



BRING NEW CARRIERS ONBOARD FASTER

**McLeod's Logix Solutions Carrier Onboarding
Workflow Tool Empowers Cardinal Transport to Say Goodbye
to the Carrier Onboarding Headaches of the Past**

Brokers and logistics companies are always working to expand their carrier networks. The problem is that bringing new carriers onboard can be a cumbersome manual process that eats up precious time. Insurance and safety ratings must be checked and verified. Forms have to be faxed or emailed back and forth. Handwritten entries on paper forms can be illegible and the forms themselves can get misplaced.

To make matters worse, in many cases, you don't have time for delays, because you have a pending load that you want to give to the carrier being onboarded. If the process takes too long, you risk upsetting your customer or even losing the order. For all these reasons, onboarding new carriers can be one headache after another.

Or it can be an efficient automated process that requires very little time. That's if you make use of the Logix Solutions Carrier Onboarding Workflow from McLeod.

This essential software tool uses a combination of business process automation, rules-defined logic, and electronic forms to transform a slow, error-prone, labor-intensive chore into a quick and accurate process. It requires only a few minutes of your time and saves time for the carriers as well. The use of eForms technology ensures data accuracy and the automated workflow streamlines the process. Carriers that meet your requirements can be in the system and approved for hauling freight more quickly. Your staff will be able to focus more of their attention on other important tasks and you won't miss the opportunity for a current load you are trying to cover.





THE AUTOMATED WORLD OF CARRIER ONBOARDING WORKFLOW


- **Carrier Onboarding Workflow takes over once a new carrier is entered into PowerBroker**—Once a new carrier is entered into PowerBroker, Logix Solutions Carrier Onboarding Workflow takes over with just one click. Then you can turn your attention elsewhere while the system does the work.
- **The system examines the carrier's qualifications through an automated validation process and then scores and ranks each carrier**—The first thing that happens is the automated validation of the carrier's qualifications. Using data that is automatically retrieved from the carrier monitoring service provider you have chosen, the system scores and ranks the carrier based on a variety of criteria that you have specified.
- **There are multiple options for defining the carrier evaluation settings**—There are around 50 different criteria that you can use to validate carriers, and you set the specific thresholds that will determine whether a carrier is initially approved or rejected. For example, carriers can be evaluated on levels of insurance, current authority status, safety scores, length of time in business, and location.
- **Carriers are sent a link to an electronic carrier packet form**—If a carrier meets your initial requirements, an email automatically goes out to the carrier contact with a link to an electronic carrier packet form. The information collected by this form includes the names of the primary contacts at the carrier; details about insurance, such as coverage amounts, policy numbers, and the insurance company names; number of tractors and trailers; number of company drivers and owner-operators; preferred lanes; and more.
- **The electronic form solves several problems**—Paper forms can get stacked up in the back and forth fax process or they can be misplaced. Some of

the required data on a form may be missing and the handwriting can be illegible. Even if none of those problems arise, there is still the need to get the data entered into the system manually, which is labor-intensive and prone to human error. With the electronic forms used by McLeod, fields must be filled in with appropriate information before the form can be submitted, so there is



no danger of missing data. The headaches from trying to decipher illegible handwriting and the problems of manual data-entry are all eliminated, because all of the data that comes in on this form automatically gets transferred into the carrier master record in PowerBroker.

Time is saved and data-entry errors are avoided. Your fax frustrations are over, because you can kill that fax machine for good!

Your Profile Has Been Received
Confirmation: 

- **Carriers receive an electronic version of the contract**

—Once the carrier profile eForm has been submitted, the solution automatically delivers an electronic version of the contract, which captures a signature by typing or by signing with a finger on a smartphone or tablet.

- **Requests for W-9 forms and insurance certificates go out automatically**—After the carrier contract has been received, a second and final eForm is

automatically emailed to the carrier. This eForm requests that the carrier attach electronic copies of W-9 forms and both cargo and liability insurance certificates. The system automatically processes those documents after they are received and places the carrier into a queue within a workflow for certificate verification.

- **Your personnel are prompted to contact insurance companies**—Everything so far has been handled without any need for human intervention. At this point, the workflow prompts someone to contact the insurance companies to verify the insurance certificates. Once verification has been completed and deemed valid with the insurance companies, the carrier is automatically changed from “New” to “Active” inside of PowerBroker and is ready for use.
- **Documents are scanned and indexed automatically**—During this process, the work of scanning and indexing documents is also automated, which saves time and boosts efficiency for both you and the carrier. When the carrier packet, contract, and insurance certificates are submitted by the carrier, the images of those documents are automatically put into the “Images” tab inside the carrier master record in PowerBroker.
- **Carriers receive copies of submitted documents**—Every time the carrier fills out an eForm, an email automatically goes out to the carrier with an electronic copy of what they submitted, so that they have it for their own records.
- **Insurance expiration dates are automatically monitored**—As carriers become active, the system continues to help by monitoring for insurance expiration dates. When those dates are approaching, the system automatically sends an eForm to the carriers, prompting them to submit the updated copies of their insurance certificates. You’re never blindsided by suddenly discovering that one of your carriers has let the insurance coverage lapse.
- **You have visibility at every step**—All along the way, you have complete visibility into the process. It’s easy to check the status of any carrier application at any time.

CASE STUDY: CARDINAL TRANSPORT

Based in Coal City, Illinois, Cardinal Transport has around 7,000 carriers in its network and adds more every day. Shari Talkington, who manages the process of bringing new carriers onboard, shares how Logix Solutions Carrier Onboarding Workflow has made life easier for Cardinal Transport.

- **Our old process of qualifying new carriers was labor-intensive**—"Before we began using the Logix Solutions Workflow, we were faxing or emailing our entire carrier packet, which had the contract and assorted other documents. It was nine pages long. The carrier would fill it out by hand and either scan it and email it back or fax it back to us. Then I had to take those pieces of paper and manually enter the information into our system."
- **The Logix Solutions Workflow is automated and easy**—"We enter a carrier's MC number into PowerBroker and the system automatically transfers all of the required information from Carrier411, the carrier monitoring service. I don't have to manually enter any of this information."
- **We avoid all kinds of headaches**—"Before we had Logix Solutions Workflow, it was problem after problem. Some of the documents that came back were completely illegible. You couldn't make out the handwritten numbers they had written down. Maybe the carrier unintentionally forgot to fill out one piece of a document. Now they're filling out electronic forms through a website, and it won't let them submit it until every field is filled in. I love that! They don't have a choice. I don't have to call them back and ask them to complete anything. Maybe the fax machine grabbed two pages at once, so the second page never got transmitted. Other times one



page would be missing a signature. It was a disaster compared to the way things work now. My entire day was spent dealing with these headaches."

- **Carriers get notified automatically about insurance expirations**—"This was another problem for us. We had to manually keep track of when each carrier's insurance expired. Now the system does this for us. It checks every day and sends out notices to the carriers as needed."
- **It's simple to keep records on carriers that don't qualify**—"We set the system to rank carriers based on their current authority status, their safety scores, the levels of insurance they have, and the length of time they've been in business. We prefer for carriers to have been in business for at least a year. If they don't qualify, we leave them as inactive in the system and I insert a comment explaining why. This way, if we ever encounter that carrier again down the road, I'll have a record on why they weren't approved."
- **We have complete visibility into the process**—"If I'm curious to know where things stand on any carrier application, I can look it up quickly. The system tracks every step along the way. I can see when the packet went out, when the carrier logged into the link, when the forms were submitted, and so on. It takes just a couple of clicks and you know exactly where things stand. This is great."
- **Our dispatchers and agents are happier**—"Previously it could take much longer to get what we needed from a carrier, so the carrier couldn't take the loads the agents wanted them to handle. This created problems between our agents and dispatch. The streamlined process we have now has made life easier for everyone."
- **I have more time for other work**—"Now that I can avoid handling all of these problems, I can turn my attention to other work that helps the company become more efficient in other areas."



A MORE EFFICIENT PROCESS IS BETTER FOR EVERYONE

Brokers and carriers both benefit by eliminating the manual tasks that have long been part of validating new carriers. Automating the carrier onboarding process saves time for both parties. McLeod wants to help you move the freight more efficiently and at less cost, and that's exactly what the Logix Solutions Carrier Onboarding Workflow does. This is technology that pays for itself many times over.



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