

Custom CRM for the Logistics Unit

Customer: One of the largest market leaders in manufacturing, healthcare, oil & gas, construction, and more

CUSTOMER AT A GLANCE

The organization is a well-established, privately held diversified business group with a long-standing presence in the Middle East. Originally founded several decades ago as a small trading enterprise, the company began with a focused vision of building a sustainable and diversified business presence across the region.

Over the years, the organization has undergone significant growth and transformation, evolving from its initial trading activities into a large multi-business group with operations spanning numerous industries and business functions.

Today, the group comprises multiple operating entities and business units, serving a broad range of customers across both commercial and industrial markets.



Industry:
Manufacturing



Firm Size:
10,000+ employees

CHALLENGES

- The group's global shipping and logistics unit ran its sales pipeline and customer records on a separate third-party CRM platform, disconnected from the other core systems used elsewhere in the group.
- As this CRM sat in its own environment, customer and sales data lived in a silo — not natively visible or connected to other operational systems, approval workflows, or reporting the rest of the group relied on.
- Any process that needed to bridge the two environments including pulling customer data into group-wide reporting, connecting sales activity to downstream operational workflows, or keeping records aligned across systems — had to rely heavily on manual exports, re-entry, or ad hoc reconciliation between platforms.

SOLUTION

- **A purpose-built CRM** on Joget, mapped closely to the unit's existing sales and customer management workflows, so teams could transition without losing functionality they relied on day to day.
- Because it now sits on the same platform as the group's other systems, customer and sales data can be connected directly to related workflows — order processing, operational handoffs, reporting, all without needing a separate integration layer or manual bridge between systems.
- The build covered core CRM functions, including opportunity and pipeline tracking, customer records, and account management as a complete working replacement, rather than a partial tool.

RESULTS

- ✓ The logistics unit now runs its sales tracking and customer records natively on Joget, removing the data silo that previously existed between its CRM and the rest of the group's systems.
- ✓ Customer and sales information can flow into other processes directly, cutting down on manual re-entry, duplicate records, and reconciliation work that the disconnected setup used to require.
- ✓ The unit keeps the CRM functionality it depended on, now integrated into the same environment as the group's broader operations rather than sitting apart from it.
- ✓ Eventually, this has helped to create a single source of truth and significantly improved workflow productivity.



100%
Enhanced sales
tracking



100%
Improved
productivity



100%
Happier users
with less silos