



SUCCESS STORY TRANSPORTATION

HENIFF TRANSPORTATION DELIVERS PERSONALIZED OMNICHANNEL DIGITAL EXPERIENCE

Apexon helps transportation leader modernize and streamline information access with Salesforce-powered self-service experiences



Heniff Transportation Systems is a proven leader in liquid bulk transportation. As a full-service solution provider, they are focused on transporting customers' chemicals safely, securely, and on time.

With nearly 100 locations and 2000 drivers strategically placed across the U.S., Heniff provides innovative, full-service supply chain solutions including transportation, tank cleaning, rail transloading, and ISO import/export operations.

As customer and driver demand for more timely information regarding orders, invoices, and travel logs grew, Heniff was looking for a way to provide a one-stop, self-service experience that would streamline interactions and provide both sets of constituents with the data and service they needed, when they needed it. Apexon was engaged to help Heniff better define its solution vision and execute on it by leveraging its existing investments in Salesforce Experience Cloud and Tableau.



Leader in liquid bulk transportation



Nearly 100 locations and 2000 drivers across the us



Integrated freight network with full-service supply chain and logistics solutions

THE CUSTOMER JOURNEY

MARCH 2021

- Defined user experience roadmap for Heniff customers and driver

MAY 2021

- Launched custom-branded customer and driver experience portals
- Integrated systems, data and security (Azure AD, On Prem, Heniff.com)

MAY 2022

- Implemented SSO to simplify access to the Employee Experience Portal

THE RESULTS

KEY OUTCOMES



**EASY, INTUITIVE,
SELF-SERVICE ACCESS
TO KEY INFORMATION**



**CUSTOM-BRANDED
EXPERIENCES FOR CUSTOMERS,
DRIVERS, EMPLOYEES**



**REDUCED
INFORMATION &
SERVICE INQUIRIES**

OUR METHODOLOGY

THE DIGITAL LIFECYCLE

Apexon works with companies
across the digital lifecycle.



**GO DIGITAL
LAUNCH &
EXPERIMENT**



**BE DIGITAL
AUTOMATE &
ACCELERATE**



**EVOLVE DIGITAL
BE INTELLIGENT
& AUTONOMOUS**

**Enable digital adoption in
a quick, and agile manner**



**Build digital infrastructure
and foundation for
enterprises to scale**



**Leverage data engineering
to make strategic decisions
and get digital right**

Apexon provided a blueprint to
deploy Salesforce Experience sites
with embedded Tableau reporting for
customers, drivers, and employees.

Apexon deployed Salesforce
Experience Cloud with embedded
Tableau reporting where all
submissions and support cases
are automatically routed to the
appropriate Heniff teams.

Salesforce Experience Cloud
Platform provides all parties with
personalized real-time data access
to keep them up to date and help
enhance their decision making.

THE CHALLENGE

MORE TIMELY DATA & INFORMATION TO ENABLE CUSTOMER SELF-SERVICE

Heniff wanted to make this information more readily available online to both groups to better meet their needs and reduce the unnecessary burden on staff.

The company was already using Tableau reporting on a very limited basis and had decided to use Salesforce Experience Cloud to expose its existing Tableau dashboards, which contained a lot of the required information. But they did not have a clear path forward and knew they were only getting limited value out of their Tableau reporting capability.

Heniff's sales and services team found itself spending a lot of time taking inbound calls on the same types of topics:



From Customers

Account information, shipment status, invoices, service requests, and information requests



From Drivers

Scheduling, activity/metrics related to safety and compensation (i.e., mileage, hours, trips), company updates, and key contacts

The Heniff team knew they could do more to support the business and enhance the experience, so they turned to Apexon — to help explore what was possible, to define a plan, and to execute on it. Apexon was selected based on its proven expertise in Salesforce Experience Cloud and Tableau and its value-added ability to expand Heniff's thinking about how the online experience could be optimized for users.

THE SOLUTION

PERSONALIZED SELF-SERVICE INFORMATION ACCESS VIA SALESFORCE EXPERIENCE CLOUD

Salesforce Experience Cloud lets users create branded digital experiences to share information and collaborate with key constituents such as customers, partners, and employees. Businesses can create multiple sites for different purposes and transition seamlessly between them. Companies use Experience Cloud to connect employees with distributors, resellers, and suppliers, providing answers to common inquiries in one convenient place, and highlighting important news and information. By making key information and connections more accessible, the Experience sites also improve the overall experience users have with the business.

1

Apexon helped Heniff map out a path forward to take advantage of the capabilities in Salesforce Experience Cloud and Tableau to meet its goals and prioritize those capabilities that would deliver the highest business value. This involved defining the information needs of the different users and laying out a plan for how to address those needs.

2

Once that roadmap was clearly defined, Apexon designed and developed custom Salesforce Experience sites with Tableau reporting embedded into integrated with Tableau for both customers and drivers. Customers view a Heniff branded website, while drivers view either a Heniff or carrier-branded website.

3

The implementation included single sign-on access to all the information they need. This greatly streamlines the user experience. Users have instant access to customer embedded Tableau reports using the permission functionality in Salesforce Experience Cloud. There are no decisions or configurations to worry about. Users see the information they need, when they need it.

As a result of the success with the customer and driver experiences, Heniff has worked with Apexon to apply the same type of experience for employees – where they can access all HR policies, employee information, company news and more. Each group has different permissions based on roles, regions, and the different information they need access to.



CUSTOMER EXPERIENCE

- Custom Tableau reports and dashboards
- Account information
- eStat Invoices
- Shipment tracking
- Company news
- Heniff service overview, locations, key contacts
- Chatter messaging app for communications, rate requests, and case logging
- Customer support



DRIVER EXPERIENCE

- Driver onboarding and education
- Tableau reports and dashboards covering mileage, hours, other key compensation metrics
- Forms
- Resource document library
- Company news
- Locations and key contacts
- Chatter messaging app for communications and case logging
- Customer support



EMPLOYEE EXPERIENCE

- Customer Tableau reports and dashboards based on role and region
- HR policies
- Benefit information
- Company news
- Employee support

All submissions and support cases are automatically routed to the appropriate Heniff teams.

Key Outcomes

With the Salesforce Experience Sites in place:



Improved Customer Service

Sales reps receive an email with their customer's rate request or support case information upon submission; the appropriate Heniff team receives an email with the specific form or support case information



Custom Customer Experience

Customers can access all platforms, view information about Heniff, submit rate requests, contact their sales reps, and send Chatter messages all from the same site



Custom Driver Experience

Drivers can view reports and dashboards, access resource files, view information about Heniff, contact support, send Chatter messages, and submit photos, referrals, feedback and lease purchases



Improved Employee Experience

The Heniff team manages all data related to and submitted by customers and drivers in Salesforce

Apexon met Heniff where they were in their digital process – leveraging its expertise with Salesforce Experience Cloud and Tableau to help Heniff take full advantage of the comprehensive capabilities in each. Heniff had a vision – and Apexon expanded their thinking about what was possible and executed flawlessly on that vision.



Apexon is a pure-play digital engineering services firm focused on helping companies accelerate their digital initiatives from strategy and planning through execution. We leverage deep technical expertise, Agile methodologies and data-driven intelligence to modernize systems of engagement and simplify human/tech interaction.

We deliver custom solutions that meet customers' technology needs wherever they are in their digital lifecycle. Backed by Goldman Sachs and Everstone Capital, Apexon works with both large enterprises and emerging innovators – putting digital to work to enable new products and business models, engage with customers in new ways, and create sustainable competitive differentiation.



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