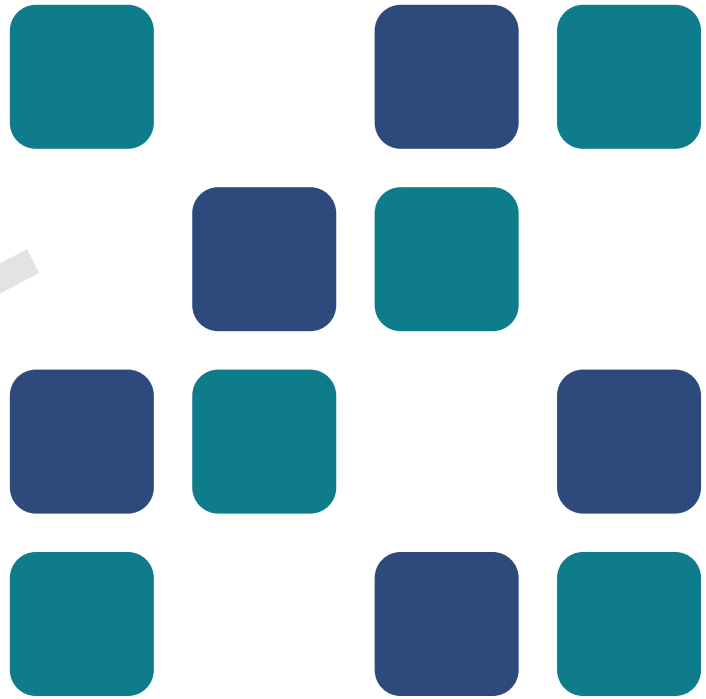
PROPOSAL - REF. CP-2027-014

Customer Portal Modernisation

A proposal prepared for Calder & Price Logistics



SAMPLE

Prepared by Northbeam Consulting - 12 March 2027 - Valid for 30 days

Executive summary

- Calder & Price handles 4,200 shipment enquiries a week by phone and email
- We propose a self-service portal for tracking, documents and claims
- Delivered in 16 weeks across four phases with a fixed fee
- Expected result: 45% fewer inbound calls and claims resolved in 3 days instead of 9

Our recommendation

Option B, Portal + Claims, at $186,000.

It pays back in about 11 months through reduced call-centre load.

Decision needed by 31 March to start in April.

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What we heard from your team

Findings from six discovery interviews, February 2027

1

Calls about status

Most calls ask "where is my shipment?" even though the data already exists in the TMS.

2

Paper-heavy claims

Damage claims travel by email attachments and take an average of 9 working days.

3

No single view

Account managers rebuild client reports by hand from three systems every month.

4

Security concerns

Clients share login details because the current extranet has no user roles.

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Objectives and success measures

- [ ] **Cut inbound status calls by 45%**
  Measured in the call-centre system, 90 days after launch

- [ ] **Role-based access for every client**
  Admins invite their own users; no shared passwords

- [ ] **Resolve claims in 3 working days**
  From submission to decision, tracked in the portal

- [ ] **Monthly reports generated automatically**
  Account managers spend zero hours compiling them

- [ ] **Self-service for 80% of clients**
  Active portal users among accounts with 10+ shipments a month

- [ ] **Accessible and mobile-friendly**
  WCAG 2.2 AA checks on all portal pages

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