stakeholder Needs

Involve the people influencing the decision in the process.

Implementing a TMS does not just affect transportation teams. A new system impacts other departments that include finance, accounting, MIS, procurement, and warehousing. That makes gathering their feedback critical before, during, and after an RFP. The more each team feels invested in selecting a TMS, the fewer objections they will have when making a final decision.



Action items: Use measurable data points to address how the proposed solution meets each department's needs, wants, and desires. It helps when a TMS provider can deliver these data points in an objective format and show clear results. When sitting down with group leaders prior to making the final decision, use the data to compare the solution to what they have provided as “must-haves.”



3

Consider External Factors

Speak to potential what-if scenarios beyond a company's control.

Writing, managing, and reviewing RFPs can take months, all while business conditions evolve daily. Inflationary pressures, the threat of an economic recession, new regulations, fuel prices, staff retention—every challenge holds the potential to influence a TMS decision. Accounting for external pressures as part of the TMS recommendation will confront these factors head on.



Action items: Address how the proposed TMS can negate unfavorable market and economic conditions. Recognize that new pressures may influence the timeline, prioritization, and resources available for implementing a TMS. Leverage data to confront the what-if's that are creating hesitation. Show how moving forward with a TMS solution can control for those possibilities.

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4

Get the IT Team On Board

Prepare for the unique objections of the technical team.

Even if the c-suite agrees to the price tag early on, getting a company's IT team on board with a new TMS often presents the bigger challenge. Those specializing in the technical aspects of projects think of proposals in terms of: **1) resources**, **2) security**, and **3) impact** on business functions. Proactively accounting for these concerns in a TMS recommendation expedites earning technical expert consent.



Action items: Highlight the resources that a TMS provider offers. This might include project management, implementation support staff, and training specialists. Include a projected timeline for implementation. IT teams want to know how long a project will tie up their resources.

Call out the TMS provider's security risk mitigation measures. According to Gartner, 88% of companies consider cybersecurity a direct threat to business operations. Cyberattacks caused by third-party exposures are on the rise and 45% of U.S. companies already have experienced a data breach.

Finally, address the impact on business functions. Detail interruptions or outages required for implementation.

5

Offer a Solution to Pain Points

Remind stakeholders why the company needs a new TMS.

Now is the time to revisit why you engaged in an RFP process to find a new TMS. The right TMS can significantly reduce expenses and cost overruns associated with routine challenges. Those include time-consuming manual entries, declining customer service scores, missed shipments, costly human errors, poor utilization, and outsourcing functions that could be done better and cheaper in house.



Action items: Use each pain point as a value add by highlighting how the TMS can solve issues for different functions throughout the company. For example, if the pain point is route planning and demand planning, show how the TMS can reduce freight costs by 18%. If your business wants to grow load volume without increasing headcount, detail the challenges of that scenario in the current state and how things improve with the help of a new TMS. The goal is to demonstrate the magnitude of today's obstacles and offer a path to eliminate them.

6

Add Measurability and Relevancy to the ROI

Show how the TMS solution benefits the business.

Departments often operate in silos and are unfamiliar with the struggles and workarounds of other teams. Pointing out certain limitations in the current environment will resonate well with those directly affected, but the ultimate goal is to establish an incentive for company-wide change. This will require making the opportunity to change resonate with as many stakeholders as possible.



Action items: Transform the unique pain points for your business into a powerful case for a return on investment. **Focus on three core areas:** cost savings, time savings, and revenue enhancements. Ask your selected TMS provider to assist by pulling and running actual data from your business live on their platform. Better yet, have them do it live on a conference call with team members to demonstrate the benefits of using a new process.

As an example, team members could see how a system will eliminate manual load entries to achieve a 15% increase in efficiency. You could also demonstrate how integrating the TMS with accounting software could eliminate outsourced invoice auditing costs. Leveraging the TMS to better utilize equipment could also offer 35% more load capacity. The objective is to translate how solving seemingly minor problems will benefit the company more broadly.



7

Focus on the Big Picture

Personalize the impact of value-add features.

No TMS is perfect, but each technology provider has developed specialties and areas of expertise to set themselves apart in a crowded market. The RFP process aims to find the best fit for your business's unique needs. The best-fit TMS provider for your business should also be a partner who takes a consultative approach to help your team reach a consensus and offer dedicated support during implementation and ongoing training.



Action items: Stakeholders have different opinions on what functions and features they want or prefer a TMS solution to have. Those opinions matter, but sometimes people focus on their own roles and lose sight of the big picture. Focusing on where a TMS will have the greatest overall impact to an organization will help people come onboard with a decision. As well, call out the value-add features and extras that a TMS solution offers, such as reporting, dashboards, training and other benefits that will directly impact the user experience for stakeholders.

8

Know the TMS Provider's Platform Roadmap

Share how the technology will evolve.

Companies that fail to continually invest in their product should never make it to the top of your recommendations list. Logistics constantly change and so should any viable TMS. Increasingly, advancements in TMS platforms that use artificial intelligence (AI) and machine learning (ML) enable users to automate routine tasks and solve complex problems. Understanding where the provider and its TMS are headed will ensure the offering aligns with your long-term needs and goals.



Action items: Document where the provider is investing its time and resources. Take inventory of new features on the horizon and the timeline for delivery. Find a TMS solution with AI and ML-powered automation that can be linked to direct time and cost savings. Also, discuss how the TMS provider processes and prioritizes user feedback as part of its platform roadmap.

A good roadmap reflects innovation, a deep understanding of customer needs, and an awareness of future forces impacting business performance.



9

Do Not Make It About the Software

Focus on solutions to needs and challenges

Concentrating solely on the bells and whistles of a new TMS is a common mistake when presenting a recommendation. Stakeholders care far less about what a piece of technology does versus what it does for them. Remember, people always want an answer to “What’s in it for me?”. Overcoming objections requires selling solutions, not software.



Action items: Connect the standout product features of a TMS to user impact. For example, you could highlight the short time to configure and setup the solution; a vendor’s round-the-clock support; or its extensive knowledge base and training opportunities for users.

Better yet, if a recommended TMS utilizes AI or ML capabilities it can simplify tasks for users and help them make better decisions. Other standout features can include automating carrier spot bids and streamlining carrier onboarding versus making tedious calls asking for price quotes on one-off loads. Emphasize why certain features matter rather than simply what they do.

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10

Detail the Stakes of Doing Nothing

Offer a narrative that creates a sense of urgency.

Change is hard. A natural objection is, “If it isn’t broken, don’t fix it.” Stakeholders may feel successful despite using a manual process or an outdated TMS. Therefore, implementing new technology can feel like a big risk. Those risks can be overcome with a vendor that can demonstrate real time and dollar savings, by running your data, and new revenue opportunities. Sharing real numbers with the CEO or CFO will create a sense of urgency throughout an organization to move forward and overcome inertia.



Action items: Develop a strong motivation for innovating by helping decision makers understand why every day, week, or month without the recommended TMS harms the business.

Answer these questions to create a compelling reason why now is the time to act:

- What happens to the business if we maintain the status quo?
- If the new TMS solved persistent pain points today, which important projects/priorities could we focus on?
- How does delaying the recommended TMS’s implementation affect revenue, profitability, service, and business growth?

Closing any big deal requires overcoming objections. Anticipating and accounting for them as part of the process increases the likelihood of success. Keep the goal in mind and continue driving forward.

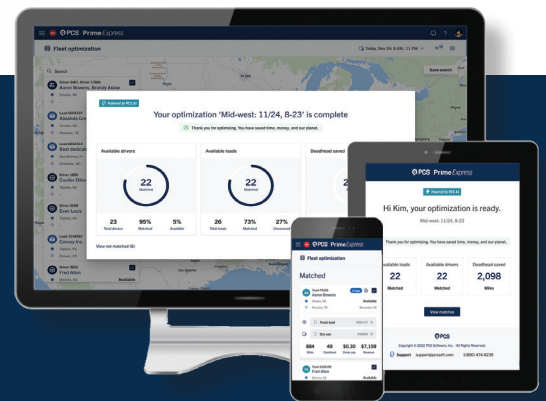
“Yes” to a new TMS is straight ahead.

This industry guide on overcoming common objections that stall TMS purchases is brought to you by PCS Software.

Why Companies Pick PCS

PSC Software is the AI transportation management platform for mid-to-large enterprise shippers in the United States and Canada. The cloud-based, API-integrated platform automates the entire transportation logistics operation.

Prime Express from PCS Software is a transportation management platform (TMP) with optimization technology for solving major challenges for shippers and carriers. The easy-to-use dashboards for making intelligent decisions and communicating with partners directly save time and simplify logistics.



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