



# 2021

## BUYER'S GUIDE

Route Planning Software



Route Manager  
by WORKWAVE

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# How Route Planning Software **BENEFITS YOUR BUSINESS**

**Whether you're focusing on making more sales, increasing your productivity, or providing better customer service, route planning software** can be a quick and easy way to help you meet your goals. To find the right solution, you'll need to review your current processes, identify any gaps, and define your business' goals.

**This buyer's guide** will help you understand the power and importance of a route planning software, how it can help your business succeed, and define what an optimal tool looks like for you. It will also help you prepare for vendor calls with quick tips, best practices, and checklists.



**Having the right software for your business makes all the difference**

“By understanding customers' needs early on, we are able to offer a better service:  
***increase conversion rates, exceed customer expectations, and ensure on-time arrivals.***  
**IT'S MADE POSSIBLE WITH WORKWAVE ROUTE MANAGER.**”

- Antonio Perini, CEO-founder of Milkman

# What is ROUTE PLANNING SOFTWARE?

Route planning software (aka routing software, route automation, or route optimization) simplifies the complexities of scheduling orders for businesses. It is an automated process that uses maps and math to balance customer requests and business constraints, such as:

## TIME-WINDOW ASSIGNMENTS

so that you can set and meet customer expectations with on-time arrivals

## TIME CAPACITIES FOR DRIVERS

so that your drivers will never work beyond the defined working hours (ie: set Driver 1 to work 7AM-3PM and Driver 2 to work 9AM-5PM)

## SPECIAL REQUESTS

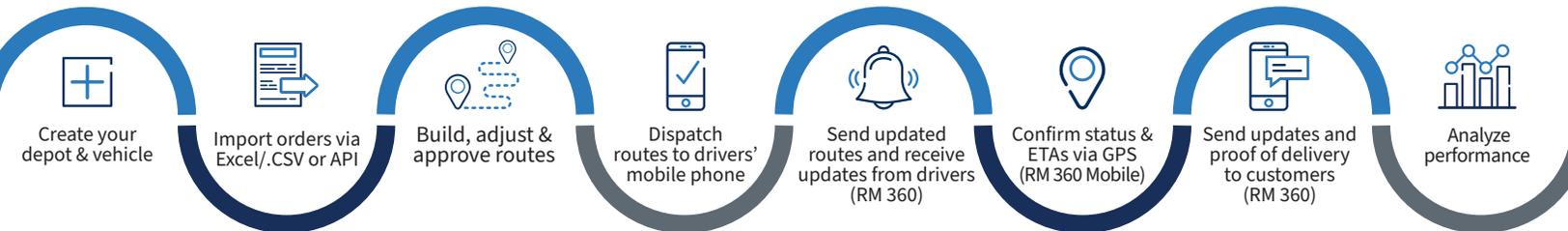
automatically plan for needs like “driver must have government clearance,” “vehicle with gate lift,” or “customer needs it delivered by next Thursday”

## LOAD CAPACITIES FOR VEHICLES

so that you never exceed weight/size limitations for your vehicles (ie: van 1 can hold 100 pallets)

Route planning software easily walks the user from data input to project execution seamlessly, while also integrating with real-time information updates from mobile alerts if applicable.

**Here is an example of our WorkWave Route Manager software workflow.**



## Common **FEATURES**

Route planning software provides powerful functionality, which can include live GPS tracking, proof of delivery, reporting and analytics, API integration, a driver mobile app, real-time planning, and advanced settings.

### **ANALYTICS DASHBOARD**

Get a quick snapshot into your team's performance metrics to see where you are succeeding and where you might be underperforming.

### **BEST FIT ORDERS**

Squeeze unserved orders into your plan without removing or rescheduling planned routes with the click of a button.

### **CALENDAR EXCEPTIONS**

Mark dates that your team is not available so that you do not plan unavailable resources, like approved vacation days or vehicle maintenance.

### **CALENDAR VIEW**

Quickly choose the date range you want to plan for (single or multiple dates) or review previous dates.

### **COST SETTINGS**

Costs can be the real challenges you face in your business. General costs, like customer satisfaction, must be considered when building routes.

### **CUSTOMER UPDATES**

Provide customers with SMS and email updates and a Live Tracking Link. Instantly provide proof of delivery when an order is completed.

### **DRAG & DROP**

Ability to move optimized orders between vehicles or days, regardless of what a software has planned, keeping you in control.

### **DRIVER'S MOBILE APP**

Keep your drivers in the know with real-time updates, empowering them with the tools and information they need while on the job.

### **DRIVER SETTINGS**

Set working availability, starting and ending locations, and break times to plan around your driver's available hours, needs, and preferences.

### **DYNAMIC PLANNING**

Plan last minute orders on the fly or re-plan your day if you need to adjust planned routes to accommodate last-minute changes or unexpected issues.

### **GPS TRACKING**

Obtain total transparency into field operations, including where your drivers and vehicles were at any given time.

### **LASSO**

Drawing tool used for selecting multiple orders on the map.

## LIVE ETAS

Receive real-time GPS information from your drivers to update the estimated time of arrival for the next orders on the route.

## NAVIGATION

Keep your drivers on schedule and allow them to click any order and then use the navigation app of their choice (like Waze, Google Maps, etc.)

## PLANNED VS. ACTUAL

Check in on how the plan was executed and monitor performance to help improve your operational efficiency next time.

## PROOF OF DELIVERY

Record photos, signatures, notes, or voice notes that your driver collects from an order.

## RECORD DRIVER ARRIVAL / DEPARTURE TIMES

Receive timestamps when drivers arrived and/or left locations.

## REGIONS

Limit vehicle entry and exits or pre-determine what vehicles are eligible to enter defined geographic areas.

## ROAD EDITOR

Block or “disfavor” specific roads when planning your routes.

## ROUTE SIMULATION PLANNING

Test your routes, plan expansions, or see how changes can affect your business in a safe environment before you dispatch your drivers.

## SWAP

Ability to quickly switch routes between vehicles.

## TAGS

A skill, piece of equipment, or other special aspect that makes a vehicle or group of vehicles the only qualified resources to serve an order.

## TIME WINDOW PLANNING

Build your routes based around the earliest and latest times your driver can arrive at an order - and to make sure you are meeting customer expectations.

## TRAFFIC PROFILES

Define areas that could impact your routes so that you “slow down” and provide accurate arrival times.

## VEHICLE PROFILES

Set up users based on specific type and mode of transportation (ie: walking, bike, heavy truck, van, etc.)

## VEHICLE SETTINGS

Account for maximum mileage, special tags, speed, and fixed costs (this info will be used behind the scenes to build smarter, cost-effective routes.)

## VIEW ONLY MODE

A setting that allows users to check on routes without having the ability to make changes.

# How Does Cloud-Based Route Planning Software **COMPARE TO MANUAL PROCESSES?**

It's not a competition of human vs. computer. The best-in-class routing solutions are powered by smart routing algorithms that can compute millions of delivery scenarios in a short amount of time and quickly provide the optimal solution.

Route planning tools should be considered decision support tools that help you maximize your operational efficiency. When you receive the plan, you can choose to dispatch "as is" or make adjustments. The output is a starting point, but you might need to add in your real-world knowledge like: moving a high priority order to your best driver, adjusting the traffic due to an event or parade, and blocking off certain roads due to construction.

## ○ **WHEN CAN A ROUTE PLANNING SOFTWARE HELP YOU DO THE HEAVY LIFTING?**

- ① You don't have hours to dedicate to route planning
- ② You want an easy way to increase efficiency and productivity
- ③ Customers want same-day or next-day deliveries
- ④ You're expanding and anticipate major growth
- ⑤ Paperwork has become overwhelming
- ⑥ You want to review performance (compare plan vs. actual)
- ⑦ You need a central location for planning; no more maps or sticky notes

## ○ **HOW DO ROUTING ALGORITHMS WORK?**

They are built on a brute-force or heuristics approach. A brute-force approach will analyze all of the possible combinations of sequences and assignments. A route with 85 stops (or nodes) has an unimaginable number of solutions (if there aren't peculiar constraints). This is impractical and the result is not worth the time to compute; it could take years! The heuristics approach is based on local map data and set constraints, and runs sophisticated mathematical algorithms behind the scenes. This will quickly build efficient routes that comply with your constraints, all within a few minutes.

# STEP 1

## Review Your **CURRENT PROCESSES**

First, meet with your team and review your current route planning process. Look for any gaps or inefficiencies and dig into your team's pain points. Scoping out the project early will help you stay organized, make better use of your time, and help you make a decision that everyone is on board with!

**Are you a business owner route planning on your own?**  
**You'll be interested in making sure that software:**

- Is easy to get started with from Day 1
- Integrates into your current workflow
- Provides onboarding & ongoing support



1

What's working? What's not?

2

How much time is spent route planning each day?

3

How do your drivers receive their schedules?

4

How do you manage customer service issues related to delivery?

5

Can you plan around specific delivery or order requests?

6

How do you measure or report on your routes?

7

How do you communicate with drivers before, during, and after delivery?

8

How do you confirm driver status?

9

How do you reschedule orders?

### STEP 2

## Define Your BUSINESS GOALS

Now that you have outlined your current processes, you'll want to discuss why you are looking for an easier, smarter way to route plan. Sure, every business is looking to improve processes and streamline operations, but identify requirements from the different departments that could be impacted by your decision. For instance, will your back office have support as they learn the new software? How easy is it for drivers to use the mobile tools when on the job? How will this software enable you to make your operational processes more efficient?

### TIP:

Take note of how you feel during your evaluation. Use this time to get a feel for the company culture and how your needs are being met. Be on the lookout for prompt responses, detailed answers with examples, and someone who understands your businesses challenges.

1

What are you looking to achieve?

2

What are your top three requirements?

3

Do you have the dedicated time and resources needed to implement a new solution?

4

Do you want to keep your drivers organized with a mobile app, or use print-outs to share schedules?

5

Do you plan on integrating route planning with your current business system? What system do you use?

6

What requirements, if any, does your IT team have?

7

How much time are you willing to dedicate to implementing new software?

8

How many team members will need to be trained?

9

What is your budget?

## STEP 3

# Evaluate and Compare THE COMPETITION

Make sure you ask the following questions when speaking with software vendors and run through the post-call checklist to keep your notes organized. These answers will help you narrow down your search and identify the top vendors.

FEATURES AND BENEFITS	VENDOR 1	VENDOR 2	VENDOR 3
Is the solution cloud-based or on premise?			
How do I input my data?			
Can the system take into account different modes of transportation (ie: heavy truck, motorcycle, bike, etc.)?			
Does it take into account time windows?			
How does it plan around traffic?			
How many orders can you plan at once?			
Do you offer GPS tracking? Is it through your company or a third party integration? (Note: if through a third party integration, you may need to sign additional contracts and manage the setup and integration - which can become time-consuming.)			
Can your solution use GPS location to plan in real-time?			
How can I dispatch routes to my drivers?			
Do you have a native mobile app or web-based?			
Can I use this solution outside of the U.S.?			
Can I access reports or performance metrics?			
What are my expected savings? Can you run one of my routes and share my expected results?			

# Steps in Choosing the Right Vendor

TECHNOLOGY	VENDOR 1	VENDOR 2	VENDOR 3
Who is your map provider? How often are the maps updated?			
How often do you release new updates? Do I need to pay to use the updated version?			
Will I have access to your APIs? Does a standard subscription include the APIs?			
Can you integrate with my customer database easily? How much time would my team need to invest?			

COMPANY	VENDOR 1	VENDOR 2	VENDOR 3
Can you provide a customer reference?			
How long have you been in business?			
How many employees do you have?			
What is your NPS?			
What separates you from your competition?			
Can you run one of my routes and share the output?			
What is your security policy?			
What is your current uptime?			

SUPPORT & PRICING	VENDOR 1	VENDOR 2	VENDOR 3
Is onboarding and/or support included?			
How long will it take to get started?			
Is support outsourced or in-house?			
How can I contact support?			
Will I be charged any maintenance fees?			
What is the pricing model? What is the contract length?			

### STEP 4

# Make the RIGHT DECISION

After you complete your demos, review the final results and make a decision as a team. Route planning is an important part of your operational efficiency and can affect several teams. With the right solution in place, you'll start to maximize your profits, improve the quality of customer service, and see improvements in efficiency across the board.

1

Does this solution meet your top three requirements?

2

Can this solution grow with your business?

3

Are you satisfied with the support and service level?

4

Is the solution user-friendly?  
Will it be easy to learn?

5

Did you contact each customer reference?

6

Is this solution built for someone in your industry?

7

What are your industry peers using?

8

Have you read online reviews?

9

Does this solution generate acceptable results?

By automating route planning, you will plan the most efficient route in minutes, reduce human error, and increase your team's productivity. When you can rely on a cloud-based decision-support tool, you're able to focus your time on meeting and exceeding customer requests while simultaneously increasing revenue and minimizing your overhead costs to increase profits.

**You'll be able to make smarter, data-driven decisions while adding crucial control and vital visibility into your day.**

## **In the end,**

the right route management software solution will **EMPOWER** you to accomplish the business objectives of today and tomorrow.

**PROMOTE GROWTH**

**FOCUS ON CUSTOMER SERVICE**

**MAKE DATA DRIVEN DECISIONS**

**IMPROVE OPERATIONAL EFFECTIVENESS**

**INCREASE PROFITS**

**GAIN AND KEEP CUSTOMER TRUST**

**EASILY COMMUNICATE WITH DRIVERS**

**REDUCE EXPENSES**

**BE PROACTIVE**

**KEEP UP WITH COMPETITION**

**MAINTAIN CONTROL**

**CONFIRM PROOF OF DELIVERY**

**IMPROVE ACCOUNTABILITY & PRODUCTIVITY**

**MANAGE YOUR DAY IN REAL-TIME**

**OBTAIN VISIBILITY IN THE FIELD**

**ACCOMMODATE DIFFERENT VEHICLE TYPES**

Looking for some

# ADDITIONAL INSIGHT?

See how food delivery company Good Eggs was able to scale up to meet increasing demand with WorkWave Route Manager as its routing and scheduling optimization solution.

[CLICK HERE >>](#)

About

## WORKWAVE

For nearly 40 years, WorkWave has been building best practices into its market-leading field service and last mile software solutions to allow best-in-class companies to grow their business, service their customers, and maximize their money. Its solutions empower service-oriented companies to reach their full potential through scalable, cloud-based software solutions that support every stage of a business life cycle, including marketing, sales, service delivery, customer interaction, and financial transactions. WorkWave is a trusted partner for thousands of customers across a wide variety of industries, including pest control, lawn care, cleaning, HVAC, plumbing and electrical, and last mile delivery. WorkWave's award-winning culture and solutions have been recognized in the SaaS Awards, the Cloud Awards, the American Business Awards, the NJBIZ Best Places to Work Awards, and the Stevie Awards for Great Employers.

**For more information, visit [workwave.com](http://workwave.com).**