

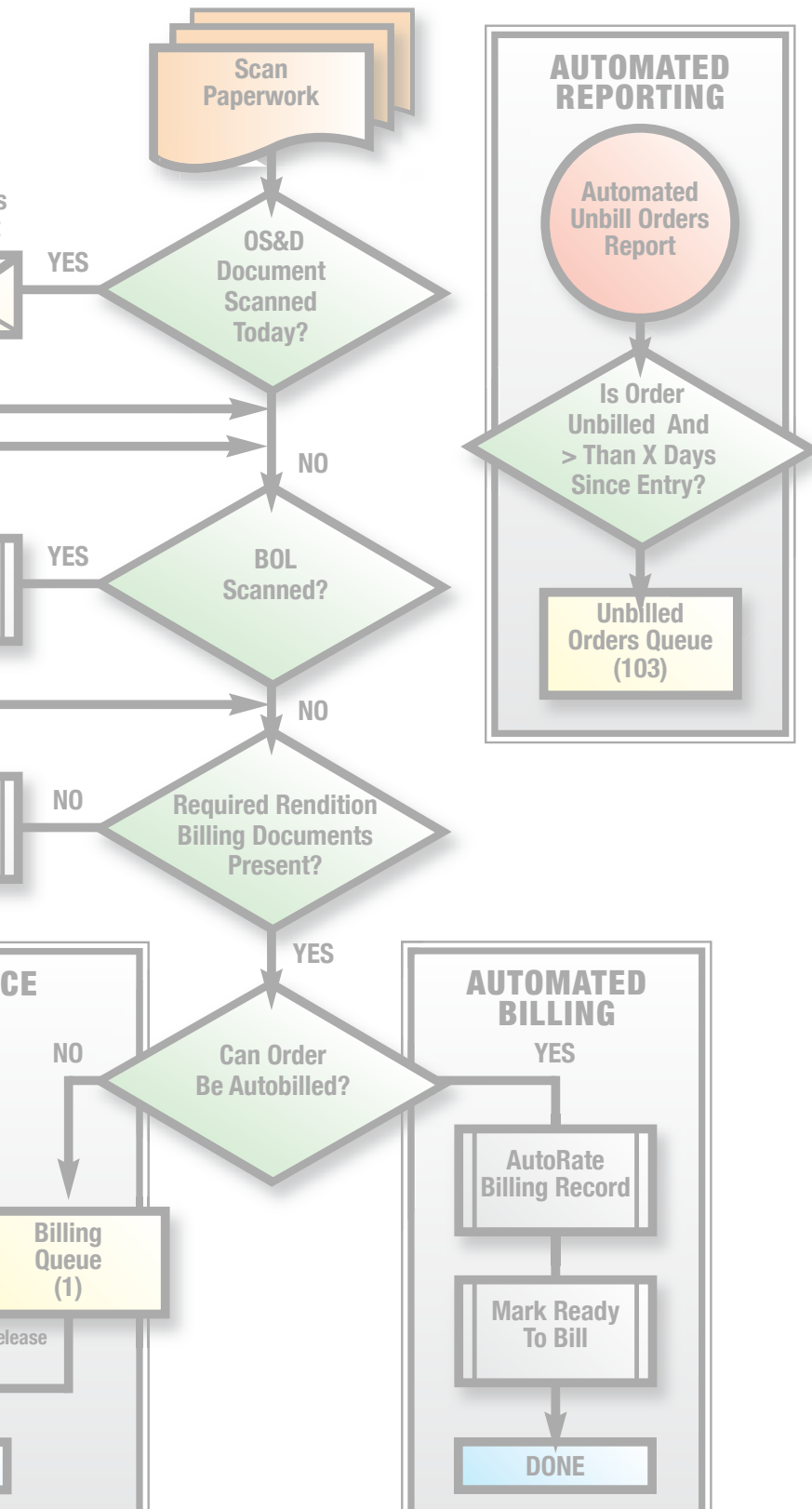
Business Process Improvement and Automation

What Brokers Gain When Processes are Streamlined

BY MIKE AYERSMAN

Successful freight brokers of every size are never content with the status quo. They're always looking for ways to become leaner, tighter, and more efficient. They want to know: Can we find a way to get customers and carriers qualified more quickly? What can we do to shorten the billing cycle? How can we improve our service to our customers and strengthen our relationships with our carriers?

The fact is that there are ways to do all of this and more. The key is using a systematic method, supported by a modern workflow and imaging software system, to improve and automate your business processes.



TO DO MORE



Item	Month	Tracked	Untracked	Tracked	Untracked	Total
Account Receivable	\$41,121.1	\$ 1,100.00	\$40,021.1	\$40,021.1	\$40,021.1	\$81,042.2
Accounts Payable	\$55,360.00	\$55,360.00	\$0.00	\$0.00	\$55,360.00	\$55,360.00
Inventory	\$1,100.00	\$1,100.00	\$0.00	\$0.00	\$1,100.00	\$1,100.00
Fixed Assets	\$10,000.00	\$10,000.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00
Equity	\$10,000.00	\$10,000.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00
Liabilities	\$10,000.00	\$10,000.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00
Total	\$100,000.00	\$100,000.00	\$0.00	\$0.00	\$100,000.00	\$100,000.00

The software tools available today can help you streamline your day-to-day operations in several ways that directly affect your bottom line. With this technology in place, you can remove some of the steps in your business process while dramatically reducing errors.

It all starts by making sure that you understand your business processes as they currently exist. What is the specific nature of the business conducted by your company? How are tasks routinely handled? What are the steps in your business processes? What rules are followed?

Then think about how these business processes could be improved. Look for patterns of waste and steps that could be eliminated. Try to create streamlined processes that can be managed more easily. Define business rules in the most straightforward and logical manner possible. Think about how the changes can make it easier to train new people.

Part of the work of improvement is employing information technology and today there are several

software tools that have become indispensable for achieving process improvement goals. Two of the most prominent examples are document imaging and workflow automation. Here are some of the ways in which these tools perform their magic:

Expediting decisions

The typical brokerage company is swimming in documents that need to be processed in multiple ways. Document imaging makes it possible to capture documents at the earliest possible opportunity. In order to facilitate this, the business rules that describe how to process documents are defined and incorporated into the automated workflow system. As a result, people are prompted to act at the earliest point in a process when the information they need becomes available.

This compresses cycle times for all kinds of brokerage work. You could be handling the



THE ABILITY



paperwork needed to qualify a new customer or a new carrier, you could be responding to a claim, or you could be managing any part of the cycle of a load, from tendering it to billing it. When the documents required to attend to any of these tasks are processed electronically, they don't get lost, they don't sit idle for days or even hours on someone's desk, and they are easily accessible when needed.

Prompting someone to act is good, but the prompt is wasted if that person doesn't have all of the information necessary for deciding which action to take. Imaging and workflow tools help make sure that everything is there when a decision needs to be made. Once a document exists electronically, it can be indexed according to its function. This enables the software to keep all relevant documentation together and ensures that all relevant information is gathered and presented at the right time. When decisions are expedited in this way, tons of time and energy are saved, productivity and efficiency go up quickly, and personnel are utilized more effectively.

Simplifying documentation

One of the compelling advantages that imaging software provides is the ability to simplify documentation by creating electronic forms. You can create packets of electronic documents that are customized for such tasks as qualifying new customers and new carriers. The electronic packets can be sent out and returned electronically. Upon return, the documents are automatically sent to the appropriate person, so that they can be quickly reviewed and validated.

This is extremely important in the brokerage industry. When you work with hard copies that must be mailed or faxed, it can take days to get a customer or carrier qualified. That's too long. With workflow and imaging tools, the process can be completed in hours. You can start picking up loads right away from your new customer and start assigning loads to your new carrier just as quickly.



TO DO MORE

Integrating with customers and carriers

As information technology becomes more widespread within the trucking industry, more and more companies are finding ways to interface with each other, and the benefits flow both ways. For example, if your carriers have in-cab scanning or if the drivers use truck-stop scanning, you may be able to work with them to reduce the billing cycle time. You can have the driver's paperwork forwarded to you at the same time it's being sent to the carrier's home office. This prevents you from being forced to wait several days for someone there to process it first.

Getting documents processed quicker also allows for "quick pay" settlements so carriers have their pay faster. Many of the small carriers that brokers use are cash strapped, so this option is particularly valuable. Of course, all smart carriers are eager to do anything that will shorten the billing cycle. This is good news for brokers, given that customers can't be billed until all of the carrier's documentation has been received. Using technology in this way helps everyone.

Improving and automating business processes ultimately affects the bottom line by improving

efficiency and productivity. But there's even more. In addition to helping you conduct business, making these changes will help you get more business. Shippers and carriers can see that working with you is easier than working with brokers who haven't automated their processes. You can provide a much higher level of service at both ends. The kicker is that you can do all of this while reducing your costs. That's an impressive combination.

Mike Ayersman is National Sales Manager—Imaging at McLeod Software. He can be reached at Mike.Ayersman@McLeodSoftware.com, www.McLeodSoftware.com, or (509) 448-4798.

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

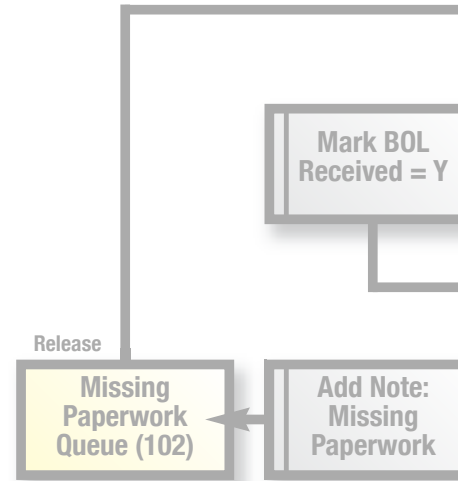
www.McLeodSoftware.com
877.362.5363 | Fax 205.823.0000
2550 Acton Road | Birmingham, AL 35243

©2010 McLeod Software 1110



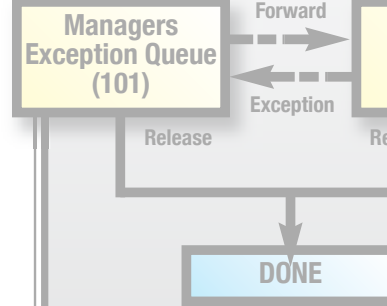
THE ABILITY TO DO MORE

Email Claims Department



Mark BOL Received = Y

USER INTERFACE BILLING



THE ABILITY