

CASE STUDY

# When your data is in five places, your decisions are based on one of them.

Logistics companies move fast. Data that lives in separate systems, a TMS here, a CRM there, accounting software somewhere else, means your decisions are always based on a partial picture. SmartWay Transportation fixed that with Power BI.

## Does this describe your reporting?

- Executive reports are assembled by hand from multiple department exports
- The sales team tracks performance in spreadsheets alongside the CRM
- You can't see carrier performance and sales profitability in the same view
- Leadership receives periodic reports that are outdated before they act on them
- Identifying which customers or lanes are actually profitable requires manual analysis
- No one trusts the numbers because everyone built them differently

## What Armely built for SmartWay

SmartWay Transportation is a non-asset-based logistics provider in Kansas City, managing full and partial truckloads across a national carrier network. Their data was scattered across their TMS, CRM, and accounting software with no unified view.

Armely connected all three systems to a centralized data warehouse and built three Power BI dashboards: a Load Factoring Dashboard for freight operations, a Sales Performance Dashboard for the sales team, and an Executive Dashboard for leadership with real-time financial and operational KPIs.

Before	After
Data scattered across TMS, CRM, and accounting with no unified view	All three sources connected to a centralized data warehouse via Power BI
Manual reporting: hours spent assembling periodic reports	Live dashboards: real-time view available to all stakeholders
No visibility into carrier performance vs. cost	Load Factoring Dashboard: revenue per load, cost per load, carrier metrics
Sales team tracked performance in separate spreadsheets	Sales Performance Dashboard: revenue, win/loss rates, customer engagement
Executive team received fragmented, delayed reports	Executive Dashboard: real-time financial and operational KPIs in one view
No path to scenario planning or trend forecasting	Data models built for trend analysis, scenario planning, and forecasting

### Book a free Power BI environment review

We look at your data sources and show you what a unified reporting layer would look like for your business. [armely.com](http://armely.com) | [info@armely.com](mailto:info@armely.com) | 972-460-0643