

75% Faster Customer Onboarding for a Logistics Platform

Case Study



BUSINESS CHALLENGES

One of our clients in the logistics and transportation sector—faced 2–3 hour delays in customer onboarding due to manual security checks by the sales team. The process was time-consuming, error-prone, and caused activation bottlenecks.

OUR SOLUTION

- Implemented an automated onboarding process within Salesforce.
- Integrated with external government APIs to fetch and validate client data.
- Used Apex and batch processing to automate security checks and reduce manual work.
- Built interactive UI components with Lightning Web Components (LWC) for a responsive user experience.
- Centralized all verification data within Salesforce, eliminating the need to switch systems.
- Resulted in a faster, error-free, and scalable onboarding process.

TECHNOLOGY USED

- Apex
- Lightning Web Components (LWC)
- Batch Processing
- External APIs (open-source APIs provided by the US government)
- Salesforce Platform

VALUE DELIVERED

- Manual verification of DOTs on the FMCSA portal was completely automated, removing the risk of errors and saving significant effort.
- FMCSA authority details for DOTs are now stored and referenced automatically in Salesforce, making access seamless for users.
- Any fraudulent or improper registrations are automatically flagged and reported to the security team, ensuring compliance and security.
- Overall, we helped the client **achieve a 75%** improvement in operational efficiency while dramatically enhancing onboarding speed and accuracy.
- The onboarding process was reduced from **2–3 hours** to just **5 minutes**, allowing new customers to get started quickly.