

ANDREW AIDE - Customer Service



Age
25 to 34 years

Highest Level of Education
Associate degree (e.g. A

Social Networks



Industry
Agriculture

Organization Size
1-10 employees

Preferred Method of Communication

- Phone
- Email
- Text Messaging
- Face-To-face

Tools They Need to Do Their Job

- Content Management Systems
- CRM Software
- Cloud-Based Storage & File Sharing Applications
- Word Processing Programs
- Reporting Software
- Email

Job Responsibilities

Take customer service calls and provide report of issues, contact current customers regularly, provide training on new features

Their Job Is Measured By

Customer engagement and retention, problem solving skills, adaptability

Reports to

CEO

Goals or Objectives

Solve customer problems, control business costs, improve sales, gain customers, WOW customers

They Gain Information By

Industry conference and magazines, listening to customers

Biggest Challenges

- Navigating Client Relationships & Communications
- Communication
- Project Management & Disorganization
- Problem Solving & Decision Making
- Change Management
- Collaboration & Creativity

A Day in the Life

Field and answer application questions

Provide sales support

Manage and maintain online training material

Password reset

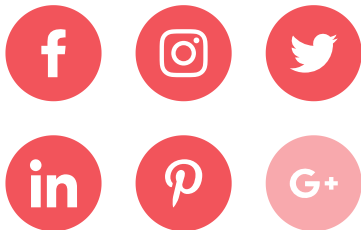
PENNY PINCHER - Accounting AP Clerk



Age
25 to 34 years

Highest Level of Education
Associate degree (e.g. A

Social Networks



Industry
Agriculture

Organization Size
11-50 employees

Preferred Method of Communication

- Phone
- Email

Tools They Need to Do Their Job

- Accounting and Bookkeeping Systems
- Word Processing Programs
- Email
- Invoicing Software
- Reporting Software

Job Responsibilities

Making sure the bills get paid, making sure invoices match orders

Their Job Is Measured By

Transaction Accuracy

Reports to

Director of Accounting / CFO

Goals or Objectives

Ensure the invoices match the order, pay invoices, reconcile differences

They Gain Information By

Enter text here

Biggest Challenges

- Navigating Client Relationships & Communications
- Communication

A Day in the Life

- Reconcile and process invoices
- Verification of Tax ID numbers and credit references for new clients
- Recording and verification of expenses
- Payment issue resolution
- These functions could be performed by Lauren Logistics - Logistics Administrator

RANDY RULE - Product Manager/Super Admin



Age
45 to 54 years

Highest Level of Education
Bachelor's degree (e.g. I

Social Networks



Industry
Agriculture

Organization Size
1-10 employees

Preferred Method of Communication

- Phone
- Email
- Face-To-face

Tools They Need to Do Their Job

- Word Processing Programs
- Project Management
- Email
- CRM Software
- Reporting Software

Job Responsibilities

Approve New carriers, approve new shippers, manage compliance, manage geofences for biosecurity, reporting of customer usage, metrics

Their Job Is Measured By

Revenue Generated, Carrier Compliance, Customer Usage, System Enhancement

Reports to

CEO

Goals or Objectives

Increase usage, Bring on new customers, Increase revenue

They Gain Information By

Enter text here

Biggest Challenges

- Navigating Client Relationships & Communications
- Communication
- Change Management
- Problem Solving & Decision Making
- Employee Morale
- Project Management & Disorganization

A Day in the Life

Moderate users

Verify and approve new carriers and shippers

Manage the release process

Manage biosecurity process

Demand vs. capacity reporting

Manage compliance process

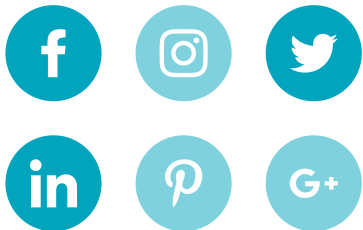
SKIP SHIPPER - Dispatcher



Age
35 to 44 years

Highest Level of Education
Some college, no degree

Social Networks



Industry
Agriculture

Organization Size
1-10 employees

Preferred Method of Communication

- Phone
- Email
- Text Messaging

Tools They Need to Do Their Job

- Employee Scheduling Software
- Invoicing Software
- Reporting Software
- Email
- Word Processing Programs

Job Responsibilities

Create carrier profiles, Receive notifications of new orders, bid on orders, receive shipper acceptance, upload compliance information

Their Job Is Measured By

Deliveries on time, on budget

Reports to

Owner - CEO

Goals or Objectives

Getting loads covered by carriers, bidding loads, assigning trucks/trailers, tracking shipment from start to finish, review order information, find loads to cover

They Gain Information By

Industry Conference and Magazines

Biggest Challenges

- Navigating Client Relationships & Communications
- Employee Morale
- Communication
- Problem Solving & Decision Making
- Change Management

A Day in the Life

- check email, voicemail, texts to make sure no issues with previous day deliveries
- enter current day's dispatch information
- take calls from customers
- adjust deliveries as necessary
- put information in for next day's deliveries/dispatch information
- communicate with drivers

BETTY BOOKKEEPER - Accounting AR Clerk



Age

25 to 34 years

Highest Level of Education
Associate degree (e.g. A

Social Networks



Industry
Agriculture

Organization Size
11-50 employees

Preferred Method of Communication

- Phone
- Email

Tools They Need to Do Their Job

- Accounting and Bookkeeping Systems
- Invoicing Software
- Email
- Word Processing Programs
- Reporting Software

Job Responsibilities

Invoicing shipper based on BOL, paying driver for delivery, ensuring invoices match

Their Job Is Measured By

Transaction Accuracy

Reports to

Director of Finance/ CFO

Goals or Objectives

Enter text here

They Gain Information By

Trade conference and magazines

Biggest Challenges

- Navigating Client Relationships & Communications
- Communication

A Day in the Life

Reconcile and process invoices and BOLs
Verification of tax ID numbers and credit references
Resolution of payment issues
Record and verify expenses

HANK HARMONY - Receiving Manager/Associate



Age
35 to 44 years

Highest Level of Education
Bachelor's degree (e.g. I

Social Networks



Industry
Agriculture

Preferred Method of Communication

- Phone
- Email
- Text Messaging
- Face-To-face

Tools They Need to Do Their Job

- Employee Scheduling Software
- Word Processing Programs
- Email
- Invoicing Software
- Reporting Software

Job Responsibilities

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Their Job Is Measured By

Shipments received in good condition, properly accounted for, and organized

Organization Size 1-10 employees

Reports to

Warehouse Director

They Gain Information By

Enter text here

Goals or Objectives

Enter text here

Biggest Challenges

- Employee Morale
- Communication
- Problem Solving & Decision Making
- Change Management
- Collaboration & Creativity
- Navigating Client Relationships & Communications

A Day in the Life

Coordinate and enforce operational policies and procedures
Ensure compliance with regulations
Oversee inventory control