



WORKSHEET

Demo and pipeline briefing matrix

Logistics SaaS Marketing Agencies: 5 Compared for Demos and ABM (2026)

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Fill this in before the first agency call. An agency that cannot work from it is not ready to sell your software.

EXHIBIT 1

Field	What to write	Your answer
Software buyer	The role that signs: head of operations, CFO, CIO, procurement	
Daily user	Who works in the product: dispatcher, planner, freight desk, warehouse lead	
Economic buyer	Who owns the budget line and what it is measured on	
Workflow replaced	The spreadsheet, phone call, portal or legacy system the product removes	
Implementation friction	Integrations, data migration, training time, IT approval	
Proof requirement	Reference customers, integrations list, security review, pilot	
Demo qualification	Fleet size, shipment volume, mode, region and system in place that make a demo worth holding	
Sales acceptance	The written rule your sales team uses to accept a lead, and who decides	

