

The Power of Performance Visibility

Load Delivered Logistics Uses PowerBroker's Vital Signs to Drive Continuous Improvement



LoadDelivered
LOGISTICS, LLC

Load Delivered Logistics, LLC, is a technology-enabled third-party logistics firm known for enabling companies to streamline their supply chains in a faster, reliable, and more cost-effective way. Founded in 2008 and operating out of offices in Chicago's "Silicon Prairie" technology corridor, Load Delivered has experience in virtually every industry and has built an impressive portfolio of customers ranging from Fortune 500 companies to small distribution networks.

From the start, Load Delivered Logistics CEO Robert Nathan wanted to know his team's stats. For Nathan, this meant more than viewing only the big picture numbers. He also wanted the details for each individual. "If you're a baseball player, you look at your individual stats as well as your team's stats," says Nathan. "If you're running a

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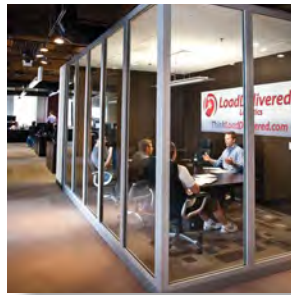
— Danny Simon
Vice President

large brokerage trading house, you’re looking at how each individual is trading and his or her stock performance. We believe it’s very similar in the trucking industry. You have to analyze individual statistics as well as team statistics.”

At first, Nathan and the management team spent large blocks of their time generating performance numbers manually. “At the start of Load Delivered, we were pulling the same performance statistics manually every night and every week,” he says. “It was taking more time than you can imagine. It pulled us away from other valuable activities. I wasn’t able to give our younger staff as much coaching as they needed.”

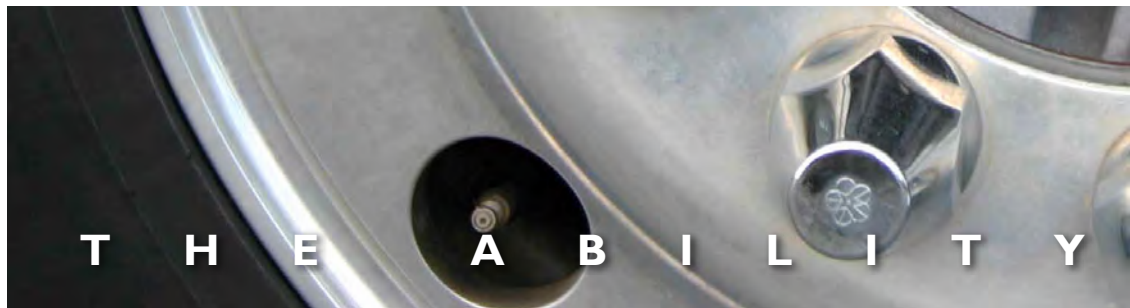
There was also the issue of data becoming stale. The numbers his team could generate manually were always dated to some degree. Without timely visibility

into performance, the chore of analyzing the data had to be done after the fact. This made it difficult to detect problems early on and take actions proactively to nip them in the bud.



This changed when Load Delivered implemented McLeod Software’s PowerBroker™ to manage all of their operations, and started using Vital Signs, a reporting tool that organizes, analyzes, and presents key performance indicators (KPIs). Vital Signs is a

built-in component of PowerBroker and it provides easy access to up-to-the-minute data on a wide range of performance metrics. “With PowerBroker’s Vital Signs, I can press one button and see all of the statistics,” says Danny Simon, VP of Operations at Load Delivered. “In the past I had to manually calculate everything. Now, with data being entered into PowerBroker in the course of executing our work every day, Vital Signs does all of the calculations for us. We have instant access to every stat we want to see. We can manage the business more effectively than ever.”



Vital Signs Brings Critical Advantages to Operations at Load Delivered



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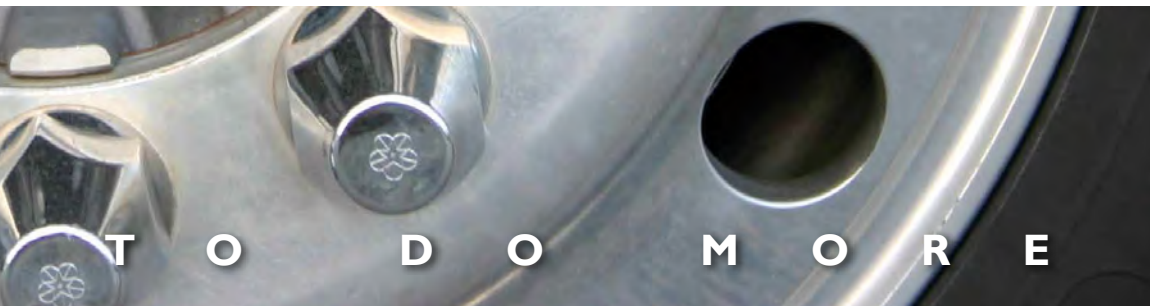
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“Having easy access to real-time data empowers us to act faster and work smarter.”

Vital Signs puts real-time operational data at your fingertips. You don’t have to spend time and energy making calculations or aggregating figures. The software does that for you. Once data is entered into PowerBroker in the course of conducting business each day, the system automatically pulls the data together to show you current figures and totals for your KPIs.

For example, brokers want to keep a close watch on margins, but at many companies, the margin figures available for review are at least a week old. Tracking margins in real-time means that you don’t have to wait until next week to know if you’re experiencing a sudden dip today. You see it immediately. You can also dig deeper to find out why and take steps to turn it around.

“Every day, every hour, we’re looking at our internal Vital Signs so that we can make decisions on how best to service customers,” says Simon. “We have real-time data that’s helping everyone on our team make timely decisions. The ability to make decisions quickly in the flow of work each day puts us at a clear advantage over the companies that don’t have such immediate access to critical information.”



“We can track operational performance from every angle.”

“We can be proactive, not reactive. We can stay one step ahead of the game.”

— Robert Nathan
CEO



Vital Signs gives you a broad range of data. You can look at data by account and by region. You can see stats for an individual employee and for the entire company. Revenue can be broken down into shipped revenue, delivered revenue, billed revenue, and gross revenue. You can check on margin, movement counts, service failures, and much more. The extensive range of options for data collection and display ensures that you will have an encompassing view of your business.

It's also easy to navigate from one perspective to another. With just a click, you can switch from daily figures to figures for the week, the month, the quarter, or the year. And you can provide individual members of your staff with only the information they need. This way, you avoid overwhelming everyone with too much data.

Nathan explains how this plays out at Load Delivered. “Our customer sales team looks at how many customers have been serviced, how many calls have been made, how many customers have been added, and so on. The operations team watches a variety of stats, including the daily movement count and

movements entered. Our carrier sales team wants to know how many loads have been booked, how many dispatches have been made, and how many dispatches have been completed, among other things.”

“Reports and analysis allows us to leverage our data in multiple ways.”

The analytical and reporting features provided by Vital Signs make it possible to turn raw data into actionable information. Load Delivered puts these features to work in several ways:

- **Reports organize information so that it's easier to digest.** “We have a long list of KPIs that we follow,” says Simon, “but anyone can review everything very quickly, because we have all pertinent data stored in one report that we helped to design ourselves.”



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- **Reporting capabilities put the right data into the right hands at the right time.** “It works on all levels,” says Kevin Green, VP of Finance. “On the back office we can run reports to see if a customer has outstanding invoices over sixty days. Once we see that, we’re able to make a real-time decision about extending credit or putting the customer on hold until they pay.”
- **Reports help plan ahead.** “Many of the reports help us forecast and project,” says Nathan. “Think about the way that stock traders are always trying to project what’s going to happen in the marketplace. We’re doing something similar with regard to the changes that may occur in the future in the trucking industry. We can be proactive, not reactive. We can stay one step ahead of the game.”
- **Reporting and analysis support efforts to pursue strategic objectives.** “I rely heavily on reports about customers,” says Nathan. “One of our strategic goals is to create a diverse portfolio of clientele, ranging from retail giants to small manufacturers. We try to avoid having any single customer account for more than ten percent of our overall business. I look at customer sales reports every day to monitor how our overall profitability breaks down per customer. I can track where we stand and what progress we’re making toward our goal.”

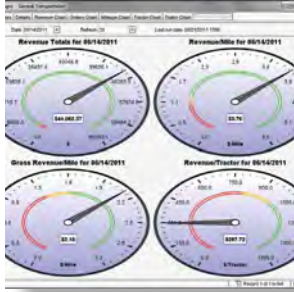
“We use graphics to make metrics easier to comprehend and digest.”

At a glance, a list of figures is just that—numbers. You have to take a few moments and study it to get a sense of what the numbers are telling you. But present those same figures graphically in a bar chart, a pie chart, a graph, or a dial, and you can see instantly what the numbers reveal. Cold figures come to life.

The options within Vital Signs include not only the various graphic displays

just mentioned, but also the ability to superimpose one graph on top of another. You can see your profit in contrast to your profit goal. You can track how margin, revenue, or moves compare over four quarters, twelve months, or five days. If there’s a





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repeating pattern where revenue takes a significant dip every Friday, you’ll see that in an instant with the right chart.

“With Vital Signs I can literally press a button and up comes a pie chart of our top ten customers broken down for profit,” says Nathan. “For example, I may glance at this chart and see that today 14% of our overall profit was with one customer, but for the month, it was 6.6%. I’m not spending valuable time pouring over lists of numbers in search of their meaning. I can learn what I need to know quickly and easily.”

“It’s easy to drill down for additional details.”

Isolated KPIs may be useful, but the value is limited if you can’t make connections between various data points. Your numbers may be good or bad, but either way, you need to be able to get surrounding data to provide context. This is how you can determine why the change occurred, and knowing why is essential for choosing the right actions to take in response.

Vital Signs allows you to find additional data quickly. You can drill down and get more extensive information as needed. “If our margin suddenly changes, we want to know a few things right away,” says Simon, “which customers are involved, which carriers, and who booked the freight. It’s easy to navigate between screens to pull up all of this information and more.”

Vital Signs Works to Help Individuals Reach Performance Goals

The management team at Load Delivered uses Vital Signs to motivate and support the entire team. Business improvement comes when people take the right actions, but how do you know which actions are the right ones? Vital Signs helps in two ways. One is that it provides a clear view of the results of the actions that have been taken. This makes it possible to evaluate performance and make adjustments as needed.

Vital Signs also has played a powerful role in helping the Load Delivered Team learn more quickly. Improvement occurs more slowly when people have to wait



a week before they can see how their actions are affecting their performance. If they can see their performance stats daily or even hourly, they're empowered to make the right adjustments that much faster.

At Load Delivered each team member works with goals for the short term and the long term. "We have individual meetings where we sit down and analyze the reports," says Nathan. "From there we try to formulate logical and realistic goals. Once they get to work, I don't have to tell them their stats. They can look them up themselves. Having visibility into their own performance metrics is the perfect motivator."



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— Ross Vigil
Director of
Marketing

The Broader Impact of PowerBroker on LoadDelivered

New technology always brings a learning curve, but the entire McLeod PowerBroker system implementation at Load Delivered caused only a minor disruption. "It was turnkey," says Ross Vigil, director of marketing at Load Delivered. "The day we went live with McLeod, we were utilizing their reporting. We bought the system so that we could analyze our business and that's exactly what we were able to do. Everyone on the staff was impressed and excited."

Load Delivered uses PowerBroker to strengthen their relationships with both customers and carriers. "PowerBroker boosts every aspect of our business and it shows," says Vigil. "Our technology impresses our customers. I've been in meetings with customers who have used the largest publicly-traded companies in our industry and they say, 'Wow! I can't believe the customized reports we get from you guys at Load Delivered. This information is highly valuable to us. We never got that at our old provider.'"

One example is the use of McLeod's Rapid Alert Notification System. "Customers love real-time access to order-delivery status," says Vigil. "As soon as an order is input into our system, Rapid Alert sends the customer a standard update electronically via e-mail, saying that the order shipment is entered. Additional e-mail notifications go out as the load gets delivered, so the customer has full visibility on their shipment. A lot of times, our customers forward these e-mails to their customers. That really makes me happy when our customers are using our information to facilitate their business relationships."

“Vital Signs has empowered our team, and it will be a big part of our future.”

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CEO

“PowerBroker also helps our carriers” says Simon. “It’s easier for carriers to work with us on all levels. Many carriers prefer to work with a technology-enabled logistics firm. We can process documents much more efficiently than 3PLs who are still doing it all manually, working with paper and fax machines. Also, our staff has access to the system 24/7 so if a carrier is calling at 2:00 a.m. with a critical issue, they don’t have to be at the office. The rep can log on remotely, have access to the system, get the driver the information he needs, and he’s on his way. With companies that don’t have this capability, you’d have to wait until 8:00 a.m. before you could get the situation handled, because you’d have to wait until a dispatcher arrived at the office.”

McLeod Powers Performance Improvements

In all of these ways and more Load Delivered has used PowerBroker and Vital Signs to move the company forward. “I can’t put a number on it, but there’s no question that Vital Signs has helped fuel our growth,” says Nathan. “We let our people see their stats, then they take the information and run with it. Vital Signs has empowered our team, and it will be a big part of our future.”



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

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