

IT & ARCHITECTURAL FAQs

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The logistics industry is undergoing a massive transformation. Now, more than ever, Information Technology professionals are heralds of change, making critical decisions and system upgrades in response to commercial operators who demand a more agile, reliable and robust systems and IT infrastructure.

This white paper provides Information Technology professionals in the logistics and transportation industry with a clear and concise description of Winmore, the world's first bid and tender management software for the logistics industry. The question-and-answer format covers Winmore's security, integration and analytics protocols as well as the merits of a cloud-based software-as-a-service solution and software solutions that are optimized for specific vertical industries.

Winmore is an enterprise-grade, cloudbased bid and tender management software application designed exclusively for logistics service providers, particularly freight forwarders and freight brokers. Winmore leverages a multi-tenant architecture to deliver the software, hosted in the cloud and accessed via a web browser, to logistics service providers.

Features are implemented in a single, common codebase, which means Winmore focuses its efforts on application enhancements, not on timeconsuming and resource-draining, oneoff modification implementations for each customer. In addition to the cost savings, Winmore takes responsibility for all updates/upgrades to the codebase in the cloud, eliminating the need for IT-led updates/upgrades on the customers' servers. As a result, all customers are always using the latest available version on the latest available infrastructure.

INTRODUCTION



WHAT IS WINMORE?



Winmore takes IT and data security very seriously. Some of the largest logistics service providers in the world have rigorously tested the software and found the security protocols meet their stringent information security policies and have standardized Winmore for mission-critical business processes.

Winmore guarantees the separation of each tenant's sensitive data through schema and security protocols, ensuring that there is no data mingling between customers. The data segregation policies and strategy were vetted and approved by Winmore investor Salesforce.com, who insist on only the strongest methods for securing access to information.

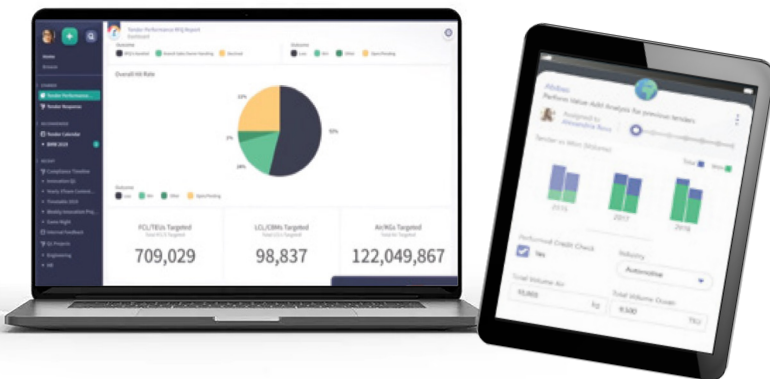
In addition, the Information Security departments of the largest German and Swiss multinational corporations in the logistics industry evaluated Winmore's data segregation policies and subsequently deployed the software to thousands of their employees around the world.

In terms of flexibility, Winmore provides extensions and APIs designed to communicate and integrate with other software, allowing our customers to meet the most custom of requirements. For data integration, Winmore provides flat-file import/export and a REST-based API for bi-directional data sharing and interoperability. For extending analytics, the Datamart option integrates with the most commonly used industry software and BI tools to enable analysis of data not just within Winmore, but also those imported from other applications.

Winmore's infrastructure was designed for scale, and includes load-balanced networks, pools of application servers, and clustered databases, allowing the software to be highly available and faulttolerant.



Because logistics is a mobile business, Winmore is accessible anywhere in the world using any browser-based device, including desktops, laptops, Apple/Android smartphones, and tablets. Winmore customers often cite the fingertip-sized buttons and its consistent, intuitive layout as factors that increase adoption and drive engagements of the mobile software.



**Winmore is
designed for the
logistics industry.**

Why is this important?

There are two types of business software: horizontal market and vertical market.

Horizontal market software is an industryagnostic solution. For example, Microsoft Excel and Word are programs used by thousands of companies across hundreds of industries.

Vertical market software is developed and customized to serve the needs of companies within a specific industry or market. Winmore's bid and tender management software falls under this category because it is developed with logistics service providers in mind; it focuses specifically on sharpening and streamlining the bid and tender process to benefit its users.



By providing historical analysis and a collaboration platform between users and departments, Winmore enables customers to better identify which RFP and tender opportunities to pursue and which to decline, optimizing the bid process to qualify and win more of the right bids.

With the cost to prepare a transportation tender exceeding \$40,000, this capability alone saves customers thousands of dollars annually, allowing them to pursue better qualified and more profitable opportunities.

It is not unusual for Winmore customers to see a significant increase in the quantity of bids they can qualify, process and pursue, often upwards of 70%. Many have reported a double-digit jump in win rates.

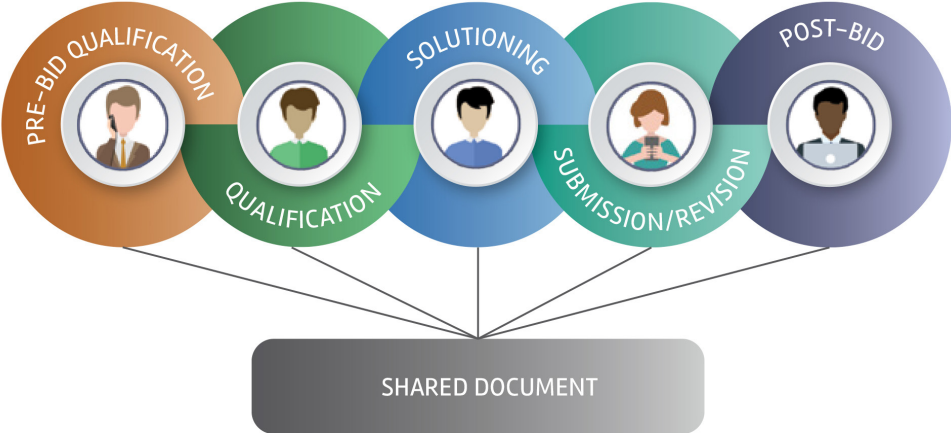
Can you describe the Winmore product architecture?

At the core of Winmore is an out-of-the-box workflow for road freight RFPs and ocean/air freight tenders, representing operational best practices designed exclusively for the transportation industry to increase bid throughput and boost win rates.

The workflow consists of stages: Pre-Bid Qualification, Qualification, Solutioning, Submission & Revision, and Post-Bid. Within each stage, pre-configured tasks are assigned to each employee (pricing analysts, sales reps, contracts administrator, product managers, etc.). Unlike checkbox tasks, which are commonly found in CRM software, Winmore tasks render data, provide insight, including reference material to help collaborators make informed decisions and complete tasks that have a meaningful impact on the process. Also, Winmore tasks can be augmented by training videos that explain why the task is important, who to go to for help, and how it impacts the goals of the business.



Despite the best attempts to standardize the format of a shipper's RFPs and tenders, most freight brokers and forwarders wrestle with a wide variety of submission documents. As a result, in most cases, Winmore customers prepare digital response documents in a hosted instance of Microsoft Excel or Word which, in turn, is embedded in Winmore. This ensures that everyone is inputting data at the right time in the process, into the right version of the shared document.



Because team members often participate in numerous bids with countless tasks, Winmore includes a digital personal productivity center called Winmore Home. Here, team members can review a list of open tasks, action items, chat conversations, scheduled activities, and so forth.

It is important to note that Winmore workflows are configured using the Winmore Studio, a point-and-click configuration service which is available to system administrators to make modifications and adjustments to the out-of-the-box workflows. For instance, the system administrator can change the terminology of the tasks to reflect the nuances of their logistics business.



VISIBILITY

Above the workflow, a layer of visibility capabilities ensure that the process is operating smoothly. For example, dashboards provide a color-coded depiction of the entire workflow, with each RFP and tender represented as a card within a column indicating the appropriate stage of the process. Incorporating many principles of the Kanban-style of continuous improvement, this visual depiction allows commercial leaders to observe RFPs and tenders that may be either at risk of missing their deadlines or stalled and requiring immediate action.

Winmore also features an intuitive querying tool called Insights, which allows users to develop and execute searches across the application. Unlike many tools that require users to execute a query and then tab to another section of the app for the results, Winmore Insights refreshes in real-time within the same browser tab, changing data on-the-fly as the search is refined. This accelerates the rate at which information can be found and shared across the team.

Winmore has an integrated Bid Calendar, which stores and updates due dates of RFPs and tenders based on scheduled tenders as well as the due dates of prior years. The visual heat map allows pricing and commercial teams to identify dates where several tenders are due on or around the same deadline, allowing them to manage workloads more efficiently and avoid crunch times which often compromise quality.

Winmore also includes an intuitive Search capability which rivals Google in its simplicity. By clicking on the magnifying glass icon in the upper left corner and typing in the first few letters of a shipper's name, a contact or a



bid, Winmore displays the records with those attributes. For example, typing in “Nik” will render company details for Nike, contacts who work for Nike, and the history of bids submitted to Nike.

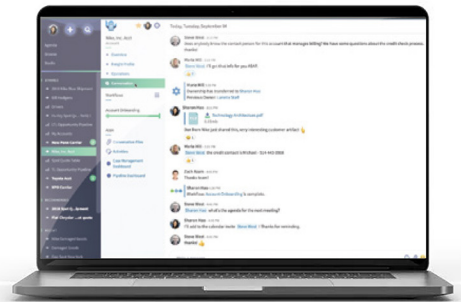
ACCOUNTABILITY

Winmore believes that teams work more efficiently when they are accountable to one another, so the software ships with a suite of collaboration and communication services that provide transparency and accountability across the commercial teams.

First, Winmore recognizes that RFPs and tenders are more successful when they include and account for the informal, collaborative and qualitative input that comes from teams working together. Quite simply, the most efficient and welldefined process is no substitute for the ad hoc comments from an account manager who got off the phone with the warehouse manager.

Winmore includes Conversations to capture and promote this type of collaboration. Conversations are secure chat service embedded in a digital workspace so team members can add comments to individuals or entire teams. When an employee is cited in a Conversation (also called “at mentioned”), he or she receives an email notification with a link to the workspace. Similarly, when a bid progresses from one stage to the next, the change in status is posted as a comment in Conversations.

Because logistics is inherently mobile, Winmore's native iPhone and Android software includes Conversations, allowing customer-facing teams to stay informed and collaborate with remote offices through the Winmore



software. This allows sales reps to use their mobile phones to snap photos of freight and upload it to Winmore, along with comments and description, resulting in more efficient pricing.

Moreover, the Conversation stream – which is contextual to each bid, shipper, contact, etc. – serves as a goto destination for anyone who needs to quickly come up-to-speed on the history of a project. This provides an invaluable context to operators responsible for implementing the solutions which were priced through the bid desk and managed in Winmore.

Winmore also recognizes the importance of compliance, so its RFP and tender workflows feature approval tasks. This ensures that as commercial leaders approve discounts or concessions, for example, each approval is documented and the process can only progress once approval has been given. Additionally, rules-based notifications ensure that everyone stays informed.

Not all tasks can be anticipated and configured in a workflow. Often, a change in workflow status may trigger an extra step in order to accommodate a highprofile project, for example, or coursecorrect for an unexpected change in capacity. To support these ad hoc tasks, Winmore features Action Items, which allow users to create a 'Digital To-do' and assign it accordingly.



For example, when an RFP moves from the Qualification stage to the Solutioning stage, a commercial leader may ask the air cargo product manager to ensure that capacity is available at the time it is required. Here, he or she can click on a notepad icon next to the change in workflow and create the Action Item, which will then be assigned and appear in the air carrier product manager's Home personal productivity center.

SERVICE EXTENSIONS

The Winmore Cloud includes a suite of service extensions that integrate secure browser-based applications into the Winmore environment. By integrating third-party BI reports into Winmore, for example, pricing team members can access the same pricing reports used by Finance to ensure consistency and compliance.

Cloud-based CRM systems are often integrated into Winmore through service extensions. If a pricing manager needs to gather detailed account data while compiling the bid, he can click on a tab to access SalesCloud by Salesforce.com, which is rendered within Winmore as an iFrame. (See *section on Integrating Winmore.*)

On-premise software resides on user's servers in-house, usually in a data center or a server closet. Data storage costs are incurred for all data used and generated by the application. A large user will have significant ongoing hardware, backup, recovery, and security costs and responsibilities, as well as software licenses to purchase and maintain. An in-house software approach also requires a sizeable and costly support staff to maintain acceptable uptime levels.

Cloud-based or Software-as-a-Service (SaaS) applications, on the other hand, reside on the vendor's servers. A web browser or native iPhone or Android app is needed to access applications and data storage infrastructure. The user's tech support responsibilities extend no further than his or her PC or Macintosh computer. No more onerous hardware/software

How does a cloud-based application differ from onpremise software?



expenditures or the facilities and staff required to support a sizeable on-premise installation. All hardware and software application support are borne by the SaaS provider. As an example, Winmore uses Amazon Web Services (AWS) to achieve the high performance and uptime figures for its shippers.

Winmore assumes all backup and data recovery responsibilities. Customers are protected against ever more cunning hackers and intruders with a cloud setup maintained by Winmore and AWS. This infrastructure and the use of AWS mean Winmore can offer service level agreements (SLAs) that on-site clients would find hard to achieve on their own.

A managed cloud-based application environment, as opposed to an in-house one, relieves customers of the burdens of software updates and maintenance and allows them to devote their resources to their core business: finding profitable logistic services projects.

How does Winmore fit into our landscape of enterprise software like ERP?

Traditional business software application, such as SAP applications or an Oracle database, deal with “dead data.” It's very important for its intended purpose, which is reporting, but it's backward-facing — a snapshot of something that happened in the past.

Most companies, on the other hand, have enterprise software that support unstructured collaboration. These tools allow effective communication with colleagues in an instantaneous, ad hoc fashion. Email and IM are tools that logistics service providers use daily.

Winmore fits in between these two models and provides “structured



collaboration." It combines the structure of qualifying and responding to bids with the informal, contextual chat services that people have come to rely on every day.

Collaboration is the key to fast, wellinformed, and accurate RFP response and bid creation. Communication and data sharing between team members, spread throughout the organization, is essential to timely RFP response. And with our mobile-first approach, team members can access and contribute from anywhere in the world using desktops, laptops, tablets, and smartphones.

Winmore offers a one-way sync with an external calendar, including Microsoft Outlook. Additionally, when Winmore is configured for each logistics service provider, an email address, such as AcmeLSP@winmore.app, is created. When an email is sent to this address – usually through an opt-in bcc: by the writer – Winmore captures the email, scans for a match with an email address in the system. If it finds a match, it will add the email to the Conversation stream associated with the Contact and Account. If it doesn't find a match, it will create a task, suggesting the owner to create a Contact.

Does Winmore integrate with Microsoft Office?



Customers integrate Winmore with other software systems using a range of approaches, depending on their requirements. These include using flat file uploads, service extensions, the Winmore Datamart, REST APIs and third-party cloud-based integration services such as Mulesoft (recently acquired by Salesforce.com) and Jitterbit.

How can we integrate Winmore with our other software systems?



Winmore customers who are content with data refresh every 24 hours often integrate Winmore with other data sources through flat files. The approach is relatively simple, inexpensive and does not require much in the way of resources to maintain. With flat file integration, data is scheduled to export from a software-as-a-service application such as SalesCloud by Salesforce.com on a nightly basis.

Winmore then imports the updates. The most common use cases include updating contact and account information from CRM software into Winmore; and updating bid deadlines, next steps and task owners from Winmore into the CRM software.

Alternatively, some Winmore customers choose to embed pages from their CRM systems in Winmore using Winmore service extensions. As an example, a logistics company may choose to render the Account page from SalesCloud by Salesforce.com within Winmore by making it callable from within Winmore. Doing so displays the SalesCloud page within an iFrame in Winmore.

However, when customers want to integrate with external software, combine data from external sources such as a TMS or WMS, perform regression analysis or model projections, Winmore encourages the use of its Datamart. The Datamart offers a secure, partitioned instance of each customer's data which is optimized for rigorous analytics. (See next question "What is the Winmore Datamart?".)

Winmore also offers a REST API that does not require installing additional software to bring data back and forth between software systems. REST APIs are known for their flexibility since data is not tied to resources and integration



calls between software systems can return different data formats. Keep in mind that these integrations are often custom engagements, requiring the contracting of Winmore professional services consultants.

Finally, for Winmore customers who want to integrate and combine data from across their enterprise for near real-time data updates between Winmore, financial software and CRM, Winmore can leverage third-party enterprise integration platforms such as MuleSoft (which was recently acquired by Salesforce.com) and Jitterbit.

By using these enterprise integration platforms, data is constantly updated providing near real-time access across a common bus, which connects and updates fields in SaaS-based applications.

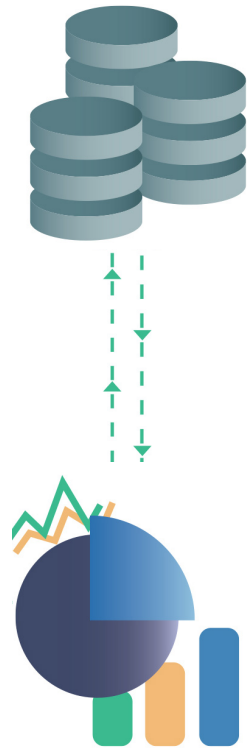


The Winmore Datamart is an extract of the customer's application data that is modeled for easy analysis and refreshed nightly with current data. The feature takes data out of the Winmore application and moves it to a secure individual database intended specifically for reporting and analysis. Customers can then connect their existing, off-the-shelf BI tools like Tableau, Qlik or Power BI to the Datamart to build reports and dashboards based on summarized Winmore data.

When TMS data is integrated into Winmore, it becomes part of the Datamart extract, allowing for deeper analysis of bid history. With integrated data, previous tender bids can be compared with awards, and then reconciled against actual freight shipments, increasing visibility to customer

What is the Winmore datamart?





accountability. The Datamart enables advanced analytics, historical assessments, and projections that increase any given bid's accuracy, timeliness, and profitability.

The Winmore Datamart delivers 10x better performance than other data warehouses. Winmore automates most of the common administrative tasks to manage, monitor, and scale the customer's data warehouse, which relieves them from the complexities of managing on-premises data warehouses.

The Winmore Datamart is built to scale with companies as their data grows with their business. They can quickly analyze critical data with no loading or ETL required, and easily resize their cluster with just a few clicks on the console or a simple API call.

For more information on the Winmore Datamart and integrating with TMS systems, please read the Four Steps to a Data-Driven Bid Desk white paper available at www.Winmore.app.

What security governance facilities are built into Winmore?

Winmore understands the importance of information security and has followed and monitored data intrusions happening weekly around the world. The logistics provider community is a prime target, as the NotPetya attack on Maersk proved in 2017.

Winmore's security is an inherent part of its architecture: users invoke a browser to access Winmore, which is hosted by AWS and leverages Kubernetes, an open-source container-orchestration system, originally



designed by Google and now maintained by the Cloud Native Computing Foundation. It automates deployment, scaling, and management of containerized applications, working with a range of container tools, including Docker.

As data flows from or toward Winmore – via a user's web browser, mobile device, or via an IT integration – it is securely transmitted with AES-256 TLS encryption to ensure that the data can only be read by the intended recipient system. Kubernetes provides a secure, always-up-to-date application layer immune to the common security “gotchas” of outdated OSs or misconfigured servers. All in-transit data using HTTPS are encrypted.

Once the Winmore application has processed an inbound request, it then securely transmits the request and its corresponding data payload using AES-256 TLS to Winmore's secure, continuously backed-up data storage environment on Amazon Web Services (AWS). This data is then stored using atrest encryption with AES-256, the keys for which are managed by Winmore, not Amazon. AWS is the Infrastructure-as-a-Service standard for thousands of corporations (e.g., BMW, Unilever, d Philips) as well as institutions (e.g., Esa, Europol, IATA).

Winmore and Amazon offer explicit support for the new policies and regulations by Regulation (EU) 2016/679, better known as GDPR.

Winmore took further steps to protect customers:

- In 2017, it engaged the NCC Group, the leading provider of cybersecurity consulting, to provide a security assessment of its web application and web services.
- Single sign-on solutions such as Microsoft Active Directory Federated



Services are supported. Winmore relies on its customer's identity provider for authentication and offers a native iOS and Android app available in iTunes and Google Play stores. It does not require a VPN connection.

- Winmore supports authenticating via ADFS, as well as other authentication providers via SAML 2.0.

How does IT enable Winmore for our users?

As the initial step of the implementation, Winmore requires a flat file with first name, last name, and email of employees who should be added as users of the Winmore application. If single sign-on is required, the customer's IT group will need to work with Winmore's resources.



Winmore requires the customer's IT department to whitelist a select number of URLs to allow for the application to properly function on their network. The list of URLs will be provided at the start of the customer implementation and can be found in Winmore's public knowledge base. Winmore will also provide the customer with a list of supported browsers.

Winmore requires the customer's IT department to work with all IT regions involved to help enforce the system requirements. The global IT customer contact must provide contacts for each regional IT department.

Winmore also requires the customer to identify the following resources in order to execute the implementation: project sponsor, project manager, technical lead, system administrator, trainers, level-1 support, and subject-matter experts. Each role requires a different time commitment, depending on the scope of work. Technical leads will be expected to support any required efforts around single sign-on, IP whitelisting, ongoing data

migration or integrations. If Datamart is included in the scope, the technical lead is responsible for connecting the customer's BI tool to the Datamart. The technical lead can expect to expend 10% of bandwidth during the enablement and during the initial period following post-engagement, unless the enablement requires integrations.

John Golob is the Chief Marketing Officer of Winmore, the leading provider of bid and tender management software for the global logistics industry. He works closely with executives at many of the world's largest logistics and transportation companies, including DHL, Kuehne + Nagel and CH Robinson. John started his career in logistics, working in film distribution for the Walt Disney Company before graduating from Harvard Business School in 2000.

ABOUT THE AUTHOR





About Winmore

Customer Success Platform for Logistics Companies

Winmore's Customer Success Platform helps commercial teams win more RFPs, accelerate time-to-value and build customer relationships at scale.

Bid and Tender Collaboration

for commercial, pricing, contracts and product teams to qualify and respond to RFPs and tenders, boosting win rates.

Customer Solution On-Boarding

for managing complex on-boarding customer implementations, accelerating time-to-value, reducing the risk of scope creep and improving operating margin.

Business Process Design Studio

A drag-and-drop business process modeling tool for developing multi-stage, collaborative workflows to bring your custom processes to life.

Winmore powers the customer success initiatives at some of the world's most respected logistics service providers, including carriers such as Averitt Express, brokers like CH Robinson, forwarders including Kuehne + Nagel and contract logistics providers such as LF Logistics.

Winmore was recently recognized by FreightWaves as a FreightTech 100, an award reserved for the most innovative software companies in the world.

Learn more at info@winmore.app

