

FREIGHT BILL AUDIT & PAYMENT

SPARKING SUPPLY CHAIN SYNAPSES

Supply chain analysis and insight have become top of mind over the past 18 months. These freight bill audit and payment (FBAP) firms conceive solutions and activate process improvements for shippers' transportation networks and strategies.



As the business world becomes more global, fast-paced, and competitive, organizations require timely and accurate insight to continue to thrive. Leading freight bill audit and payment (FBAP) firms are offering solutions and insight that can help shippers optimize their transportation networks and strategies.

Solutions that automate payments or check whether freight bills reflect contract terms remain essential. However, the past few years have witnessed “a shift to providers that are leveraging technology and the rich data that comes from transportation invoices to help shippers become smarter and more efficient,” says Hannah Testani, chief executive officer with Intelligent Audit, a supply chain technology services company focused on reducing transportation costs.

This insight has become critical over the past 18 months. To navigate the changes in the freight market, it’s no longer enough to know where your freight is, nor to know your costs, although both are key, says Nate Endicott, senior vice president of global sales, marketing, and partnerships with RateLinx, which offers a supply chain shipping, visibility, payment, and analytics platform. “To optimize your freight network and costs, you have to be able to tie the two together,” he adds.

As costs rise and capacity remains tight, “everyone is trying to wrap their arms around their data to find ways to mitigate the impact of these market conditions,” says Michael Falls, director, global strategic solutions with enVista, a global provider of freight audit and payment solutions.

Eighteen months ago, many shippers focused on assembling data across all modes to gain full visibility to their transportation networks. As COVID hit, more searched for technology that would allow them to optimize spending by, for instance, reducing surcharges.

Over the past eight months or so, shippers have been requesting technology that helps them reduce transit time and better serve their customers, Falls says. For instance,

they might evaluate parcel service levels to check whether they’re using express services over short distances when they could be using ground or home delivery, saving time and money.

More recently, shippers are looking at reducing non-value-added activity and optimizing their workforces. “That’s a huge transformation over 18 months,” Falls adds.

BEHIND THE DEMAND FOR DATA

One driver behind the need for greater freight data and intelligence is the recent supply chain disruptions. “It’s pure whack-a-mole when it comes to supply chain disruptions,” says Ross Harris, chief executive officer with A3 Freight Payment, which offers comprehensive spend management solutions.

“The more disruptions, the more you need visibility into your data,” Testani says. It’s difficult to save, say, 5% of your spend if you don’t know what your spend is, she notes.

As global sourcing grows, companies are finding that “a more global perspective as they manage their transportation expenses” can provide competitive advantages, says Thomas M. Zygmunt, manager of marketing, business development and promotion with Cass Information Systems, Inc., which provides freight and utility invoice payment services.

At the same time, the rise in e-commerce has magnified the need to manage parcel expenses. This includes auditing for duplicates, rates, and compliance and service failures, Zygmunt says. As important, companies are looking to allocate parcel spend to meet complex general ledger requirements and understand their true cost per package, he adds.

Transportation expenditures also are attracting more scrutiny from senior executives, says Keith Snavelly, senior vice president, global sales, with nVision Global, a freight audit service company. A growing number recognize the impact supply chains can have on an organization’s success.

This awareness is prompting supply chain leaders to look for technology that can automate transaction processing, resolve invoice discrepancies, and provide insight.

Also impacting the FBAP sector are the retirements of many experienced traffic and transportation experts, says Allan J. Miner, president of CT Logistics, a provider of freight bill audit and payment services.

Often, new leadership lacks the core hands-on experience that those retiring had. As a result, organizations are relying more heavily on their service providers.

More third-party logistics providers also are seeking freight payment providers, says Craig Cameron, vice president, sales and marketing, with

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FREIGHT BILL AUDIT & PAYMENT: Sparkling Supply Chain Synapses



Freight bill audit and payment firms gather data across all modes to provide visibility into transportation networks, storing the information in secure data centers.

A3 Freight Payment. The growth in their businesses has highlighted the lack of scalability in their current freight audit models, just as their customers' interest in these services is increasing.

THE PANDEMIC'S IMPACT ENDURES

The pandemic also continues to disrupt the sector. "With volumes continuing to go berserk, you have a new abnormal in which shippers are moving more freight and spending more dollars, and they're trying to keep track of where, how, and with whom they're spending it," Endicott says.

Additionally, the transportation market remains more variable, with rate changes in transportation verticals more frequent, says George Kontoravdis, founder and president of Fortigo, which automates, optimizes, and audits logistics decisions.

For instance, many ocean carriers no longer offer firm rates. Instead, they change them at least weekly, if not more frequently. Rate volatility likely will remain for the near-term due to the dramatic reduction in capacity, and the time required to bring ships back online, he adds.

Many shippers are recognizing that ocean and air shipments differ dramatically from other types, says Phil Marlowe, president and chief logistician with Acuitive Solutions, a global provider of freight management solutions.

"With parcel and LTL, a shipment is a shipment," he says. "They have few moving parts."

In contrast, ocean shipments may be split across several bills of lading and customs procedures, leading to multiple invoices that are related, Marlowe notes.

So, six invoices may relate to the same container. While each should reflect one-sixth the freight cost, they're often processed as six separate bills, he adds.

ELIMINATING MANUAL PROCESSES

The pandemic also hammered home the recognition that "manual processes are virtually impossible," Marlowe says. With many physical offices closed, FBAP providers need to be able to electronically pass information from step to step in a process.

Even as the disruptions continue, the FBAP industry is stepping up. "Freight audit and payment kept supply chains fluid and funded over the past 18 months," says Roberta Tamburrino, president, freight audit and payment with AFS Logistics, a provider of supply chain consulting and logistics services.

"The industry continues to thrive by providing critical data and analytical tools that help shippers optimize their global supply chain, while providing audit savings, as well as lowering

the internal costs of processing their invoices in-house," Snavely says.

The following companies are helping shippers achieve these goals.

A3 Freight Payment: Providing In-Depth Insight...In a Click

A3 Freight Payment provides its customers the in-depth insight they need to effectively manage their businesses and boost performance through a mix of precise customization, quality customer service, and efficient processing.

At the same time, A3's solutions require a minimum commitment of IT and management resources from its clients. While many of its clients have annual transportation spending of at least \$30 million, A3 works with many smaller shippers that are looking for greater insight into their transportation spending.

Over the past few years, A3 has enhanced its offerings to provide new analytical tools in transportation spend management. With just a click or two, shippers can easily access insight that can intelligently guide business decisions, says Craig Cameron, vice president, sales and marketing.

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“WHEN YOU GET INTO TRANSPORTATION SPEND MANAGEMENT, THAT’S WHEN YOU GET CHANCES TO HIT HOME RUNS.

- CRAIG CAMERON
VP, SALES AND MARKETING
A3 FREIGHT PAYMENT

A3 transportation spend management analytical tools enable shippers to dig into their spending in the depth and comprehensiveness that previously was available only by engaging teams of high-priced consultants. “Our tools enable forward-looking analytic work, often with just a click or two,” says CEO Ross Harris.

By using artificial intelligence to spot both trends and anomalies, A3 is able to notify shippers when their transportation operations are deviating from plan, without requiring manual intervention. “Then they can act proactively,” Cameron says. This automated delivery of information is key, as many clients handle millions of transactions annually.

In addition, a new supply chain financing solution (sometimes referred to as terms extension) offered by A3 enables clients to extend and improve their working capital. A3 will pay its clients’ transportation service providers at or before the established due dates. Shippers can then pay A3 according to a schedule that better fits their working capital needs.

Shippers working with A3 Freight Payment benefit in several ways. Those that outsource payment processing generally save about \$2 per invoice, Cameron says. As a rule of thumb, freight bill auditing generates ongoing savings of about .5%, he says, noting that initial savings usually are much higher.

When completing an audit, A3 engages in a thorough business review. “We don’t just look for individual rate errors,” Harris says.

Auditors take a comprehensive approach, checking, for instance, that the shipper is responsible for the bills in the first place and whether any bills have been duplicated.

“Then, when you get into transportation spend management, that’s when you get chances to hit home runs,” Cameron says. For instance, an analysis might show employees are paying more because they’re neglecting to use contracted carriers.

UNCOVERING SAVINGS

An electronics manufacturing services firm contacted A3 for assistance in measuring and monitoring its parcel

shipping activity so it could more accurately identify vendor chargebacks and internal shipping compliance across multiple locations. Before working with A3, the firm’s process for running queries was cumbersome and time-consuming. In addition, it was only able to estimate, rather than calculate, the cost it was incurring from non-compliant shipments.

When the team at A3 reviewed the company’s processes, they identified numerous anomalies in its data that made it difficult to accurately analyze it. A3 normalized and then analyzed the data once more. They were able to pinpoint where internal compliance was lacking and identify opportunities for less expensive shipping. Their work uncovered annual savings totaling \$1.2 million.

Acuitive Solutions: Solving Customer Puzzles

For its corporate symbol, leadership at Acuitive Solutions chose an origami bird. “It’s a puzzle,” explains Phil Marlowe, president and chief logistician. “Rather than force customers to do things our way, we designed our software so we can solve their puzzles.”

The founders of Acuitive Solutions are “logisticians with experience on both the carrier and shipper sides of transactions,” says Jarrett Crosby, director of value engineering with the Charlotte, North Carolina-based firm. “They know how supply chains work.”

Acuitive’s solutions enable shippers to replace emails and spreadsheets with rules-based workflows that allow them to collaborate and manage shipments in real time and without direct, manual involvement.

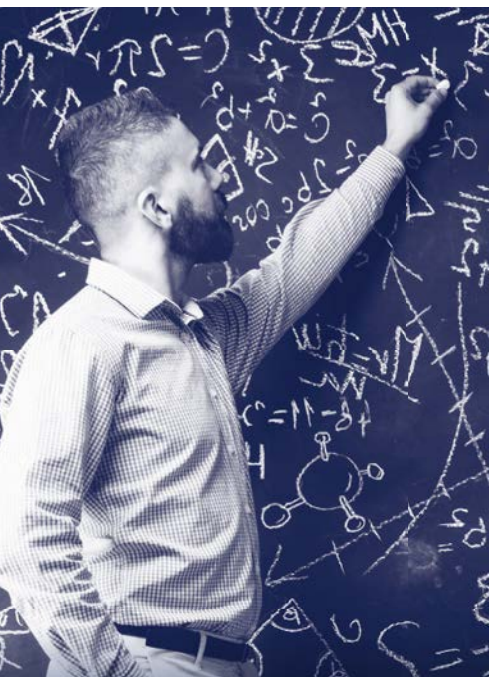
To ensure data integrity, each client engagement starts with a robust pre-audit process. While some FBAP providers check invoices to various tolerances and then flag outliers, Acuitive receives data



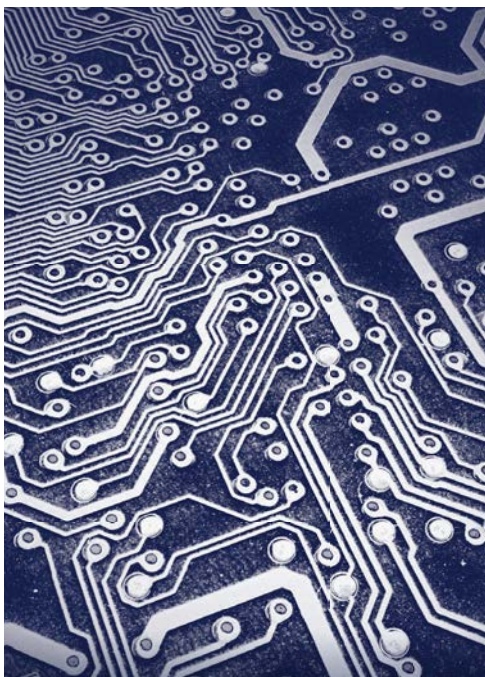
“A3’S TRANSPORTATION SPEND MANAGEMENT TOOLS ENABLE FORWARD-LOOKING ANALYTIC WORK, OFTEN WITH JUST A CLICK OR TWO.”

- ROSS HARRIS
CHIEF EXECUTIVE OFFICER
A3 FREIGHT PAYMENT

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-PHIL MARLOWE
PRESIDENT AND CHIEF LOGISTICIAN
ACUITIVE SOLUTIONS

with the carrier without the retailer’s involvement. As a result, the retailer now approves invoices seven to eight days before shipments are estimated to arrive, eliminating short and over-payment challenges.

“As Acuitive grows, we continually focus on what customers need next,” Marlowe says. “We’re always thinking about where the market is going and how we can use our skill sets to solve industry problems.”

from carriers, 3PLs, and forwarders.

It automatically validates the correct invoices and flags discrepancies, essentially auditing invoices as they’re generated. “It’s the backbone of our system,” Crosby says.

And rather than settling for statistical sampling of invoices, Acuitive’s solution audits each one, processing the vast majority without human intervention. (The exact percentage varies between modes.)

“Because the AcuAudit prepayment freight audit solution keeps errors from hitting shippers’ books in the first place, they’re simpler and quicker to correct,” Marlowe says.

“Companies that lack a prepayment audit can expect about 20% of their ocean invoices to contain errors,” he adds. “Within 90 days after we implement the Acuitive solution with a client, that number drops to 8% because carriers can immediately see what they’re doing incorrectly.”

In addition, “Acuitive’s experts don’t just tell clients there’s an invoice error,”

Marlowe says. “They also let them know what’s wrong, so they can fix it, resubmit the invoice, and receive payment.”

“These capabilities have become more critical as the pandemic has prompted shippers who went from negotiating rates a few times a year to now negotiate several times a week,” Crosby notes.

FABRICATING A SCHEDULING SYSTEM

Acuitive’s work with the largest fabric and craft retailer in the United States shows how its solutions can save money and foster business growth. Previously, the retailer audited only a portion of its freight bills from the approximately 5,000 ocean container shipments it received annually from Asia and the Middle East. Its cumbersome and labor-intensive process hindered efforts to do more. As a result, containers were held up to resolve invoice issues.

Acuitive developed an FBAP scheduling system that automatically processes all the company’s invoices and resolves flagged discrepancies

AFS Logistics:

Evaluating Data to Enhance Performance

Freight audit and payment has been the cornerstone of AFS Logistics since it launched nearly 40 years ago. “It’s both our past and our future,” says Roberta Tamburrino, president, freight audit and payment.

The 1,700-plus clients of AFS range from multinational enterprises to plucky startups, and span most industry sectors. No matter their size or industry, AFS leverages its knowledge, technology, and experience to help each organization review and evaluate shipment data to identify ways to redirect efforts to enhance performance.

Here’s one example. When working with a multinational retail chain with a growing e-commerce business, AFS discovered inaccuracies in cost, price, and shipment data, as well as failures to comply with the service level agreement. Because the retailer ships more than 87 million parcel shipments annually, it needed an automated system to uncover these inaccuracies.

By working with the carrier to develop a short-pay resolution, AFS is helping the client save more than \$400,000 annually. AFS’s automated processes cut reporting time from more than four hours each week to several minutes.



FREIGHT AUDITING “CAPABILITIES HAVE BECOME MORE CRITICAL AS THE PANDEMIC HAS PROMPTED SHIPPERS WHO WENT FROM NEGOTIATING RATES A FEW TIMES A YEAR TO NOW NEGOTIATE SEVERAL TIMES A WEEK.”

-JARRETT CROSBY
DIRECTOR VALUE ENGINEERING
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Contact us at Info@AcuitiveSolutions.com to explore the value proposition we can provide your business, whether you're a shipper or a freight forwarder.



Each year, AFS audits more than 300 million invoices and manages more than \$10 billion in spending, working at the intersection of the financial and physical supply chain. For instance, AFS worked with one client to provide visibility for less-than-truckload shipments, enabling the organization to see when a load is tendered and track when it's delivered. Using this data, it can assign

contracted rates to the shipment and then issue payment.

"They don't even have to issue invoices," Tamburrino says, noting that AFS "is driven to make things easy for its clients."

GOING THE EXTRA MILE

Particularly over the past 18 months, AFS's commitment to going the extra mile to help its clients address their

challenges has become evident in multiple ways.

For instance, in spring 2020, as many companies were working overtime to try to understand and manage through the pandemic, a multinational biosciences firm sought out AFS after its previous freight audit provider ceased operations, leaving the firm unable to consistently pay its carriers on time. As a result, it was missing shipment opportunities.

Selecting a FBAP Provider: Top 6 Questions to Ask

Before engaging a new freight bill and audit payment provider, shippers can ask a few key questions to check whether the company is right for them. They include the following:

1] What technology are they employing? "The days of just auditing information and getting refunds are a thing of the past," says Testani of Intelligent Audit. Providers need to be able to leverage technology to conduct robust audits, and to alert customers to actions they can take to become more effective shippers. The technology also should be flexible enough to provide for future growth.

2] How truly global is the provider? If a shipper requires services around the world, the provider should also have processing centers around the world. "This is critical to ensure the freight audit and payment firm is conducting business in local languages and time zones while providing the regional expertise that multinational corporations have come to expect," says Snavely of nVision Global. The provider should work on a global processing application that can provide a single data warehouse of shippers' global transportation activity, he adds.

3] How established and trustworthy is the firm? Allan Miner of CT Logistics suggests asking how long the company has operated in the freight audit market, and how long its current ownership

structure and banking relationships have been in place. Check whether the company has been involved in any lawsuits in the past 20 years, and whether it has changed its name in the past 20 years.

4] How will your funds and data be handled and what visibility will you have into the process? "Saving money is only part of the equation," notes Pape of U.S. Bank. Because freight bills contain competitive information about each company's supply chain, any savings gained won't matter if the provider has a data breach. A quality provider will have processes and procedures in place to ensure online security and maintain transaction integrity. It also should have a fiduciary responsibility to its clients.

5] Does the provider monitor trends in the industry and in freight spending? Leading providers will do so. "And they know how to connect ideas to troubleshoot problems," says Tamburrino of AFS.

6] Will the company be a comprehensive partner? "It's much more than being able to process invoice data, validate carrier rates, and pay bills," says Michael Falls of enVista, noting these services are table stakes at this point. A true partner will not just process freight bills, but also will be able to provide, among other capabilities, systems integration, intelligence, and consulting.

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**“FREIGHT AUDIT AND PAYMENT KEPT SUPPLY CHAINS
FLUID AND FUNDED OVER THE PAST EIGHTEEN MONTHS.”**

—ROBERTA TAMBURRINO
PRESIDENT, FREIGHT AUDIT AND PAYMENT
AFS LOGISTICS

While onboarding a client of this size normally requires several months, AFS dedicated a team that worked around the clock to complete the launch within one week.

“They were able to reroute all invoices to us, and we processed them flawlessly,” Tamburrino says. The company has since added AFS’s transportation management solution.

More recently, AFS launched a freight audit platform that “enables a true, frictionless process with unparalleled data capture,” Tamburrino says. Both shippers and carriers can see and update all documents through the platform, making it actionable.

The reception has been overwhelmingly positive. When Tamburrino and her team presented the new solution to a top-tier technology company, the client said, “Wow, that is joyful,” Tamburrino says. “We’re delivering joy in freight audit.”

AR Traffic Consultants, Inc.:

Providing Compelling Savings

AR Traffic Consultants, Inc., which offers advanced transportation management software and services, has been helping clients boost the efficiency, accuracy, and auditability of their freight bills, as well as lower freight costs, for nearly 60 years.

Among other key capabilities, AR Traffic can allocate freight costs on

shipments, so shippers can calculate the cost of transportation at the item level, says Nick Fisher, director of sales. This is key, as shipment costs can vary even between, for instance, short-sleeve and long-sleeve t-shirts—the latter will weigh slightly more, boosting transportation costs.

CalcRate from AR Traffic offers a sophisticated search engine and freight pay system. Because it interfaces with clients’ order-entry and warehouse management software, shippers can use it—before committing to a shipment—to determine freight charges and identify the carrier with the lowest rates and most effective timing for each shipment, Fisher says.

CalcRate’s sophisticated auditing and freight pay functions also allow shippers to readily check for billing errors. With this information, they can approve only appropriate payments, saving money and preventing time-consuming and costly claims.

All freight history is preserved, so clients can track trends and compare rates and discounts from year-to-year.



**AR TRAFFIC’S ‘CASCADE’ MODEL “STREAMLINES
OPERATIONS AND STEERS MORE BUSINESS TO THE
CARRIERS MOST LIKELY TO BE RIGHT FOR CLIENTS
AND THEIR LOADS.”**

—NICK FISHER
DIRECTOR OF SALES
AR TRAFFIC CONSULTANTS, INC.

AR Traffic’s shipment history portal also identifies the shipments for which clients have paid their carriers, as well as the shipments customers have tendered, but have not yet been billed for, Fisher says.

This is key to estimating accruals. “Because accruals are liabilities for shippers, tallying them is another area of emphasis for clients,” he adds.

To help clients understand their supply chain costs and the potential impact of changes, AR Traffic provides a number of analytical studies at no charge. For instance, clients may engage AR Traffic to help understand the impact on transportation costs if they move a distribution site or open a new one.

DELIVERING KEY INSIGHTS

AR Traffic also provides a range of insightful benchmarking reports. These show clients how their carrier contracts compare to those held by others in the same industry that have roughly the same volume and product mixes.

Similarly, AR Traffic has been providing a growing number of opportunity reports; these are essentially the inverse of ‘what if’ reports, Fisher notes, and provide metrics identifying potential after-the-fact opportunities.

For instance, a report might highlight how often a shipper failed to use the most economical carrier in its database or neglected to consolidate multiple shipments to the same customers.

When helping clients identify viable carriers, AR Traffic has shifted to a “cascade” model, Fisher says. Instead of posting a load waiting for any

INFORMATION

VS

INSIGHT

Up to 20% of freight invoices include errors. Most aren't your fault — but they're all impacting your bottom line. AFS pre- and post-auditing experts catch every discrepancy with incredible efficiency. More importantly, we help you learn from them, or even avoid them. We capture critical data and transform it into actionable insights so you can make informed decisions and unlock supply chain profitability.

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- Industry-leading experience + state-of-the-art technology



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shipper to reply, they'll pick a carrier, immediately tender the load, and only if the carrier declines will they move to another carrier.

"This streamlines operations and steers more business to the carriers most likely to be right for clients and their loads," he adds.

All these services can drive compelling savings. One example: AR Traffic conducted a site selection study with a manufacturer and distributor that sourced products from suppliers scattered across southern California and to the Pacific Northwest. They identified several sites that would cut transportation costs by 30%.

"Freight rates to their users from the new origin points were more economical," Fisher says.

Cass Information Systems, Inc.:

Providing a Competitive Advantage Through Business Intelligence

Cass, a leading provider of freight audit, payment, and business intelligence services, can leverage its more than 60 years of experience of providing solutions to major corporations that have complex transportation payment and information needs.

"By understanding our customers' critical transportation and accounting processes, we provide customized business intelligence solutions that help create a competitive advantage through reduced costs, increased efficiency, and better decision-making capability," says Thomas M. Zygmunt, manager of marketing, business development and promotion.

Many of Cass's clients are Fortune 1000 companies that need to manage tens of millions of dollars in freight spend and/or millions of packages shipped, Zygmunt says, adding that they're searching for best

"CASS PROVIDES CUSTOMIZED BUSINESS INTELLIGENCE SOLUTIONS THAT HELP CREATE A COMPETITIVE ADVANTAGE THROUGH REDUCED COSTS, INCREASED EFFICIENCY, AND BETTER DECISION-MAKING CAPABILITY."

-THOMAS M. ZYGMUNT

MANAGER, MARKETING, BUSINESS DEVELOPMENT AND PROMOTION
CASS INFORMATION SYSTEMS

practices to control and manage their transportation expenses.

While North America has been a primary market, a growing number of companies are expanding their requirements globally. Cass currently processes invoices covering 185 countries and can work in 114 currencies.

Cass worked with a multinational provider of energy and automation digital solutions for efficiency and sustainability. It had been centralizing management of its transportation operations—a daunting challenge, given that it operated in more than 100 countries and with seven global transportation control towers.

In a comprehensive, phased initiative, Cass helped the company standardize global reporting on shipments and spending, negotiate contracts with its largest global carriers, and improve carrier billing.

Total savings range from 1% to 5% of freight payments; the exact percentage varies by geographic region, transportation mode, and carrier. Given that industry averages showing the cost to process a payable invoice range between \$8 and \$12, the savings can be considerable, Zygmunt notes.

HELPING SHIPPERS FIND SAVINGS

Cass also serves small- to medium-size companies that have substantial freight or parcel volumes and are looking to audit their shipments to reduce processing costs and generate actionable transportation data.

For instance, Cass deployed its robust business intelligence engine to help one company reduce most "first overnight"

shipments for demo materials used by its salespeople. Instead, it shifted to standard overnight and then held the materials at a service provider's distribution center. Annual savings total roughly \$1 million.

While Cass customizes its processes to each client's specific needs, the goals remain largely the same: reduce processing expenses through an outsourced freight rating, audit, payment and business intelligence solution; gain processing efficiency through process automation, including the increased use of EDI, online reporting, document and payment visibility, among other tools; enhance operations through tactical performance improvements and the application of metrics; and use business intelligence to aid in decision support and strategic planning and execution.

Along with its core freight audit and payment services, Cass offers trade finance solutions that help shippers better manage their working capital. Cass also provides expense payables solutions for utility, telecom, and waste invoice processing.

CT Logistics:

Delivering Robust Intelligence

As CT Logistics celebrates 98 years in business, it's evolving to continue meeting clients' needs today, while maintaining the quality, customized service for which it's known.

For instance, CT expanded its professional services staff to augment

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Realize cost reduction in auditing and payment costs including a comprehensive and systematic three-way contractual audit of more than 150+ data points across all modes globally down to the penny.



Secure Freight Payment

Intelligent Audit has an exclusive API carrier payment processing integration with TriumphPay, a product of Triumph Bancorp, Inc. (NASDAQ:TBK), to deliver streamlined payment processing.



Advanced Business Intelligence & Analytics

Intelligent Audit's intuitive proprietary platform ingests, cleanses, and normalizes transportation data producing actionable insights on every aspect of your transportation spend, including immediate access to more than 750 standard reports.



Expert & Proactive Account Management

Dedicated and strategic Intelligent Audit account advisers work hand-in-hand with your team.



Optimized Carrier Network Modeling

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clients' internal traffic departments. This move has been particularly valuable for organizations that have seen turnover among their more experienced employees. And to support clients' need for global supply chain management and visibility, the company maintains multiple offices and "boots on the ground" in foreign markets, says President Allan J. Miner.

No matter a company's size, CT offers products and services that can meet its supply chain management needs. Small to medium-sized clients can leverage CT's shipper co-op freight programs. Companies that join this group can access an array of vetted transportation service providers.

"The buying volume of the group means providers' rates for the program are substantially discounted," Miner says.

To meet the needs of its larger clients, CT has designed high-volume, e-commerce parcel and package processing programs that are completely automated and hands-off.

"This robust global package automation operates around the clock and across the globe, without intervention," Miner says. Moreover, it can work with customized websites, as well as client-specific accounting and general ledger modules.

CT Logistics' expanded business intelligence (BI) suite, QLIK, provides easier and faster access to data. While many BI solutions rely on query-based analysis, "this restricts users to a linear exploration within a partial view of their data," Miner says.

In contrast, CT's QLIK enables clients to easily obtain operational data, such as statistics and metrics, within its customized dashboard graphics.

Moreover, the associative engine behind QLIK lets clients combine any number of data sources, freely explore across them, and instantly pivot based on the results. "With CT QLIK, you can develop, extend, and embed visual analytics in your apps, portals, or anywhere," Miner says.

THE POWER OF LION

Another solution, the Logistics Intelligence Optimization Network (LION), determines the lowest prices for all of a client's shipping lanes, even with multiple modes, carriers, and/or legs. This is "a comprehensive freight management tool for determining the most efficient and least-cost shipping route for all shipments," Miner explains.

For shippers using parcel services, CTRAK® validates carrier contracts, independently measures each carrier's service, effectively and efficiently manages transportation spend, and automates freight payment, audit, and accounting processes. All shipments, including those made by third parties, are reviewed to ensure all discounts are received, Miner adds.

CTRAK® also checks all shipments for any address or account number corrections that are needed, the declared values, whether they're oversized, and more. Shipments also are audited for inside pickup or delivery, Saturday

pickup or delivery, and residential pickup or delivery.

Clients that work with CT Logistics typically save between 3% and 7% of their annual freight spend, Miner says. As one example, the company worked with a medical equipment supplier that lacked the insight it needed to identify the financial impact of a parcel carrier's price proposal.

CT Logistics analyzed a multi-round, three-year LTL and small parcel bid with an approximate annual spend of \$50 million, and identified savings opportunities based on, among other variables, hazmat and delivery area surcharges (DAS) and general rate increase (GRI) proposals.

The result? "More than \$2 million in savings over the term of the contract were tied directly to CT's impact analysis," Miner says.

CTSI-Global:

A Complete Logistics Ecosystem

Freight audit and payment has been at the core of CTSI-Global for more than 60 years, says Kristy Brown, vice president, freight payment operations. Shippers often turn to the Memphis, Tennessee-based firm to leverage both its technical solutions and its expertise, Brown says.

In its work with shippers of all sizes and across a range of industries, CTSI-Global leverages a mix of technology, such as Internet of Things (IoT) and RFID, to provide information shippers can use to optimize their routes, Brown notes.

CTSI-Global also recently launched, several months ahead of schedule, an invoice portal through which carriers can upload invoices that are reviewed and their data captured through key-from-image or via OCR (optical character recognition). This cuts processing time while increasing visibility.



THE LOGISTICS INTELLIGENCE OPTIMIZATION NETWORK (LION) IS "A COMPREHENSIVE FREIGHT MANAGEMENT TOOL FOR DETERMINING THE MOST EFFICIENT AND LEAST-COST SHIPPING ROUTE FOR ALL SHIPMENTS."

-ALLAN J. MINER
PRESIDENT
CT LOGISTICS



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FREIGHT BILL AUDIT & PAYMENT: Sparking Supply Chain Synapses

"It has been a game changer," she adds.

"Shippers also are looking for effective ways to manage and reroute loads," Brown says. For instance, when a Memphis bridge that spans the Mississippi River was shuttered for about six weeks due to a crack, shippers were forced to change how they were routing loads.

To accomplish this, shippers had to harness data that allowed them to review past trends, while also performing predictive analytics to assess the future.

"They needed to know, 'based on where I'm at today, what will happen in the future?'" she adds.

When a shipping client learned one of its carriers planned to significantly increase costs in its core transportation lanes, the experts at CTSI-Global modeled the company's historic activity to estimate the impact. It then designed a transportation network that both offset the price increases and reduced transit time.

ADDING A TMS TO THE MIX

By combining a freight bill audit and payment solution with a transportation management system like CTSI-Global's Honeybee TMS™, shippers gain a complete logistics ecosystem.

The Honeybee TMS™ system seamlessly connects data from multiple systems and transportation solution providers to develop effective, efficient transportation management solutions that enable shippers to optimize both inbound and outbound transportation.

Honeybee TMS™ encompasses processes from order management to load optimization, shipment execution,



"WE CAPTURE DATA THROUGH THE FREIGHT BILL AUDIT AND PAYMENT PROCESS, SO OUR SHIPPERS CAN IMPROVE THEIR INTERNAL PROCESSES, AND REDUCE THEIR FREIGHT COSTS."

-KRISTY BROWN
VICE PRESIDENT, FREIGHT PAYMENT OPERATIONS
CTSI-GLOBAL

and claims management, among other processes.

"We capture data through the freight bill audit and payment process, so our shippers can improve their internal processes, and reduce their freight costs," Brown says.

UNCOVERING \$3 MILLION IN SAVINGS

CTSI-Global worked with a medical device company that was entering sales orders throughout the day. Many of its shipments originated and ended at the same point, yet were shipped separately. By leveraging the power of Honeybee TMS™, the company was able to consolidate orders, cutting freight costs per pound by 26%. Annual savings totaled \$3 million.

CTSI-Global also provides myriad resources to help its clients cross-train and re-skill their employees so they can leverage their current workforces. Even with technology, "people still play a huge part" in supply chain operations, especially given how skilled labor is difficult to find, Brown notes.

Everyone on the management team at CTSI-Global brings at least 15 years of

experience to their roles, while its audit staff brings 400-plus years of experience with all transportation modes across the globe.

enVista: Technology, Process, and People

The team at enVista has "worked very hard to become a true business intelligence provider versus only a business information provider," says Michael Falls, director, global strategic solutions. The differences between the two start at the beginning, he notes.

Rather than begin an audit with carrier invoice detail, enVista prefers to use the executed shipment detail, whether from an order management, transportation management, warehouse management, or other system. The enVista solution matches this detail against the carrier billing detail.

"When the enVista solution is integrated across multiple systems, and not just the carrier billing detail, we gain an enriched audit and more robust business intelligence and visibility," Falls says. This also enables enVista to automate the general ledger coding and apply strong business rules.

myShipINFO, enVista's global freight audit and payment solution, can model shippers' rates, no matter how complex the freight agreements, ensuring complete audit compliance.

"EVERYONE IS TRYING TO WRAP THEIR ARMS AROUND THEIR DATA TO FIND WAYS TO MITIGATE THE IMPACT OF MARKET CONDITIONS."

-MICHAEL FALLS
DIRECTOR, GLOBAL STRATEGIC SOLUTIONS
enVISTA



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FREIGHT BILL AUDIT & PAYMENT:

Sparkling Supply Chain Synapses

To complement its technology, enVista pairs clients with senior-level transportation analysts. These experts offer business intelligence that helps clients maximize the value of the enVista freight audit and payment services they're receiving.

Over the past year, enVista introduced its Advanced Transportation Optimization and Management (ATOM) solution. Falls and his team had noticed that shippers typically engaged with multiple systems and partners as they strove to meet their transportation objectives.

"They were using one partner for contract sourcing, another for transportation management, something else for freight audit, and yet another for payment," Falls says. This often resulted in limited connectivity and visibility, as well as a lack of synergy.

ATOM addresses this by bringing together the components that cross these areas, including sourcing, transportation management and execution, and freight audit and pay. "It wraps all these in a layer of true business intelligence that offers actionable data," Falls says.

Companies can then leverage this intelligence to improve operations.

CUMULATIVE ADVANTAGES

The benefits of working with enVista tend to be cumulative, Falls says. Shippers who turn to enVista for small parcel audits typically save 1% to 2% of total parcel spend. Those who engage in non-small parcel or freight audits often achieve savings of 1% to 5% of their freight expense.

Organizations that leverage enVista's contract optimization solutions to boost their strategic sourcing currently see savings of 4% to 8%. Finally, when companies engage in business intelligence and analytics for cost optimization, many gain up to another 5% in savings.

"Total savings can run from 10% to 20% of total transportation spend when we engage as a holistic partner," Falls says.

This holistic approach is a shift from even the recent past, when the freight audit and payment function operated largely in a silo, Falls says. Today, it's recognized that freight audit and payment is part of a much larger transportation strategy puzzle, which, in turn, is key to network strategy.

enVista offers a unique ability to identify where freight audit and payment fits into an organization's broader transportation strategy and determine how it can be improved.

"With this insight, we can support the transportation strategy from the technology, process, and people perspectives," Falls says.

Fortigo:

Freight Audit Accuracy... Guaranteed

From its base in Austin, Texas, Fortigo's experts in logistics optimization, aided by its software solutions, help shippers optimize and audit their supply chain logistics decisions. As a result, they're able to cut costs, boost customer satisfaction, and drive profitability.

"We guarantee the accuracy of the freight audit process, an industry-first feature that our customers love," says George Kontoravdis, Ph.D., founder and president.

In particular, Fortigo's freight audit solution identifies and highlights the many reasons freight bills may be inaccurate. This includes shipments that were delivered after the date required by

service guarantee and without any valid delay reason; shipments lacking proof of delivery; and shipments that weren't picked up by the carrier, but that were charged for. The Fortigo solution can automatically transmit refund requests to the carrier.

Additionally, Fortigo is geography-agnostic. "We can manage freight bills across all geographies and any mode of transportation," Kontoravdis says. Once it has received customer funding, Fortigo can pay any carrier, with any currency, in any location.

PROVIDING CUSTOMIZED SOLUTIONS

Also important, Fortigo can tailor its freight audit process and turnaround time to specific client requirements. Most clients are multinational enterprises with in-depth and diverse needs.

Because Fortigo's freight audit and payment service is cloud-based and leverages a software-as-a-service (SaaS) delivery model, system deployment can occur in a matter of weeks. Customers can easily update freight rates as often as necessary.

What's more, shippers moving from a manual process to Fortigo's freight audit solution often see first-year savings of 7% to 10%. Established customers typically enjoy savings of 1% to 3%—and sometimes more—year over year. The amount often depends on the volume of shipping that occurs in a year.

Along with its freight audit and payment solution, Fortigo offers a web-based, one-stop transportation management system (TMS) that can manage any type of shipment, is



"WE GUARANTEE THE ACCURACY OF THE FREIGHT AUDIT PROCESS, AN INDUSTRY-FIRST FEATURE THAT OUR CUSTOMERS LOVE."

**-GEORGE KONTORAVDIS, PH.D.
FOUNDER AND PRESIDENT
FORTIGO**

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FREIGHT BILL AUDIT & PAYMENT:

Sparkling Supply Chain Synapses

carrier-neutral, and offers one system of record for logistics across multiple sites. “This allows for a closed-loop system that empowers Fortigo to identify compliance anomalies with vendors, saving money and time for our customers,” Kontoravdis says.

Before the pandemic, Fortigo’s goal was to speed up turnaround times and set the industry standard for invoice cycles, Kontoravdis says. This would provide customers more real-time visibility to their expenses.

While speed remains essential, “with the pandemic, the bottom line was to save customers money and ensure that operations could continue during the challenging times we faced,” Kontoravdis says. “No matter how long it took, savings had to be found.”

For example, as the COVID-19 pandemic hit, airlines across the globe were forced to quickly respond to diminished demand in all aspects of their businesses. They urgently needed time-sensitive execution strategy changes.

“Fortigo’s streamlined, all-in-one, SaaS delivery model allowed our airline customers to rework and re-optimize overnight all their supported supply chain channels and make necessary changes hourly,” Kontoravdis says.

This empowered front-line workers to continue executing shipments, using the regularly updated company strategy, and through the continued re-optimization model, ensuring hard-dollar savings.

Intelligent Audit:

Empowering Shippers to Make Smart Decisions

“We’ve always been a technology company and we’re proud of our heritage,” says CEO Hannah Testani.

Through its technology platform, Intelligent Audit serves a cross-section of shippers, from those in the Fortune



“THE ONLY WAY TO UNDERSTAND THE FINANCIAL IMPACT OF THE TRANSPORTATION STRATEGY, AS WELL AS ITS EFFECT ON SERVICE, IS TO HAVE A PLATFORM WHERE YOU CAN HAVE ALL THIS INFORMATION IN ONE LOCATION.”

—HANNAH TESTANI
CHIEF EXECUTIVE OFFICER
INTELLIGENT AUDIT

50, many of whom move well over 100 million shipments each year, to numerous small and mid-sized customers, across all industries.

No matter the size or type of company, all need to make sure their shipment and transport methods make sense for their operations.

“They need to be able to answer the tough questions: What is the actual cost? What is my landed cost per shipment? Am I earning a profit when delivering every one of those SKUs?” Testani says. If not, shippers need to quickly adjust their operations.

To help customers optimize these decisions, Intelligent Audit starts by normalizing and cleansing customers’ data. “Without clean data, you can’t make smart decisions,” Testani says.

And given the volume of data with which Intelligent Audit has worked, it has developed robust methods for normalizing, cleansing, and visualizing it. “From there, our mission is to empower shippers to become smarter and more efficient,” Testani says.

ROBUST DATA PLATFORM

Intelligent Audit proactively leverages both technology and human experts to identify savings across all modes. “The only way to understand the financial impact of the transportation strategy, as well as its effect on service, is to have a platform where you can have all this information in one location,” Testani says.

Intelligent Audit provides that platform, capturing all data across all systems. For instance, if a shipper has five TMS providers, Intelligent Audit will capture the information from each, she adds.

This all-encompassing view provides a unique vantage point and the ability to alert shippers as disruptions occur, so they can fix them before they escalate. Intelligent Audit then leverages deep-learning models to understand its customers’ transportation networks and quickly alert them to anomalies.

COLLABORATING WITH CARRIERS

Along with shippers, Intelligent Audit collaborates closely with carriers. “We believe it’s our responsibility to get carriers paid on time,” Testani says. That’s especially true in today’s market, where a missed payment can jeopardize the relationship between a shipper and carrier.

Over the past few years, several bankruptcies in the freight bill audit and payment space, in which some companies lost millions of dollars, have prompted a flight to safety, Testani says. To ensure that safety, Intelligent Audit partners with TriumphPay, a subsidiary of a publicly traded bank and provider of supply chain financing.

As important, Intelligent Audit has always owned its business intelligence product. “We’re able to control our destiny and be very nimble with how we can deliver solutions to our customers,” Testani notes.



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Several years ago, Intelligent Audit worked with a major pet retailer to implement an omnichannel strategy that leveraged both its distribution centers and brick-and-mortar stores to fill orders.

By using data from Intelligent Audit's analytics platform and proprietary algorithms, the company was able to analyze its entire network, maximize the productivity of its existing infrastructure, identify the top ZIP codes in which to add warehouses, and pursue opportunities for less-expensive ground shipments that still met service level requirements.

When COVID hit and e-commerce orders spiked, the company had its omnichannel infrastructure in place. "They could be extremely nimble and not have to scramble," Testani says.

nVision Global Technology Solutions, Inc.: Optimizing Supply Chains Around the World

To meet the freight bill and audit needs of clients scattered across the globe, nVision Global, based in Atlanta, Georgia, owns and operates seven strategically placed, full-service processing centers that span three continents, says Keith Snavelly, senior vice president, global sales.

nVision's sales, implementation, and customer service staffs are fluent in more than 22 languages. "They can provide regional expertise and customer service in the local languages and time zones in which they operate," he adds.

Most of nVision's clients are multinational corporations seeking a single provider that can process, rate, and audit general ledger account codes across all modes of transportation-related invoices across the globe, and can remit payment, again globally, for all modes of transportation.

They're also looking for a single, global data warehouse and the analytical tools that will help them streamline and optimize their global supply chain, Snavelly says. nVision provides this.

"THE FBAP INDUSTRY CONTINUES TO THRIVE BY PROVIDING CRITICAL DATA AND ANALYTICAL TOOLS THAT HELP SHIPPERS OPTIMIZE THEIR GLOBAL SUPPLY CHAIN, WHILE PROVIDING AUDIT SAVINGS, AS WELL AS LOWERING THE INTERNAL COSTS OF PROCESSING THEIR INVOICES IN-HOUSE."

-KEITH SNAVELLY
SENIOR VICE PRESIDENT, GLOBAL SALES
nVISION GLOBAL

The second-generation analytics tool, nSight Supply Chain Analytics, features hundreds of key performance indicators (KPIs) with thousands of advanced visualizations, stellar "drill-down" capabilities, and unlimited filtering options, Snavelly says. Its user-friendly format allows shippers to easily highlight trends, exceptions, and anomalies, and then leverage this information to streamline and optimize their global supply chains.

The supply chain services division of nVision Global offers a range of transportation management software and services, including its cloud-based Impact TMS, which provides visibility and management of global shipments from creation through delivery. Other applications include rate negotiations, a reverse auction tool, benchmark analysis studies, and rating and routing applications.

EMPOWERING A TECHNOLOGY COMPANY

nVision worked with a technology company that was having difficulty accessing its international freight payment data, which covered customers in 100-plus countries, as well as multiple currencies and cultures.

The lack of information hindered the company's ability to control supply chain costs and made it difficult to pre-audit the freight bills, leading to concerns that the freight charges paid were not always the correct ones. Finally, the application of general ledger codes to freight invoices had to be completed manually.

Through the application of nVision functionality to build a database, the company now can verify and manage its supply chain costs and operations. Bills are audited and shipment planning and transportation provider selection have been enhanced.

BEST PRACTICES IN PAYMENT MANAGEMENT

Cash flow improved because the company has been able to employ best practices in managing payment terms with its transportation providers. Providers are paid on time, reducing late payment fees or additional interest expense charges, as well as the frequency with which transportation providers hold freight due to non-payment of invoices, potentially disrupting supply chain networks. Access to detailed supply chain data has enhanced decision-making.

nVision's Online Freight Bill Resolution tool also cut invoice approval time. Invoices needing approval are automatically routed to the appropriate personnel using pre-defined business rules, eliminating the previous manual processes of scanning, emailing, or faxing invoices for approval.

nVision Global customers routinely save between 6% and 12% of their annual transportation spend, plus an additional 1% to 2% by reducing duplicate invoices, Snavelly says. These savings are on top of those realized by outsourcing the transportation payment function, and from using nVision's analytics tools.



Freight Bill Audit & Payment

TMS & 3PL
Managed Freight
Negotiation Services
Global Audit & Payment
BI & Analytics
Benchmarking
Consulting

FBAP



FREIGHT BILL AUDIT & PAYMENT: Sparkling Supply Chain Synapses

RateLinx:

More Than Audit: Better Data for Better Results

“We’re a data-first company leveraging technology,” says Nate Endicott, senior vice president of global sales, marketing, and partnerships.

The company’s PayLinx solution is a global, real-time, freight audit and spend intelligence platform driven by artificial intelligence and the industry’s first data quality engine. PayLinx processes more than 20 million transactions and \$237 million plus in transportation spend per day.

The PayLinx solution automates shippers’ freight audit and spending processes and aggregates their total transportation spend so they can slice and dice it as needed.

“RateLinx can quickly connect to and integrate data from multiple sources,” says Andrew Hooser, vice president of customer solutions. “It then can use this information to derive insights that help companies become a shipper of choice and gain a competitive advantage.”



In addition to verifying freight bills for accuracy, freight bill payment and audit providers analyze data to help companies make smart transportation decisions.

“BY MONITORING CLIENTS’ DATA, RATELINX CAN ALERT SHIPPERS WHEN THEY’RE USING A CARRIER THAT’S MORE EXPENSIVE THAN NECESSARY, AND IDENTIFY MORE ECONOMICAL OPTIONS.”

-ANDREW HOOSER
VICE PRESIDENT, CUSTOMER SOLUTIONS
RATELINX

RateLinx provides Prescriptive InsightsSM—easy-to-understand actions shippers can take to optimize their transportation spend.

“For instance, by monitoring clients’ data, RateLinx can alert shippers when they’re using a carrier that’s more expensive than necessary, and identify more economical options,” Hooser says. “We look at all their rate agreements and proactively advise clients of changes that would benefit their networks.”

TECHNOLOGY & COLLABORATION DRIVE SAVINGS OPPORTUNITIES

The transportation optimization and modeling engine helps shippers model “what-if” scenarios. “It provides a competitive advantage, offering quality, timely, and accurate data, and alerting

shippers to opportunities for savings,” Endicott says.

The artificial intelligence and machine learning engines in RateLinx’s data quality solutions are tested and proven. “They’re 20 years old; basically, already in college where others are only in grade school,” he adds.

This solution also can reduce manual processing by automating general ledger coding and cost-allocating freight transactions.

Shippers that utilize RateLinx’s TMS in conjunction with PayLinx are able to capture their transportation costs more accurately and completely than companies that lack an automated freight engine, Hooser notes.

This is key, given how rapidly prices are changing. With the ability to capture those changes in real time, shippers can better analyze them and then act to optimize them. RateLinx can work with just about any file format, which cuts the time required to onboard both shippers and carriers.

As important, shippers can ensure their carriers are paid in a timely manner. “In the current scenario, carriers have choices in terms of who they handle,” Hooser notes. “Time-to-pay is a very important element as carriers decide with whom they’ll work.”

“RateLinx’s data quality team also works with carriers to help them resolve any data gaps or invoice billing issues,” Endicott says. “As a result, before the data even arrives at a customer, it’s telling the correct story. Shippers don’t have to spend time figuring out whether the information is accurate, and instead can focus on managing their businesses.”

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U.S. Bank Corporate Payment Systems:

A Focus on Technology, Security, Reliability

U.S. Bank's Corporate Payment Systems is leading in its response to three rapidly evolving trends impacting freight audit and payment services, says Jeff Pape, senior vice president product & marketing, transportation.

The first is digitization, with companies demanding more digital DIY capabilities, such as streamlined processes, and human and artificial intelligence-driven insights, among

others. The second is the continued rise of e-commerce. As companies prioritize their response to that demand, their supply chains are impacted, Pape notes.

The last is the increasing importance of data analytics and technology. Just as important as the need to decipher what happened is "the need for predictive analytics for the future, and 'what-if' scenarios," Pape says, noting these activities will play significant roles as companies look to align distribution centers more closely with their customers.

"As a bank in the freight audit and payment space, we place a significant

focus on technology, security, and reliability, and delivering solutions that meet these evolving needs," Pape says.

For instance, U.S. Bank is highly engaged and focusing on dashboards and DIY capabilities.

UNRIVALED DATA SECURITY

The increasing number of stories about ransomware attacks make it critical that shippers consider reliability and data security when choosing a freight bill audit and payment provider. "U.S. Bank's goal is to ensure that our customers experience unrivaled data security that only a bank can provide," Pape says.

When to Consider a FBAP Provider

When does it make sense for a growing firm to consider a freight bill audit and payment provider? The right time varies by firm.

While many assume that only larger firms need FBAP solutions, smaller firms can benefit. Depending on the industry, logistics can represent about 10% of the overall cost structure of a company—for many, a significant expense, notes George Kontoravdis, founder and president of Fortigo. Smaller companies may benefit from a streamlined solution, while larger enterprises operating across different geographies, and using multiple carriers and transportation modes, will probably need a more comprehensive system.

These questions can help assess if your company can benefit from working with a FBAP provider:

- 1]** Do your internal costs to process and audit freight bills exceed outsourcing costs? Include employee costs as well as the infrastructure costs required to handle these functions, says Kristy Brown of CTIS-Global. Also look for a provider with a global footprint to support supply chain operations across the world.
- 2]** Are you looking to expand and/or centralize your freight bill operations footprint? Working with a partner provider can help merge decentralized processes or expand a freight bill function to new regions, Brown notes.
- 3]** How often and quickly does your organization need to change its transportation tactics while understanding the financial and customer impact? For instance, when a parcel carrier issues peak season fees, do you need to know the impact and how your firm will adapt? The calculations often become complex and involve trade-offs, says Hannah Testani, CEO of Intelligent Audit. Say peak season fees apply only after 40,000 shipments. Will moving shipments to another carrier to remain under that threshold erase any volume discounts?
- 4]** How important is transportation data in helping the company gain a competitive advantage? As organizations increase the number and range of their transportation modes and pricing agreements, they need data, analytics, and prescriptive insights to guide decisions.



FREIGHT BILL AUDIT & PAYMENT: Sparking Supply Chain Synapses

To that end, shippers with U.S. Bank enjoy the security of a world-class, Tier-IV data center. It hosts mission-critical servers and systems in a reliable, fault-tolerant, and secure environment.

As important, U.S. Bank employs segregated builds to prevent co-mingling of customer data and safeguards sensitive supply chain data to protect partners and suppliers from cybercrime.

"As a federally regulated financial institution, the audit and compliance requirements to which we are accountable are rigorous and far superior to those of unregulated, non-bank competitors," Pape says.

These features can benefit even shippers with lower volumes. For instance, shippers that work with small parcel invoices often need to process and analyze a great deal of individual

package detail. "We work with companies with as little as \$1 million in small parcel spend, and they can see the benefits," Pape says.

At the same time, U.S. Bank's services can benefit larger firms. Pape and his team helped one global retailer recover more than 1,000 fraudulent shipments of high-value packages. A bank team moved on-site in less

than 24 hours to implement delivery intercept and re-routing rules for each shipment. It then helped them incorporate process safeguards to prevent future fraud.

"The supply chain is a critical and strategic component to a company's success," Pape says. "Ensuring freight is properly moved, recorded, and paid for warrants attention." ■



"AS A BANK IN THE FREIGHT AUDIT AND PAYMENT SPACE, WE PLACE A SIGNIFICANT FOCUS ON TECHNOLOGY, SECURITY, AND RELIABILITY, AND DELIVERING SOLUTIONS THAT MEET EVOLVING NEEDS."

-JEFF PAPE
SENIOR VICE PRESIDENT, PRODUCT & MARKETING, TRANSPORTATION
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9 WMS Must-Haves

When shopping for a warehouse management system, one size doesn't fit all. To narrow your search, look for solutions with these must-have features to meet your current and future business demands.

By Gary Wollenhaupt

Disruption from the pandemic laid bare the shortcomings of some warehouse and distribution operations still relying on outdated, inadequate systems. As buyers flooded e-commerce sites with orders, and shippers struggled with trucking capacity, outdated or ad hoc systems couldn't keep pace.

A modern warehouse management system (WMS) can help shippers tame the turmoil by digitally managing inventory and shipping processes. WMS offerings have boomed in the past few years, so shippers can choose from a range of solutions.

Some solutions are targeted at e-commerce companies and some are suited for middle-tier companies, while others are positioned for the largest companies with the resources to make it work. But a sophisticated, scalable WMS can be affordable for a smaller company that starts with basic functionality and adds capabilities as the business grows.

Technology advances such as cloud computing and software, and infrastructure as a service, mean companies don't have to invest in expensive computer hardware—like an IBM AS/400—as they may have done in the past. Now users can access a WMS from practically any computer or mobile device.

"There are many more systems today that are affordable for mid-market

companies," says Amit Levy, executive vice president of customer solutions and strategy at Made4net, a supply chain software developer based in New Jersey.

When should a company consider implementing a WMS or upgrading a current system? When inventory accuracy starts falling into the 70-80% range, and labor costs rise because of the need for manual counting.

"Companies that may have started small by managing inventory on paper or in spreadsheets, but now are not able to reconcile inventory with their enterprise resource planning (ERP) system, know they need help," notes Raj Patel, senior director, 3PL global industry strategy, at software company Blue Yonder.

One size doesn't fit all, so understand what your supply chain needs and what it doesn't. A company can invest in a WMS directly or adopt a system through a third-party logistics provider relationship. If you're considering a WMS for your operations, consider these must-haves to meet current and future needs.

1. ARCHITECTURE

Look for a system that supports flexibility and scalability to adapt to business requirements and new technology. Ideally, end users can manage shipping methods, products, locations, and other aspects without going back to the provider for additional programming.

The WMS also should support seasonality, high volumes, and temporary employees using the system.

"You don't want to spend the money and then not be able to use the WMS in 5 to 10 years because your business has outgrown it," Levy says.

2. FUNCTIONALITY

Critical functions depend on the volume of the operation and complexity of products—frozen foods or oversize home goods, for example, require a different solution than fast fashion or electronics.

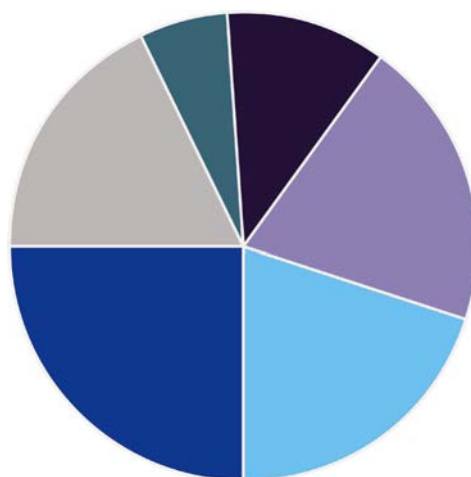
In any case, a WMS will optimize day-to-day warehouse operations and provide a higher level of efficiency to satisfy customers and the bottom line.

Any WMS should offer a few table stakes functions. The extra bells and whistles, like business intelligence analytics and labor management, are available for those companies that need them and can afford them.

Even the most basic WMS should provide product receiving, put-away, and order allocation, which offer

GLOBAL WMS MARKET SHARE, BY APPLICATION, 2020 (%)

Transportation and logistics is expected to emerge as the fastest-growing WMS application segment from 2021 to 2028. The growth can be attributed to the increased popularity of e-commerce portals, coupled with growing disposable income levels of consumers, especially in emerging nations such as India and China.



Source: Grand View Research

real-time inventory visibility. Picking, packing, and shipping, including building and printing shipping documents and labels, are also necessary in most cases.

Some systems support dynamic slotting so fast-selling products can be placed in the right bin or rack to shave a few seconds off each pick.

Some users need additional capabilities, such as serial number or lot tracking from receiving through shipping, or bill of material breaking and kitting.

“All WMS providers offer 80% of the same functions; it’s the 20% that’s unique to you that makes the difference,” Patel says.

3. EASE OF USE

Given the ongoing competition for labor, a WMS should be easy for new users to learn and be able to add temporary users on the fly to handle seasonal surges.

“With people changing jobs, and onboarding new resources, ask potential WMS vendors how quickly users can learn the system,” Patel says. “You don’t want to train people for days.”

4. INTEGRATION

It’s critical for a WMS to work and play well with others. It should connect easily to an ERP, transportation management system, order management system, and warehouse execution system. As more



facilities install automatic storage and retrieval systems and robotics from multiple vendors, ease of integration could be a deal-breaker.

“Having a solution you can integrate with is critical,” says Michael Roberts, chief information officer at ODW Logistics, a Columbus, Ohio-based 3PL.

5. SCALABILITY

WMS requirements depend on the size and complexity of the organization now and the growth potential for the future.

Lower-cost software-as-a-service systems may suffice for a straightforward distribution network, but they may not provide the analytics and business intelligence to help take a company to the next level.

“If you are comfortable living within the constraints of ‘this is what you get and this is how it works’, that can be a cost-effective way to get into a WMS,” Roberts says.

A small retailer may not need sophisticated functionalities initially, but it should adopt a WMS that will scale with the business. A retailer may serve e-commerce and its own stores now but could expand to serve other distributor and retail partners as well as other e-commerce channels. The order profile may vary from delivering a single item to a consumer to sending pallet loads to distribution centers.

“As a company grows, it can start with the base level and upgrade with higher functionality,” Patel says.

6. LABOR MANAGEMENT & PLANNING

The WMS should identify the best path for workers to find the correct inventory to pick eaches or boxes. Add a gamification element by communicating workers’ productivity.

An intelligent labor management system will provide industry guidelines for productivity. For example, a worker should be able to pick a certain amount of product in one hour, depending on product size and picking methodology.

In some of its warehouses, 3PL Kenco Logistics uses gamification that compares employee performance

WMS NICE TO HAVES

Depending on your supply chain needs, consider some optional add-ons that are a part of a robust warehouse management solution.

- Serial number and lot tracking
- Cycle counting
- Stock locator
- Global expansion – multiple languages, currencies, etc.
- Dynamic slotting
- Workforce management and safety
- Support multiple companies in a single location
- Business intelligence

against the standards set for each warehouse. “It gives workers direct feedback in the moment if they’re running ahead or running behind,” says Kristi Montgomery, vice president of innovation.

Some companies may offer labor management as a standalone module that could be used with any WMS. Some systems will also match an employee’s skills or qualifications to the job. For example, if an injured employee is restricted to light-duty tasks, the system will assign them to appropriate duties.

7 COMFORT LEVEL

While there are many WMS providers, even those in the business say there aren’t significant differences among them. Work with a provider that offers a comfort level with your corporate culture and provides the functionality your company requires.



PHOTO: BLUE YONDER

Many WMS solutions offer labor management functionality to optimize worker productivity.

“You may pay more to go with a reputable provider, but they have the depth and breadth of technology experience, and a broad customer base, so they will be around longer,” Levy says.

8 DIGITIZATION

It’s amazing how much paper some companies still use, Roberts notes. A WMS helps digitize operations with electronic bills of lading and signatures. That makes carriers more efficient during gate checks at the facility and provides contactless services. Digital processes also support real-time business intelligence and analytics.

9 FUTURE TECHNOLOGY

Autonomous vehicles, drones, automated pallet building and shrink wrapping, and other intelligent systems will play a more significant role as labor costs rise. If your organization plans to adopt emerging technologies, look for a WMS that makes it easy.

“The labor savings can be huge, and you can focus your resources on adding value,” Roberts says. ■



Refrigeration and heating company Sid Harvey's implemented a WMS to gain warehouse efficiency, accuracy, and visibility.

SID HARVEY'S HAS WMS FUNCTIONALITY DOWN COLD

Sid Harvey's, a manufacturer and distributor of refrigeration, air conditioning, and heating products, chose the Made4net WMS to replace a system installed in 1997. Sid Harvey's operates a network of 80 branches and supplies more than 50,000 SKUs from its Wilkes Barre, Pennsylvania, warehouse.

Dave Hartz, general manager at Sid Harvey's, and his team searched for a WMS provider for 14 months before selecting Made4net. One of the deciding factors was the system's ability to support not only store replenishment but also the customized inventory system that stocks components for HVAC service techs, similar to e-commerce fulfillment for small, individual shipments.

With the WMS, Sid Harvey's has systemic inventory visibility from vendor to store.

“Traceability is the biggest thing for us; we know where product is from the time it hits the dock until it's on a truck leaving the facility,” Hartz says.

The warehouse handles everything from nuts and bolts to 500-pound boiler furnaces, which are stored in designated warehouse regions. As outbound shipments are built, inventory is updated in real time.

As the warehouse staff becomes familiar with the WMS, Hartz plans to use its other modules, such as the labor management and slotting functions.



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