

DESCARTES™ MacroPoint

REAL-TIME FREIGHT VISIBILITY TRACKING:
**KEYS TO A SUCCESSFUL
IMPLEMENTATION**



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Assessing Your Visibility Program

User Access and Adoption

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Exception Management

Intelligence, Reporting & Analytics

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Real-time Freight Visibility Tracking: Keys to a Successful Implementation

This ebook is designed to help companies that are planning to invest in or have purchased a visibility tool:

- **Evaluate their visibility program**
- **Understand and define implementation best practices**
- **Identify risks and opportunities for improvement**

▶ OVERVIEW

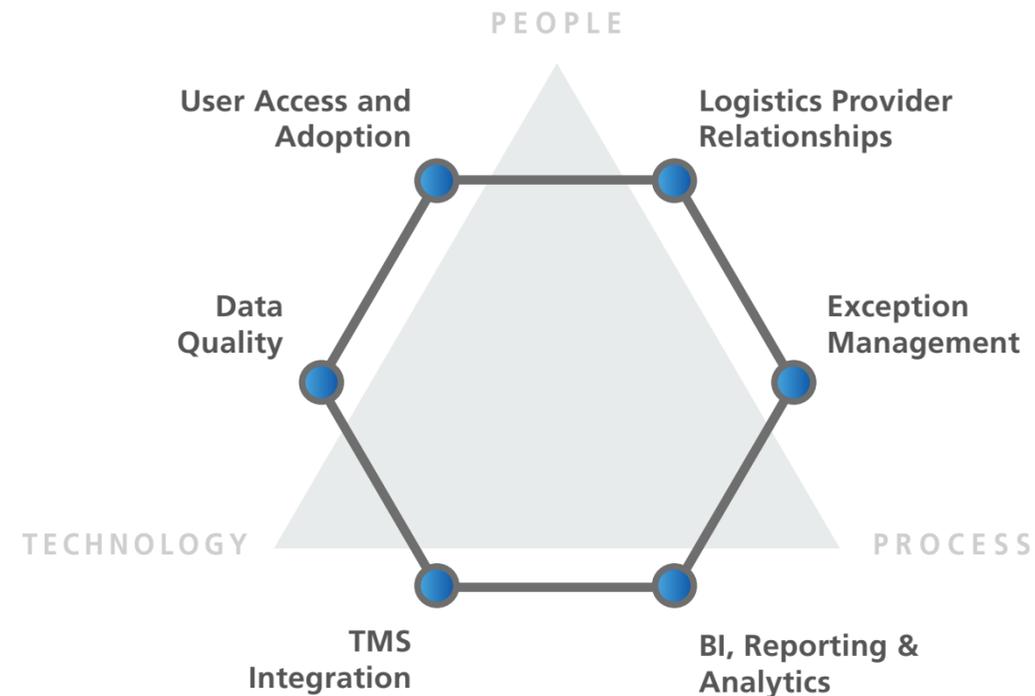
While industry leaders have embraced real-time capabilities of freight visibility to improve their performance, visibility functionality is still very new to many companies.

To realize the maximum value from their investment, organizations need help understanding the best practices for implementing a visibility solution. For example, having a strategy to encourage adoption of the new solution is imperative to ensure success. Expecting the organization to immediately rally around the solution without first explaining its future benefits is a guaranteed way to limit its potential return on investment (ROI).

It's also important to have monitoring procedures that can identify potential risks within a program and opportunities for ongoing improvement. A classic "Golden Triangle" approach that uses People, Process and Technology variables is one effective way to evaluate visibility solution implementation. Each of the variables is codependent on all of the others and enhancing one area will usually result in an improvement in others.

▶ DEFINING BEST PRACTICES

Below you'll find a description of six interdependent variables that contribute to a successful implementation, along with examples of key indicators associated with companies operating at various performance levels. The KPIs and measurements used to define each category are based on observations of implementation practices employed by companies using Descartes MacroPoint™ visibility functionality.



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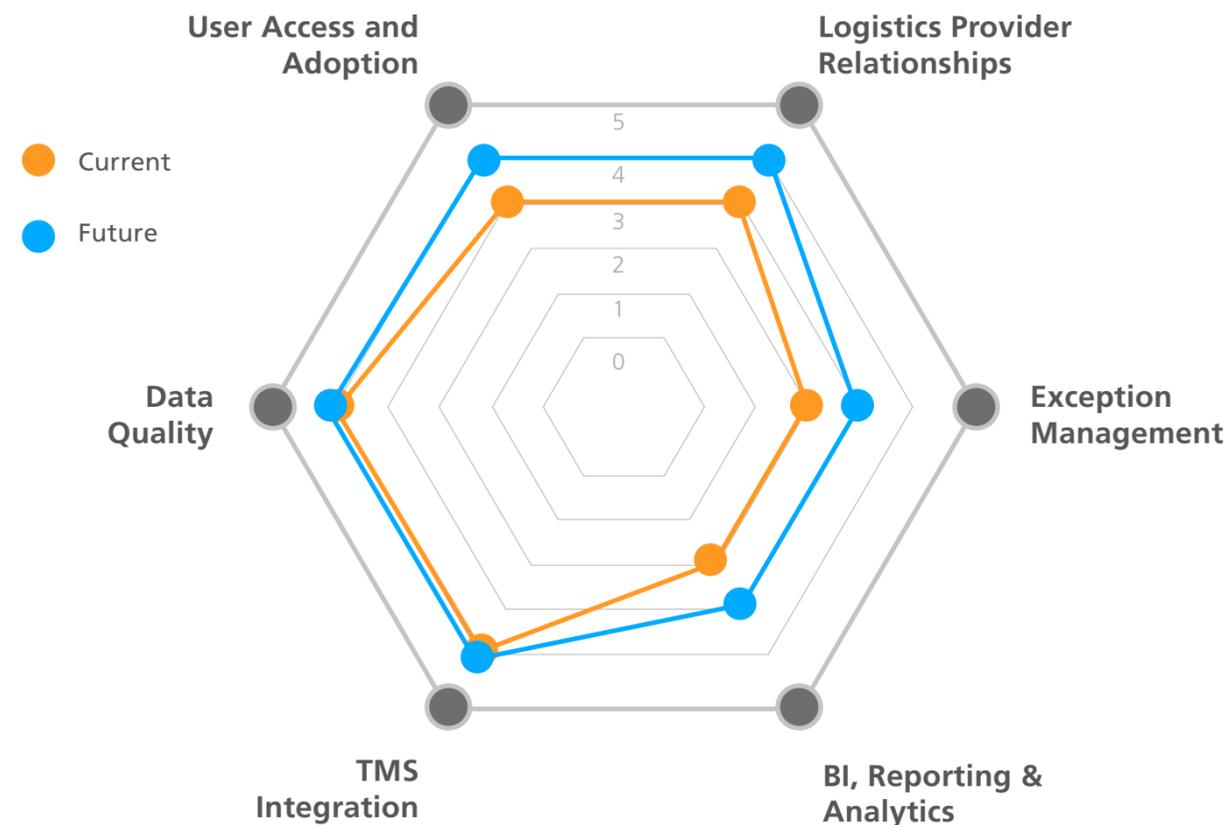


Assessing Your Visibility Program

Is your program operating at peak performance or are there areas that could be improved? The chart below provides an opportunity to score your company's implementation practices based on the Golden Triangle variables defined for supply chain visibility. There are a total of six categories – two each for People, Process and Technology – with a maximum score of 30 possible. Each category is graded on the following scale:

- ▶ **5 = TOP PERFORMER**
- ▶ **4 = ABOVE AVERAGE**
- ▶ **3 = MIDDLE OF THE ROAD**
- ▶ **2 = BELOW AVERAGE**
- ▶ **1 = BOTTOM PERFORMER**

By plotting scores in a chart, you can see the big picture, allowing immediate focus on areas that need improvement without diminishing the importance of successful areas. In the customer example below, it's apparent that the Integration and Data Quality are good, but improvement is needed in Exception Management and Business Intelligence. By improving those values, the company also improved its Logistics Provider Relationships.



This self-actualization exercise enables a continuous improvement cycle to identify areas of opportunity. To ensure ongoing success, regular checkpoints should be established to review and re-evaluate your visibility program based on the variables. This is also an opportunity to adjust your KPIs based on any changes or improvements you've experienced.

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People: User Access & Adoption

Know where data can be accessed, who has access to that data and what data is available

TOP PERFORMERS

- Recognize access to shipment information is important to multiple groups using multiple systems – not just transportation and logistics management
- Visibility is provided to external stakeholders including customer service, merchandisers, retail stores, downstream production and warehouse facilities and the final customer
- Shipment visibility data is available within systems used by all user groups such as TMS, WMS, ERP, sales, business intelligence reporting and customer-facing portals
- Greater than 80% of all potential users have access to freight visibility data within the various enterprise systems
- Executive leadership is engaged and has defined the vision and importance of the visibility program to all stakeholders – transportation/logistics users, IT, sales, carrier procurement and customer service

ABOVE AVERAGE

- Understand visibility is important to multiple users, but the roll out of data access to all internal and external systems is not yet fully achieved; often limited to executives and transportation groups
- High degree of executive engagement and communication from the top about the importance of visibility
- Success stories used to drive home the message that data is impactful to various groups
- All transportation operations and executive team users have access to visibility data on all shipments via reporting, embedded within the TMS and via a control tower

MIDDLE OF THE ROAD

- All transportation operations users have access to visibility data natively in the TMS, via a control tower and from notification emails; however not all shipments have visibility and users do not have full access to all data
- Visibility initiative launched primarily as a transportation/ logistics-specific program, but not prioritized as an improvement program across the enterprise
- Less engagement from the executive team, which often results in bottleneck of access, with users in warehouse, sales or customer service relying on ad-hoc requests to transportation for visibility information, unless they have access to the TMS

BELOW AVERAGE

- Only users with a track and trace responsibility have visibility to data
- Some data accessed in the TMS and other data accessed in visibility platform website

BOTTOM PERFORMERS

- Less than 20% of users have access to the visibility platform or data provided by the platform
- The website portal is the only method that visibility data updates is accessed by users
- Not using control tower

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People: Logistics Provider Relationships

Visibility can only be gained with the participation of the carriers, the owners and creators of the data. Make sure they understand the importance of the value they provide and benefit from and are willing to make appropriate investments and changes to ensure quality data



TOP PERFORMERS

- Strong carrier relationships across both business and IT dimensions to ensure access to as much quality data as possible
- Diverse carrier base with a mix of cell phone, GPS/ELD and TMS-connected carriers
- Recognize the importance of a two-way relationship with carriers
- Carriers engaged in ongoing reviews of compliance metrics and with continuous improvement efforts
- Focus on having all available ELD/ TMS carriers directly connected to its visibility platform network and commitment to automate the visibility process as much as possible
- Are highly engaged with the carriers throughout the onboarding process
- Clearly communicate visibility expectations and data requirements to the carriers



ABOVE AVERAGE

- 85% of carriers partnered for stronger business relationships
- Carriers are proving visibility data on between 50% and 75% of shipments
- Dedicated person or team committed to carrier onboarding process and communication efforts



MIDDLE OF THE ROAD

- 25 - 50% of carriers partnered, but no active relationship with carrier and low compliance ~ 25%
- No structured programs with individual carriers to improve tracking performance
- Steep decline in top-level executives engaged directly with the carriers and visibility provider



BELOW AVERAGE

- A few carrier partners with low compliance- ~25%
- Majority of loads tracked via cell
- Carriers with available ELD data still tracked via cell – but poor compliance



BOTTOM PERFORMERS

- No carrier partners
- Only cell phone tracking
- Users unaware of process for a driver to opt-in via text message
- Aware of visibility tool to provide tracking, but usage is occasional and inconsistent

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Process: Exception Management

Exception management, proactive alerts and informed decision making help prevent customer service failures



TOP PERFORMERS

- Daily notifications for exception management
- Notifications shared and targeted to multiple user groups (i.e. customer service, customers, warehouse operations, sales, etc.)
- Data provided to carriers proactively, so they can react and update customers to in-transit issues
- Stop updates on > 75% of loads
- Inbound ETA data integrated into TMS, WMS and ERP systems
- Outbound ETA data integrated into customer and retail portals



ABOVE AVERAGE

- Widespread effective use of targeted internal / external notifications
- Processes set up around what action to take based on exception types



MIDDLE OF THE ROAD

- Limited use of targeted internal/ external notifications
- Processes set up around what action to take based on exception types



BELOW AVERAGE

- Effective track and trace, but no proactive exception management
- Exception emails are sent to a group distribution list making it difficult for an individual to take action



BOTTOM PERFORMERS

- Limited track and trace
- Learn about delayed/late shipments too late to alert customers, causing frequent customer complaints
- Don't use internal emails, configure/use schedule alerts or proactively use data externally

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Process: Business Intelligence, Reporting & Analytics

Capturing internal data and reporting performance metrics enables predictive analytics that can identify business trends and drive continuous process improvements



TOP PERFORMERS

- Visibility data incorporated in business intelligence reporting dashboards, enabling transparency to trends
- Reporting included in management meetings and made available across multiple groups
- Common business intelligence metrics include performance by lane, carrier and business unit, average stop per detention location, etc.
- Carriers have visibility to their own metrics and are involved in conversations around continuous improvement



ABOVE AVERAGE

- No business intelligence dashboards used
- Operations and executives utilize regularly scheduled reports to evaluate and discuss carrier use



MIDDLE OF THE ROAD

- No executive visibility of carrier compliance or other tracking success metrics
- Data is siloed in transportation operations
- Carriers do not have visibility to how they are being measured



BELOW AVERAGE

- Reports are available and sent to individual users, but data isn't used



BOTTOM PERFORMERS

- No reporting used

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Technology: Breadth and Depth of TMS Integration

Integration with a TMS can expand shipment visibility beyond basic, brokered freight management to include real-time tracking data across a much broader range of service providers and vehicle drivers



TOP PERFORMERS

- Often develop their own integration to a visibility platform using a web services API; the flexibility to implement the data flows that best match internal workflow allows the best user experience
- More than 80% of shipments are tracked with the capability to track specific lanes, carriers, modes, business units, etc.
- All visibility data provided directly back into their own TMS, WMS, ERP and reporting systems is consumed and made available to locations where users need it
- Integration uses business rules that add specific targeted internal and external email addresses on each order to receive exception alerts
- Ability to provide external customer web portals is leveraged to share visibility



ABOVE AVERAGE

- API, Bulk Load CSV or commercial TMS integration
- Flags on customers and carriers for automated tracking
- > 50% of loads tracked automatically
- Low % of ad-hoc tracking
- Automated tracking per individual customer / carrier



MIDDLE OF THE ROAD

- API or CSV integration, but only tracking individual loads ad-hoc
- Location data and event updates are pushed into TMS



BELOW AVERAGE

- Hyperlink redirect to visibility provider's website
- No data is consumed back into the TMS
- All data is consumed by the user in the provider's website



BOTTOM PERFORMERS

- No integration to automate load creation
- All loads created with a shared login
- No consistent entry of stops or appointments

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Technology: Data Quality

Accurate, robust and actionable data throughout the entire network enables companies to make informed business decisions that can provide a competitive advantage



TOP PERFORMERS

- Carrier codes, stops and planned appointment windows supplied on 100% of loads
- Load Type, Mode and other shipment metadata values provided on loads for advanced searching
- Invalid tracking numbers on < 5% of shipments
- Real-time shipment data in the visibility tool mirrors data in the TMS
- TMS up-to-date in real time



ABOVE AVERAGE

- Stops and up-to-date carrier appointment windows on all loads
- Accurate address and geofencing data on more than 90% of all stop locations
- No custom forms, or extra load data beyond the basic



MIDDLE OF THE ROAD

- Stops on all loads, but appointment windows are not accurate, limiting the use of off-schedule alerting
- Cell phone tracking with carriers that have available ELD or TMS integration data available



BELOW AVERAGE

- Stops added to trip sheets on <50% of loads
- Planned appointment times (but not accurate)
- Few carriers, no user-defined fields (UDFs) and no targeted emails



BOTTOM PERFORMERS

- Simply track a load number and cell phone
- No stops added to trip sheets, planned appointment windows, carrier codes, UDFs or email alerts



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About Descartes

► DESCARTES MACROPOINT™

Whether you're exploring a new visibility tool, or searching for ways to improve your existing program, Descartes MacroPoint can help. With our industry-leading supply chain visibility platform you can view, analyze, predict and communicate the status of all your freight shipments in real time. We can guide you through a successful implementation and help you identify opportunities to maximize your current visibility program's performance. Learn more at MacroPoint.com.

► DESCARTES SYSTEMS GROUP

Descartes (Nasdaq:DSGX) (TSX:DSG) is the global leader in providing on-demand, software-as-a-service solutions focused on improving the productivity, performance and security of logistics-intensive businesses.

Customers use our modular, software-as-a-service solutions to route, schedule, track and measure delivery resources; plan, allocate and execute shipments; rate, audit and pay transportation invoices; access global trade data; file customs and security documents for imports and exports; and complete numerous other logistics processes by participating in the world's largest, collaborative multimodal logistics community.

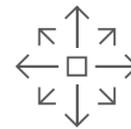
Our headquarters are in Waterloo, Ontario, Canada and we have offices and partners around the world.

Learn more at www.descartes.com, and connect with us on [LinkedIn](#) and [Twitter](#).



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