 Benchmarking TC-04

CHAIRMAN: Tom Ruggerio, R.C. Moore

VICE CHAIRMAN Tom Stephens, Paschall Truck Lines

AGENDA COMMITTEE Dan Rutherford, Buchanan Hauling & Rigging

Misty Darnell, Pashcall Truck Lines

Stephen Voorhees, Big G Express

MODERATOR: Chris Henry

#### AGENDA:

DATE AND TIME: **February 15th & 16th**

PLACE: **Hilton Tampa Downtown**

**Tampa, FL**

***Thursday, February 15th***

1. **7:30am Light Breakfast in Meeting Room**
2. **Call to Order at 8AM**
   * Opening Comments from the Chairman
   * Review the Agenda & Housekeeping
   * Anti-Trust Review
   * Roundtable Introductions
3. **“Hot Topics”-** Each Carrier address the following Questions:
   * How are you reviewing your current Capacity opportunities in the face of a higher demand?
   * What was your Forecast for Growth in your Top Line Revenue in 2018, how is that projection tracking as of today?
   * How do you decide who to say “No” to?
   * What new process/project/service have you implemented since last meeting? Positive/Negative results?
4. **Special Meeting Composite Review:**

* We will spend time reviewing the whole composite and the comparable data between the individual Carriers. We will look toward changes in company’s result

toward Revenue and Gross Margin, and efficiencies. Please review the **OCTOBER COMPOSITE**

1. **Break at 10:00AM**
2. **Organizational Structure:** We will ask everyone to submit a very focused Org Chart of your company. Please forward your **finished chart to me (Chris) by Jan 15th,** we will make a booklet of them all and send out to the Members before the meeting. We can then review and discuss during this session and refer during the whole meeting. Please include the following in your chart;
   * Sales Department Leader and who do they Report to?
   * Number of Outside Salespeople and Territory, National or some other responsibility
   * Internal Sales Structure – Customer Service (Who do they answer to?)
   * Customer Service Personnel Breakdown
     1. Customer Inside Sales
     2. Appointment Planning
     3. Scorecard Adjudication & Handling
3. **Customer Service:** Each Carrier be prepared to discuss the following topics. As we work our way around the room, we will build on the similarities that people have set up, and discuss some alternative structures.
   * How many customers are assigned to a CSR?
   * Is this the single point of contact for the customer after the sale?

* How often does your customer service people have direct contact with the customer on a weekly basis? Email? Telephone? How about face to face?
* Customer online tracking tools employed? (Hubspot, Insightly, Zoho etc).How do you ensure that communication with the customer has taken place and there is resolution to the situation?
* How much knowledge of profitability do your customer service people have?
  + How is the CSR incentivized? Gross sales growth / Load volume / Customer retention.

1. **Lunch at Noon**
2. **Contract Handling:**
   * Do you have a specific process on how Annual Bids are handled?
   * Accessorial Handling: What is the Process? Automated? Telematics use? TMS used?
   * What processes have you put in place to alleviate or reduce Appointment Fees?
   * Contract management (central filing, etc) – who keeps contracts (Sales, A/P, etc) and at what point does legal get involved, if general counsel is not already staffed?
   * How does Third-Party Payment / Audit company involvement change your process?
   * Do you set expectations about compliance with capacity expectations?
3. **Break at 3:00PM**
4. **Customer On-Boarding Process:**
   * Are Account Teams developed before, and who is picked for those Teams?
   * How are the specifics of a new customer or new lane communicated to operations?
   * How is Operations consulted before a new account or new lane is added?
   * When servicing a new location, how do you qualify the location for serviceability by your equipment?
   * What’s your process in evaluating your customers’ financial performance?
   * Do you have specific questions/steps for Third-Party Freight Payment / Audit Companies?
   * Describe your rate management process for customers?
5. **Adjourn with a Group Dinner @ 6:00 PM**

***Friday, October 17th***

1. **7:30am Light Breakfast in the Meeting Room**
2. **8:00am ADMINISTRATION:**
   * Old Business
   * New Business/Membership
   * Meetings:
     + **June 21st/2nd : San Diego**
     + **Oct 2nd / 3rd : Duncan & Son – Phoenix / Buckeye, AZ**
     + Need Topics & Attendee Number
     + Need Fall Date
3. **Best Idea Session:**

* Identify your Best Practice you have ever implemented.
* This should be focused on current Procedures, or any other Proposed Process you use today. **Forward me and Eddie the Electronic version of your presentation BEFORE THE MEETING, by October 5th!** Bring 1 Written copies of your Presentation.
* Each Carrier will put $40 in the Pool; after all presentations we will vote for the top 2 Presenters, and they will split the pool 60/40. Good Luck!

1. **Customer Service Tracking:** Open discussion covering the tracking methods internally:
   * Technology for track and trace so customers can look to see where their loads are at without sending an email and or a phone call and also a ball park cost on whatever technology they are using.
   * On Time Service tracking: policies and procedures to ensure on time delivery for high-service expectation customers.
   * How are Customers defining and measuring on time delivery (self-reporting, independent verification, etc).
2. **Break at 10:00am**

1. **Revenue Assurance:**

* How do you make sure you are capturing all accessorial charges? Is this a separate department?
* Are you charging for trailers washout to meet the food safety regulations?
* Credit Insurance and who do you use (D&B lookup, Coface, Ansonia, CompuServe, etc.)?
* How and who is performing risk scores for A/R limits?
* Your process for maintaining company policy on A/R collections?

1. **Technology/ EDI / Process Flow:**

* Technology you use to track and trace customers’ loads? Do they eliminate personal email or calls?
* On Time Service Tracking: policies and procedures to ensure on time delivery for high-service expectation customers.
* Are your Customers asking for more Transparency, and what is your plan for that?
* What are the New Challenges that EDI, Commitments, and On-Time Delivery Affect Operations Efficiency?
* Do you have ongoing issues with missing PODs? If not, how do you capture from Drivers?

1. **Concluding Discussion:**

* What are the Key Takeaways from this Meeting
* What will the Managers implement when they return to their Business?
* Other

1. **Adjourn at 12:00pm:**