

# USING AUTOMATED REAL-TIME ALERTS TO DRIVE IMPROVEMENT

ZMAC  
TRANSPORTATION  
SOLUTIONS USES  
MCLEOD'S  
RAPID ALERT  
NOTIFICATION SYSTEM  
TO BOOST  
BUSINESS  
PERFORMANCE



# ZMAC

Transportation Solutions is a logistics firm that specializes in the coordination of flatbed and over-dimensional freight. Our competitive advantage is the value we offer to our customers by going the extra mile to provide superior service. This is what separates us from the pack. In order to provide this high level of service, we have to keep a close watch on every customer we serve, every movement we book, and every carrier we use.

That's a lot to monitor, but we do it effectively, efficiently, and comprehensively because we work hard and use the right tools. One of our most indispensable tools is the functional equivalent of having an employee who is aware of everything that goes on in the business and works 24/7 without ever needing sleep. That tool is McLeod's Rapid Alert Notification System (RANS), and we use it as an add-on module to our McLeod PowerBroker software.



T H E A B I L I T Y



# HOW RANS DELIVERS VALUE

**R**ANS is a software tool that makes it possible to have notification messages about chosen critical events sent instantly to the specific individuals within your company who need to know. The alert is delivered through a message window, an e-mail, or a custom audible notification. For example, if someone on your staff books a load with a carrier at a rate higher than the threshold you've set, you can have RANS send you an alert the moment the carrier's rate for that load is entered into the system. With that timely notification, you'll be able to intervene before the transaction is finalized.

Here are some of the most important ways this tool delivers value to logistics providers:

- *RANS harnesses the power that comes from having real-time data at your fingertips.*

RANS gives you the ability to address potential issues as they happen. The alerts ensure that information is delivered to you immediately as events occur within your business. You can respond in time frames where action can make a difference and have a favorable impact on the outcome.

- *RANS provides vital support for achieving specific business objectives.*

Success with achieving business objectives hinges on having the right information. This software tool's flexibility allows you to choose the alerts which fit your current business needs. For example, RANS can help you focus on revenue priorities and cost reduction initiatives by generating instant awareness of events that directly impact revenue and costs.

- *RANS empowers you to manage by exception.*

RANS is triggered only when something changes, and you define which changes will generate alerts. Your staff is freed from spending time reviewing matters that are functioning normally, so that they can spend more time attending to the important exceptions which become visible immediately.

- *RANS is highly customizable.*

RANS offers options for automating almost any task, and the alerts can be sent to anyone working within PowerBroker or to any e-mail address. The recipients for each alert are

specific to that alert. The option of sending alerts to e-mail addresses means that this tool can be used to automate the process of notifying customers immediately once a load

has been delivered. In this case, RANS would be set to send out an e-mail to the customer the moment the load status in the system is changed to delivered. In fact, almost any event that occurs within McLeod's PowerBroker system can be used to trigger an alert.



# BEST PRACTICES FOR USING RANS

- *Decide what you need to know.*

The point of an alert is to draw your attention to vital bits of timely information, so the first task is determining which information is vital. Think about the daily events that need to be monitored closely, and consider how it would impact your business if these events triggered alerts. Look at weekly or monthly reports and try to identify problems that could have been prevented if the right data had been given to the right people in real-time. Then set up alerts as needed to address these issues.

- *Use alerts to support your strategic business goals.*



Look at your strategic business goals, and think about the specific events you want to track in real-time as you pursue these goals. Say for example that one current goal is to avoid low-margin moves. Decide on the minimum gross

margin you will allow, perhaps 15%, and set the alert to be triggered whenever a margin drops below this amount. As soon as the figures for each move are entered into PowerBroker, the margin is calculated instantaneously. Any time that a margin drops below 15%, an alert will go out. You'll know immediately so that you can take action as needed.

- *Send alerts to the right people.*

Choose the recipients for each alert carefully. Everyone won't need to track all of the same events. The alerts sent to a dispatcher will differ from the ones sent to a salesperson. Channel specific bits of information to the people who can act on that information.

- *Avoid too many alerts.*

It's tempting to establish alerts on everything, but there are too many events for any one person to follow. If you receive too many alerts, you start to ignore them and they lose their benefit. Choose the most critical events first, and then add more incrementally as needed.

- *Combine alerts with historical data.*

PowerBroker can provide reports that provide information of every sort. Use this historical data to provide context to the specific data events that generate alerts. For example, if you receive an alert that the margin is too low with a particular move, it might be useful to review the history with this particular customer. If the customer has a history of tight margins, you may choose to decline the load, but if the report reveals that this customer has a historically high margin, you may want to let this move go ahead as is.

- *Use alerts to teach and coach your staff.*

When initiating the use of alerts, coach your staff on how to respond to the information they're receiving. Once certain alerts are in place and in use for a period of time, personnel learn to avoid making the mistakes that are related to those alerts. As behavior changes, the need for management intervention lessens significantly.

# EXAMPLES OF ALERTS COMMONLY USED BY LOGISTICS COMPANIES

- *Order Rate*

This alert is generated when an order's rate-per-mile drops below the minimum rate as defined on the Order Rate Alert screen in PowerBroker.

- *Order Status*

Order status alerts go out any time the status of a load changes to available, progress, void, delivered, or quote.

- *Carrier Dispatch*

This alert goes out when either the movement profit percentage is below the defined profit threshold percentage or the carrier pay is greater than the maximum pay per distance you define.

- *Carrier Advance*

If someone on your staff is in the process of giving a carrier a higher advance than allowed, you can get a real-time alert.

- *EDI*

EDI alerts can be sent whenever an EDI transaction takes place.

- *Table Change*

This option opens the door to a vast array of possibilities beyond the standard alerts already available. Any field within PowerBroker can be set so that an alert is triggered when that field changes in the way you specify. For example, you can create an alert that goes out whenever a carrier has been added or terminated. The options for using the Table Change alert are also expanded through the use of McLeod's Field Marshal tool, which makes it possible for a qualified systems administrator to add new custom fields to screens. With all of these options, you can automate the delivery of data concerning any event within PowerBroker.



T O D O M O R E



# ZMAC'S CREATIVE APPLICATIONS OF RANS

**I**n addition to using RANS in many of the standard ways, ZMac has found creative ways to use this tool to support our business objectives.

- *We conduct credit checks on new customers.*

We set it up so that any time a new customer is entered into the system, our accounting department gets a rapid alert. This way we can run credit checks before we've got a load going. Before we had this alert in place, we encountered situations where a load was booked before the credit check was complete. In some cases, we received bad credit reports, which put us at risk of not getting paid for the move.



- *We focus extra resources on winning new business.*

We've used the Field Marshal tool and the Table Change function to set up an alert that goes out to our sales manager whenever a prospective customer gives us their first

quote. The sales manager can then give this matter special attention in order to help ensure that we handle this potential new customer in the best way possible to win their business. The initial contact with new accounts can set the stage for everything that follows. A fundamental part of our business strategy is to impress upon our customers that we intend to provide the highest level of service. We want them to understand this from the very start. This alert helps us focus our energy and talent on this critical task.

- *We motivate our sale staff.*

Our sales department is alerted about every load that enters our system. The volume of loads at some companies would make this impractical, but it works for us. Each member of our sales staff can see the productivity levels of everyone else. This helps newer recruits get a better sense of what an experienced salesperson can get done in a day. It creates excitement in our office and fosters a certain level of competitiveness. Overall, we've found that using alerts to provide real-time visibility into sales motivates our staff and helps elevate achievement across the board.

- *We trumpet success and recognize the achievements of individual members of our staff.*

When a new customer gives us their first quote, we categorize that customer as being in "quote" status. Once we actually start hauling freight for them, the status is changed to "active." Successfully bringing a new customer on board is something that should be recognized, so we send alerts out whenever that happens. This way, the salespeople responsible get the recognition they deserve for expanding our customer base.

# A BOOST FOR OUR BUSINESS PERFORMANCE

**M**cleod's Rapid Alert Notification System gives us the information in real-time that we need to take our business performance to the next level. Managers can respond proactively to alerts in time frames that prevent problems from occurring. Extended use of this software tool has helped our staff learn how to avoid mistakes from the start. We also use it creatively to zero in on new sales opportunities and to motivate our staff. In all of these ways and more, RANS allows ZMac to do more with our resources. We strive to provide a high level of service to our customers and one reason we succeed is that we have the power of RANS working for us.



T O D O M O R E



We can help you  
and your business *do more,  
more profitably, today!*

**877.362.5363**  
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