



# MINING DATA INSIGHTS

**HERE'S HOW FREIGHT BILL AUDIT AND PAYMENT FIRMS  
UNEARTH, DIG INTO, AND LEVERAGE DATA FROM  
FREIGHT AUDITS TO PROVIDE SHIPPERS THE  
MOTHER LODE OF INFORMATION THEY NEED TO  
MAKE INTELLIGENT, STRATEGIC DECISIONS.**



**L**ike all sectors of the economy, the freight bill audit and payment (FBAP) market continues to evolve and respond to changes in the supply chain and the world at large, including technological advances, COVID-19, and increasing pressure to boost performance while reining in expenses.

“Today’s fast-moving global environment encourages companies to continually search for new ways to reduce expenses,” says Tom Zygmunt, manager of marketing and business development with Cass Information Systems. As part of this, technology continues to enhance the ways in which critical information—including freight payment data—is presented, so that it’s timely and useful.

This is a change. “Traditionally, freight audit was simply processing freight bills, performing an audit, and occasionally supporting the payment of carriers,” says Steve Beda, executive vice president, advisory services, with Trax Technologies, a provider of transportation spend management solutions. “The insightful data that resulted from this process was under-valued and under-utilized.”

No more. When done properly, the freight audit process excavates information that can be analyzed and leveraged to improve performance.



## FREIGHT BILL AUDIT & PAYMENT: MINING DATA INSIGHTS

The COVID-19 pandemic has upended supply chains, accelerated the shift to online shopping, and prompted more companies to accommodate remote workers. Some FBAP companies report seeing lower transaction volumes, as companies and consumers pull back on spending.

At the same time, the volume of parcel shipments has jumped. “The direct-to-home business has gone up more than 100% in some cases,” says Nick Fisher, director of sales and strategic partnerships with AR Traffic Consultants, a provider of transportation logistics services.

A few carriers have imposed new accessorial charges tied to COVID. “They’re the exception,” Fisher adds. “But we are seeing them pop up.”

Some products that previously moved in small quantities, such as disinfectants and personal protective equipment, now move by the truckload. “It’s a new type of supply chain that requires expedited shipping,” notes George Kontoravdis, president of Fortigo, a logistics management solutions provider.

### SHIFTING FOCUS

Another shift is the increase in spot quotes, as many companies that had contract rates with carriers had to quickly ship new commodities on new lanes. “To accomplish that, they moved to the spot market,” Kontoravdis says. “The audit focus also shifted to spot market invoices.”

A small amount of reshoring appears to be occurring. “Some customers are closing global locations outside North America and shifting them either to North America or Central and South America,” says Keith Snavelly, senior vice president, global sales with nVision Global Technology Solutions, Inc. It’s a small number so far, he adds, as most companies are taking a wait-and-see approach.

FBAP firms that can provide expertise, have invested in the technology and processes required to

facilitate interconnectedness between partners in the supply chain, and have robust transportation management, compliance, and analysis tools have been better able to navigate these changes.

“The COVID-19 pandemic is a wake-up call to rethink inbound international sourcing strategies and integrated partnerships with carriers and third-party logistics (3PL) providers,” says Beda.

**“SHIPPERS AND CARRIERS ARE PLACING INCREASED EMPHASIS ON VISIBILITY AND TRANSPARENCY.”**



**—JEFF PAPE  
SENIOR VICE PRESIDENT  
PRODUCT AND MARKETING  
TRANSPORTATION  
U.S. BANK**

### TECHNOLOGY MARCHES ON

Technological innovation also continues. Two areas of focus for many freight bill firms are automation and analytics.

“As companies strive to do more with less, they’re turning to automation to, for instance, submit invoices in an electronic environment,” Snavelly says. Shippers also are looking for solutions that allow them to leverage the information contained in their freight data.

Visibility also ranks high on companies’ priorities. “Shippers and carriers are placing increased emphasis on visibility and transparency,” says Jeff Pape, senior vice president of product and marketing, transportation, with U.S. Bank.

Moreover, many want to monitor these flows of information on their own. “DIY capabilities to access information and analysis are key, as they enable customers to make informed decisions,” Pape adds.

Another emerging area of focus is sustainability, says Michael Falls, director

of operations with enVista Corporation, a provider of supply chain solutions. enVista has received several requests for carbon emissions reporting, using both scientific analysis and information on transportation modes and lanes. “I don’t know that we had seen that request a single time prior to 2020,” Falls says.

In addition, “the regulations around knowing your trading partners and customers have become even more critical,” Pape says. For instance, U.S. Bank is compliant with the USA Patriot Act and the Anti-Money Laundering Act, among others.

And the United States-Mexico-Canada Agreement (USMCA), which went into effect July 1, 2020, replaces NAFTA. “It affects all shipments crossing the borders between the United States, Canada, and Mexico,” says Mark Cammarata, chief financial officer with Sunset Transportation.

Among other changes, the USMCA raised some de minimis shipment values, or the maximum shipment values at which products can enter a country while taking advantage of lower taxes and/or fees.

As more countries shift to electronic invoicing, different regions, countries, and even companies will have their own interpretations around digital signatures, transmission security, and data privacy. “Companies need to understand these nuances,” says Josh Bouk, chief revenue officer with Trax Technologies.

### SEARCHING FOR PARTNERS

Together, these changes are prompting shifts in the ways in which shippers and freight bill audit and payment providers work together.

“Five or six years ago, the marketplace was very transactional,” Falls says. “Companies looked for a provider who could perform an audit and save them some money, and that was it,” he adds. “Today, shippers want a company that not only has market-leading technology, but can act as a partner.”

Often, that means firms whose core

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## FREIGHT BILL AUDIT & PAYMENT: MINING DATA INSIGHTS

competency is freight payment, rather than companies that may simply be experimenting by adding freight payment capabilities as an adjunct to their other freight-related and logistics services, says Craig Cameron, vice president of sales and marketing with A3 Freight Payment. While adding freight payment allows them to offer one-stop shopping, it's often not part of their core competencies. "Some lack the expertise they need to partner with their customers and provide the service they're looking for," he adds.

The freight bill audit and payment companies profiled here focus on partnering with their clients to help them gain efficiencies and access the information they need to make intelligent, strategic decisions.

### A3 FREIGHT PAYMENT PAIRING TECHNOLOGICAL EXPERTISE WITH CUSTOMER SERVICE

A3 Freight Payment was started by a group of industry veterans with a passion for freight payment and a vow to conduct business transparently and collaboratively, while offering quality service and customized solutions. Clients come from a range of industries and include some of the largest shippers in the world. All are drawn to A3's robust solutions and its expertise in leveraging the information gained from them.

Shippers increasingly are looking for freight bill providers that can take the data their systems capture and offer accurate, meaningful analysis and insight. "At A3, we've devoted intensive efforts to ramping up our analysis capabilities," Cameron says.

Just as important, A3 offers the service and expertise required to transform analysis into business opportunities. For instance, A3's data analysis work with a company revealed that many products stored at the company's East Coast warehouse were being shipped to the



**"RATHER THAN PERFORMING A ONE-TIME ANALYSIS, WE OFFER CONSULTING INSIGHT AS PART OF OUR BASE SERVICE."**

**-CRAIG CAMERON  
VP, SALES AND MARKETING  
A3 FREIGHT PAYMENT**

West Coast, where the company also had a warehouse.

"They were paying significant freight costs to move this product to the West Coast, prompting the question: Should you store the products in your West Coast distribution center?" says Ross Harris, president of the Memphis-based firm.

#### A STRATEGIC PARTNERSHIP

A3 partnered with the customer to examine the business reasons that had kept the company from stocking the item on the West Coast, and also developed a business case for making the adjustments that would enable it to move the products' location.

"It wasn't just a case of opening up some rack space and dropping in this product," Harris says. "It also required making business changes." The experience shows the value of pairing technology with insightful customer service, he adds.

Tools such as artificial intelligence and machine learning allow for identifying particular opportunities, and that's a critical start. Companies also

need partners that can help them assess an opportunity and decide if and how to leverage it.

"Having the latest, greatest technology is great," Cameron notes. "But if you don't complement it with great service, it doesn't offer a lot of value."

These capabilities provide companies with both tactical and strategic advantages. For instance, A3 worked with another company to identify which shipments complied with their carrier agreements, while also quantifying the dollar amount associated with non-compliant shipping.

A3 also calculated the least-cost provider for each lane. "We were able to identify not only the cost of non-compliance, but also to let the company know where its routing guide was lacking," Cameron says. "Rather than performing a one-time analysis, we offer consulting insight as part of our base service."

The marriage of technology and service also means that A3 won't simply, for instance, identify exceptions and ask its client to figure out the reason. "A3 will go in, find the root cause, and correct it," Harris says.

Because A3 captures a tremendous amount of data on its customers' behalf—whether invoices, shipment, vendor or customer files, or others—it's in a unique position to deliver value. "As the industry evolves toward a more encompassing focus on transportation spend management, A3 is well positioned," Harris says.

### AR TRAFFIC CONSULTANTS CUSTOMIZING SOLUTIONS AND MAXIMIZING SAVINGS

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## FREIGHT BILL AUDIT & PAYMENT: MINING DATA INSIGHTS

It invests 5% of annual revenue to continually advance its technology solutions, Fisher says. Enhancements include technology to track shipments and shop for freight rates. An online portal through which shippers and carriers can exchange information reduces the volume of emails and phone calls previously needed to, for instance, check a payment status.

AR Traffic's products and services are designed to help its clients boost efficiency, accuracy, control, and auditability, while also lowering their freight costs.

Because the solutions are available through the cloud, clients can access them through their web browsers. This includes solutions to rate and route inbound and outbound shipments, and to combine less-than-truckload (LTL) shipments into multi-stop truckloads.

AR Traffic offers its products as modules, allowing the company to customize a package to fit each customer's needs. (Companies can also deploy the solutions on-premise, if they choose.)

With its sophisticated audit system, AR Traffic's freight payment software enables companies to efficiently handle freight payment in-house.

### CENTRALIZED DATABASE

In addition, AR Traffic offers a comprehensive freight payment service. "The customer's carrier-specific rates are stored in our central database and are securely available through the internet," Fisher says.

AR Traffic can leverage this database to pre-audit all bills, ensuring proper payment, and controlling for incorrect rates, carrier discounts, accessorial charges, classification errors, and fuel surcharges.

Currently, about half of AR Traffic's clients pay their own carriers directly after AR Traffic processes their bills, and about half use the freight payment service.

For these clients, AR Traffic submits



**"WE CAN COMPARE EACH CUSTOMER TO THE REST OF ITS INDUSTRY AND PROVIDE A SCORECARD THAT'S INVALUABLE WHEN NEGOTIATING RATES."**

**-NICK FISHER  
DIRECTOR**

**SALES AND STRATEGIC PARTNERSHIPS  
AR TRAFFIC CONSULTANTS**

payments electronically after receiving payment from the customer. AR Traffic's electronic payment processes streamline this function. The company also is handling more credit card and funds transfer payments. "These types of payments have definitely increased over the past five years," Fisher says.

The central freight rate database AR Traffic maintains enables it to meet the growing need of customers to benchmark freight rates, as the database contains freight information from companies across multiple industries and of all sizes.

"We can compare each customer to the rest of its industry and provide a scorecard that's invaluable when negotiating rates," Fisher says. Indeed, some companies' annual savings from benchmarking easily hit six figures, he adds.

The analysis capabilities that AR Traffic provides extend even further. For instance, by using a client's historical

shipment data, AR Traffic can analyze its LTL and truckload shipments to determine whether combining shipments into multi-stop/multi-origin truckload shipments would cut costs and boost customer service.

AR Traffic also can calculate whether establishing pool points makes sense and analyze the cost of establishing and/or moving pool points to keep up with changing shipping patterns.

## CASS INFORMATION SYSTEMS OFFERING CUSTOMERS A COMPETITIVE ADVANTAGE

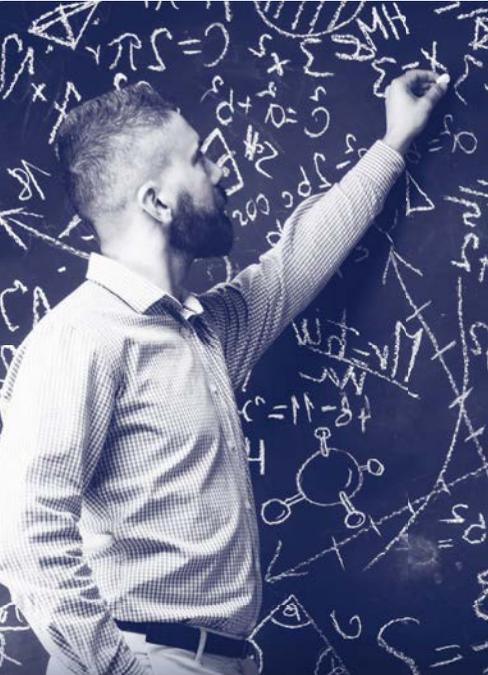
Cass Information Systems, a leading provider of freight audit, payment, and business intelligence services based in St. Louis, Missouri, draws on its 60 years of experience to process more than 63 million invoices and disburse more than \$60 billion annually. Its invoice processing operations span more than 185 countries and can accommodate 114 currencies.

Most of the company's customers spend millions on freight and/or ship millions of packages each year. "They're looking for best practices to control and manage their transportation expenses," says Zygmunt. While North America has been Cass's primary market, many of its clients require global capabilities.

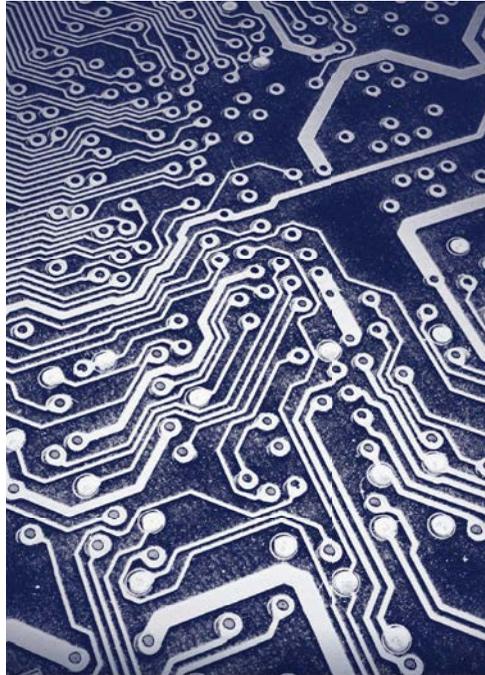
In addition to its larger customers, Cass serves small- to mid-sized companies that have substantial freight or parcel volumes, and that also are looking to reduce their processing costs and/or have a thorough audit of their shipments.

Many logistics operations, no matter their size, are exploring ways to better manage their freight by accessing transportation and accounting data that isn't available through their internal systems. "Data isn't worth anything if you can't get to it," Zygmunt says.

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## FREIGHT BILL AUDIT & PAYMENT: MINING DATA INSIGHTS

The customized business intelligence solutions available through Cass offer clients a competitive advantage by enabling them to reduce costs, increase efficiency, and enhance their decision-making ability.

As customers' needs change, Cass's services continue to evolve. For instance, a growing number of companies want to reduce processing expenses through an outsourced freight rating, audit, payment, and business intelligence solution. "This requires people, process, expertise, and information to manage the function," Zygmunt says. "Cass can provide this. It's our focus."

Cass also offers supply chain finance solutions that help clients manage their working capital, as well as expense payables solutions for utility, telecom, and waste management invoice processing.

**"OUR SOLUTIONS KNOW X AMOUNT OF FREIGHT GOES TO THE PEANUT BUTTER, AND Y AMOUNT GOES TO THE JELLY."**

**-TOM ZYGMUNT  
MANAGER**

**MARKETING AND BUSINESS DEVELOPMENT  
CASS INFORMATION SYSTEMS**



Even as the industry evolves and technology advances, one constant has remained in the forefront of the freight audit and payment industry: the continued appetite for more information. Among other capabilities, Cass's solutions can allocate freight costs down to the SKU level, so companies can properly allocate expenses to different products and then price them accordingly.

"They know x amount of freight goes to the peanut butter, and y amount goes to the jelly," Zygmunt adds. Cass also provides traffic lane information so shippers can assess carrier efficiency.

Cass worked with a global

manufacturer, helping it consolidate its freight payment activities. The company saved on its freight spend, while the visibility it gained to all shipments, costs, carriers, payments, and other activities across the globe significantly simplified rate management.

Cass may be one of a handful of companies whose continuity plan included procedures for a pandemic event, such as actions to take if servers went down or employees needed to work remotely. "It worked wonderfully for us," Zygmunt says. "We went home on Friday and were up working on Monday." The plan also addressed precautions to safeguard employees who continued working in the office or other locations, including with clients.

### CT LOGISTICS PROVIDING ACTIONABLE INSIGHTS FOR CONTAINING COSTS AND PLANNING

In 1923, CT Logistics was founded as a freight bill auditing company. Since then, its technology and offerings have substantially expanded to include a transportation management system, third-party logistics and brokerage services, a shipping cooperative for LTL services, licensed shipping and FBAP software, benchmarking, rate studies, professional services, and online dashboard business intelligence.

While typical clients of the Cleveland-based company have an annual freight spend of at least \$500,000, CT Logistics works with firms of all sizes and from all geographic regions.

"The real thrust of the freight payment business today is actionable information," says Allan J. Miner, president of CT Logistics. CT's sophisticated reporting capabilities allow clients to easily perform calculations, create graphics, generate pivot tables, and email reports anytime.



**"THE REAL THRUST OF THE  
FREIGHT PAYMENT BUSINESS TODAY  
IS ACTIONABLE INFORMATION."**

**-ALLAN J. MINER  
PRESIDENT  
CT LOGISTICS**

CT Logistics' AuditPay®, a freight bill audit and payment service, helps companies monitor and control their transportation spending. Its comprehensive rates database, when paired with the company's FreightRater® pricing engine, helps support shipment activity.

In addition, the team of professionals at CT Logistics works closely with clients to ensure proper audit and payment processing. By combining technology and expertise, this freight payment service delivers insight that facilitates effective cost containment and planning.

Many reporting or business intelligence capabilities rely on query-based analysis capabilities that restrict users to a linear exploration within a partial view of their data. In contrast, the engine behind CT Logistics' Qlik reporting system lets companies combine multiple data sources, freely explore across all their data, and instantly pivot their analysis based on what they see.

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## FREIGHT BILL AUDIT & PAYMENT: MINING DATA INSIGHTS

Clients can develop, extend, and embed visual analytics in their apps, portals, or other medium. CT Logistics can also set up Qlik within a common governance and security framework that covers all a company's personnel around the globe.

### **DIGITIZING DOCUMENTS**

In response to the pandemic, CT Logistics has added to and enhanced its client-facing, web-based applications and services, making them easier to use and more robust. It has also accelerated its timeline to completely digitize all documents using artificial intelligence through the company's intelligent character recognition (ICR) software.

A company in the flooring industry asked for CT's help as it shifted most of its LTL shipments from the company's satellite facilities across North America to a centralized, consolidated, and leveraged bidding process. CT Logistics, acting as agent for the company and leveraging information on its combined freight spend, requested bids from multiple carriers, negotiated rates, and benchmarked the bids against similar other client freight spend profiles.

"We were able to develop the best overall corporate LTL program for the company," Miner says, helping to cut carrier freight rates by nearly 15%.

### **CTSI-GLOBAL OPTIMIZING END-TO-END LOGISTICS STRATEGIES**

CTSI-Global views each of the more than 6 million freight transactions it processes each day as an opportunity to save its customers money. And with a staff that brings a total of 400-plus years of industry experience, it's in a position to leverage these opportunities.

"Companies are no longer looking for just the basic blocking and tackling of freight audit," says Josh Miller, vice

president of sales with the Memphis-based firm. "We can add so much more value."

Each year, CTSI-Global processes more than \$20 billion in freight bills and its network encompasses more than 20,000 carriers. It is the largest privately held freight bill audit provider in the world.



**"COMPANIES ARE NO LONGER  
LOOKING FOR JUST THE BASIC  
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FREIGHT AUDIT. WE CAN ADD SO  
MUCH MORE VALUE."**

**-JOSH MILLER  
VP, SALES  
CTSI-GLOBAL**

While the return on investment generated by the audits CTSI-Global completes is critical, the greater value comes from the data collected. Miller notes that the company's systems capture nearly 200 data elements from each invoice, as well as information from the ERP systems with which they interface.

Miller and his colleagues help clients use this data and CTSI's business intelligence applications to benchmark performance, assess key performance indicators, and identify cost

savings opportunities.

For instance, the carrier report cards CTSI-Global prepares allow shippers to evaluate how well each carrier is performing, and whether lower-cost providers are actually saving money. Shippers can deploy the information on rates, lanes, and service levels, among other facts, that CTSI-Global's systems generate to cut costs and enhance service.

CTSI-Global leveraged its freight bill audit and transportation management solutions to help a defense production company with operations in 120 countries consolidate and bring consistency and efficiency to its freight audit function. Previously, the functions in each region were managed independently, with varying levels of effectiveness.

By implementing a global freight bill audit process that handled differing languages, regulations, and other variables in each country, CTSI-Global helped the company improve its audit function, mine its freight data, and then use that information to negotiate better pricing and reduce the volume of shipments moving by priority services.

The result? The company reduced its transportation spend by about 12%.

### **TMS IN THE MIX**

Also as part of its suite of solutions, CTSI-Global offers a proprietary, end-to-end transportation management system (TMS). Its TMS incorporates applications for order management, load optimization, carrier selection, shipment execution, and claims management, among other functions.

CTSI-Global also holds a brokerage license, Miller says. Because of the volume it offers, CTSI-Global often can negotiate more aggressive carrier pricing than many shippers can capture on their own.

Through its logistics management services, CTSI-Global helps its clients optimize their overall logistics strategies. "We're a true 4PL," Miller says.

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The logo for enVista features the word "enVista" in a white, sans-serif font. The letter "V" is stylized with a yellow swoosh that arches over the top of the letter. A registered trademark symbol (®) is located to the upper right of the word.

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## FREIGHT BILL AUDIT & PAYMENT: MINING DATA INSIGHTS

### enVISTA CREATING TRANSPORTATION SPEND EFFICIENCIES

enVista's size and scope in the FBAP market are impressive: Each year, the firm audits more than 1.5 million shipments per day and more than \$9 billion in freight spend across all modes of transportation.

"But most important, in 2019, enVista had a 99% client retention rate," says Michael Falls, director of operations. "We're very proud of that and suspect it's pretty rare."

Key to many clients are the five pillars on which enVista's transportation partnerships are based. These are: invoice audit and automation, transportation finance and payment, contract optimization, business intelligence, and network analytics.

For instance, myShipINFO enables enVista, through a partnership with JP Morgan Chase, to process and bill invoices in 168 currencies and dozens of languages, helping clients across the globe better manage their cash flow. enVista also is GDPR compliant.

enVista's myShipINFO business intelligence product provides shippers with built-in dashboards that identify both cost drivers and cost savings opportunities. The solution also validates that the data is accurate and usable.

Falls provides a timely example: Carriers can bill COVID surcharges in multiple ways—say, "emergency surcharges," "COVID surcharges," or "CV charges," among dozens of other variations. enVista normalizes these variations, so shippers can quickly gain visibility to all, no matter how they're billed.

Shippers also can design, configure, and create customized reports that provide the information needed to optimize their transportation function.

They also can leverage network optimization tools to analyze operations across their distribution networks, and then identify steps to improve them.

Through its contract optimization capabilities, enVista helps customers manage and source carrier agreements across all modes and geographies. enVista works to ensure carriers correctly apply rates and that any billing points, from the freight cost all the way through the surcharges, are valid and assessed correctly.

**"WE'RE ABLE TO BE AN  
EXTENSION OF OUR CLIENT'S TEAM  
TO REDUCE COST AND CREATE  
EFFICIENCIES IN EVERY FACET OF  
THEIR TRANSPORTATION SPEND."**

**—MICHAEL FALLS  
DIRECTOR OF OPERATIONS  
enVISTA**



The carrier services group within enVista supports carriers with their payment and remittance requests. It also schedules remittance reporting that's provided directly to carriers.

enVista recently worked with a multi-channel retailer that sources globally, has multiple distribution nodes throughout its manufacturing and distribution networks, and spends about \$500 million on shipping each year.

Using both proactive analytics and its auditing expertise, enVista identified savings of about 5% of the company's annual transportation expense. The savings resulted from multiple strategies, including analyzing box sizes to eliminate avoidable surcharges, avoiding rate errors, and evaluating lanes and routes to optimize carrier use.

These savings don't even include enVista's work assisting the retailer in strategic sourcing and negotiating carrier contract agreements. Falls anticipates additional savings of 8 to 12% of the

company's total parcel spend from these efforts. "We're able to be an extension of their team to reduce cost and create efficiencies in every facet of their transportation spend," he adds.

### FORTIGO GUARANTEEING ACCURACY AND SUPPORTING EVOLVING STRATEGIES

Fortigo offers freight audit solutions that fit seamlessly into established supply chain software solutions. They provide a rapid return on investment by optimizing logistics processes, minimizing ship-to-order times, and streamlining collaboration with logistics providers, says president George Kontoravdis.

Fortigo works with multinational organizations including three of the four largest U.S. airlines, distributors, and high-tech companies. Many have high shipping volume, hundreds of locations, dozens of carriers, and use virtually all modes of transportation.

From its base in Austin, Texas, Fortigo is uniquely positioned to help companies optimize their transportation spending. Its freight bill audit solution automatically reviews freight bills and identifies incorrect charges based on multiple criteria, including carrier service level agreements, negotiated rate sheets, and volume discounts.

It matches shipments to the original order numbers or purchase orders, reducing the risk of duplicate invoices. The solution also identifies, for instance, shipments that lack proof of delivery or that weren't picked up by the carrier, but have been charged.

"Fortigo is the only provider that guarantees freight audit accuracy," Kontoravdis says.

Just as important, the freight bill audit platform supports clients' evolving transportation strategies—an essential

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## FREIGHT BILL AUDIT & PAYMENT: MINING DATA INSIGHTS

ability during a pandemic. “The majority of our clients reconfigured their supply chain routes and networks, using the business rules engine in Fortigo’s transportation management system,” Kontoravdis says.



**“WE’RE CONTINUING TO WORK TOWARD SOLUTIONS THAT ENABLE LOGISTICS EXECUTIVES, WITH A COUPLE OF CLICKS, TO SEE THEIR LOGISTICS PERFORMANCE IN A CONSISTENT WAY.”**

**—GEORGE KONTORAVDIS  
PRESIDENT  
FORTIGO**

For instance, some quickly grounded all parcel shipping, while others consolidated LTL shipments into truckload shipments to save money.

“Fortigo re-prioritized its road map—literally overnight—to better respond to our customers’ rapidly evolving needs,” Kontoravdis says. “As a result, many achieved network-wide, cost savings, also overnight.”

Fortigo’s robust reporting solutions can capture and assemble critical transactional data elements, providing shippers with actionable insight. Moreover, Fortigo continues to build on its analytics capabilities, enhancing

logistics executives’ ability to capture and review information on their own, without having to call in IT professionals to provide support.

Fortigo also is investing heavily in developing solutions that offer both ease of use and sophisticated capabilities. “We’re continuing to work toward solutions that enable logistics executives, with a couple of clicks, to see their logistics performance in a consistent way,” Kontoravdis says.

Because Fortigo’s offerings are built on a software-as-a-service (SaaS) delivery model, deployment occurs over the cloud. Implementation time frames vary with the customer, but typically run between three and six months for a full-scale freight audit set-up.

Clients moving from manual processes to Fortigo’s freight audit service often save up to 10%. Adding a transportation management solution compounds those savings.

To best serve its clients, Fortigo’s team will evaluate all areas presenting challenges. This might mean reviewing transportation expenses and volumes and looking at the mix of shipments and carriers.

“We look to understand where we can add the most value,” Kontoravdis says. “Our goal is to maximize savings from day one.”

### **nVISION GLOBAL CREATING A GLOBAL DATA WAREHOUSE FOR AN ENTERPRISE- WIDE VIEW**

nVision Global, a provider of freight invoice auditing and transportation management solutions, among other applications, manages more than \$6.5 billion in annual spend. Each year, it processes more than 150 million transportation invoices that hail from more than 190 countries.

“We’re truly global,” says Keith

Snavely, senior vice president, global sales with the company. nVision’s seven processing centers span three continents, and while the company is based in McDonough, Georgia, more than 80% of its employees work outside North America.

“We have customer service departments in all locations and time zones, and our employees speak 22 languages,” he adds.

#### **DISMANTLING SILOS**

nVision’s solutions dismantle information silos to create a single, global data warehouse of all its customers’ transportation activity. The solutions’ robust data cleansing and normalization capabilities allow them to assemble and compare data from the disparate systems often found in multinational organizations.

**“WE POSITION OURSELVES AS PART OF OUR CUSTOMERS’ LOGISTICS AND ACCOUNTING DEPARTMENTS, RATHER THAN JUST A VENDOR. WE HELP THEM OPTIMIZE TRANSPORTATION FUNCTION AND REDUCE COSTS.”**

**—KEITH SNAVELY  
SENIOR VICE PRESIDENT,  
GLOBAL SALES  
nVISION GLOBAL**



Together, these capabilities provide the logistics teams with an enterprise-wide view of their organization’s transportation spend. They can easily see if, for instance, it would be less expensive to shift transportation modes or to relocate some operations.

When exceptions occur, nVision doesn’t simply send a spreadsheet that lists the exception code. “Through nVision’s robust exception management tool, customers can log on and view images of their invoices, as well as the

# Total Transportation Spend Management – Freight Audit Transformed.



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## FREIGHT BILL AUDIT & PAYMENT: MINING DATA INSIGHTS

supporting documents and auditors' notes," Snavelly says.

The exception management solution also provides a forum for online communication, facilitating collaboration and helping the parties reach a final disposition—without multiple rounds of phone calls and emails.

Along with electronically processing more than 90% of invoices, nVision employees remain focused on developing new, more efficient ways to receive invoices electronically, rather than through the mail.

"Recipients can receive invoices more quickly and cleanly, and with greater visibility to shipment data," Snavelly says.

For instance, nVision's solutions support the use of APIs, ANSIX12, and EDIFACT interfaces, to electronically capture data. While nVision continues to work with electronic data interchange (EDI), by also supporting APIs, it's able to more efficiently send complete shipment documentation.

nVision also is providing greater integration through its TMS systems, offering shippers a way to efficiently execute shipments and gain visibility.

### WATCH YOUR FOOTPRINT

Business intelligence and analysis continue to be primary initiatives at nVision, which regularly adds to its suite of analytical tools.

For instance, it has begun providing companies data on their carbon footprint, drawing from the transportation mode used and the length of the haul. "It may be small, but this ability may lead to reductions in carbon footprints," Snavelly says.

Clients new to nVision typically save between 9 and 12% of their transportation spend. "We try to position ourselves as being part of our customers' logistics and accounting departments, rather than just a vendor," Snavelly says. "We help them optimize transportation function and reduce costs."

## SUNSET TRANSPORTATION GAINING FULL VALUE FROM FREIGHT INFORMATION

Sunset Transportation's commitment to its customers is shown in its resolve to deliver on five promises: savings, visibility through technology, data-driven decisions, continuous improvement, and relationships. From its founding in 1989, Sunset, based in St. Louis, Missouri, has focused on helping customers drive efficiency in their shipping and logistics operations. It has offices and agents across the country and customers who ship around the globe.

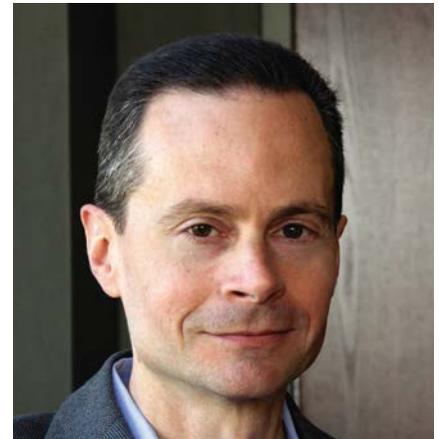
At its start, Sunset Transportation focused on specialty services such as LTL and diverse product hauling. As its business grew, Sunset automated its freight audit and payment processes, boosting billing efficiency and back-office customer support.

Among other services, Sunset now offers freight bill processing, audit, and discrepancy resolution. Its customers span multiple sizes and industries, from mid-sized local businesses to Tier 1 automotive suppliers.

"Companies want a solution for all their freight, as well as combined visibility across all transportation types," says Mark Cammarata, chief financial officer. "They want their data available to extract and merge into their existing systems. They also want options to consume their data in ways that fit their current processes."

To that end, PayLOGIK, Sunset's freight audit and payment system, handles all transportation modes, providing freight invoice and data management in a configurable customer dashboard. Sunset's flexible reporting capabilities enable customers to tailor reports to their needs.

In addition, many customers gain full value of their freight information by importing data directly into their



**"COMPANIES WANT A SOLUTION  
FOR ALL THEIR FREIGHT, AS WELL  
AS COMBINED VISIBILITY ACROSS  
ALL TRANSPORTATION TYPES."**

**-MARK CAMMARATA  
CHIEF FINANCIAL OFFICER  
SUNSET TRANSPORTATION**

own systems. "They can then merge their freight information with other operational data to support more comprehensive decision-making," Cammarata says.

And while Sunset offers integration options, customers can also complete essential functions by logging into Sunset's website to review and approve their invoices, perform research, and access their data, among other functions.

### CUSTOMIZED IMPLEMENTATION

When Sunset begins to work with a new client, it follows a comprehensive, yet customizable implementation guide. "Our process is very flexible and tailored to the specific needs of each customer," says Susan Vogler-Wesp, controller.

Sunset will gather, for instance, a sample of the freight bill history to understand the customer's transactions and present ideas on how they can best use their data. The Sunset team also will work through any reference fields or extra data they want to capture, as well as their audit requirements



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## FREIGHT BILL AUDIT & PAYMENT: MINING DATA INSIGHTS

and expectations.

“The goal is to create a robust freight database that facilitates business decisions,” Vogler-Wesp adds. Depending on the complexity and resources available, companies can get up and running in as little as four to six weeks.

Sunset’s model to achieving transportation savings differs a bit from the industry’s, Cammarata says. Many companies tend to quote between 2 and 5% potential savings, with the provider sometimes paid a portion of the savings they identify. “Under that model however, the provider actually benefits when billing errors continue to be made,” Cammarata says.

While Sunset also identifies mistakes, it then works with the carrier to rectify them, so future billings are correct. “This brings efficiency and confidence to the table and improves the relationships of all parties,” Cammarata says. “Our model is built on process improvement, not catching repeated mistakes.”

Often the real savings come from more efficiently processing transactions, leaving customers additional time to handle functions that are more central to their core business.

### TRANS AUDIT MORE THAN MONETARY BENEFITS

Trans Audit, the world’s largest global freight and parcel post audit specialist, utilizes its information-rich approach to maximize monetary refunds, but more importantly provides financial and process improvement insights obtained in the post audit process to its client base of Fortune 500 and Global 1000 entities.

With analysts in six U.S. offices, as well as Europe, Singapore, and China, Trans Audit has been in operation for more than 40 years and employs subject matter experts in all modes of transportation.

**“A TRULY CONSULTATIVE POST AUDIT SHOULD DELIVER MORE THAN JUST MONETARY BENEFITS; IT SHOULD ALSO PROVIDE CONTINUOUS IMPROVEMENT AND INSIGHT INTO EACH CLIENT’S PAYMENT PROCESSES AND SUPPLIER RELATIONS. OUR ULTIMATE OBJECTIVE IS TO DELIVER A NON-INTRUSIVE, CLIENT-FOCUSED, INFORMATION-RICH, HIGH-ROI SERVICE.”**



**—CHAD W. KENNEDY, IV  
PRESIDENT  
TRANS AUDIT**

Trans Audit’s unparalleled capabilities for data receipt, processing, analysis, and claims generation enable it to recover more overpayments and identify more cost reduction opportunities compared to internal or competitive reviews.

#### UNCOVERING HIDDEN VALUE

Trans Audit uncovers and recuperates hidden value and funds in paid transportation bills. “We focus solely on a true global, multimodal post-payment audit,” says Vikki L. Van Vliet, senior vice president of sales and marketing. “Trans Audit’s post-payment audit unobtrusively operates after freight audit and payment providers and internal audits.

“We identify and recover both overbilling and overpayment errors, and provide a secondary level of insurance, especially as carrier billing and human errors are commonplace,” adds Van Vliet.

Trans Audit identifies and recovers money for errors in freight rates, accessorials, distance, discounts, currency conversions, classifications, fuel, and more. It also uncovers payments to wrong parties, multiple payments, and incorrect payment

ownership—that is, bills or portions of bills that clients paid even though they were not responsible for them.

Trans Audit operates purely on a contingency, or benefit-sharing basis, whereby Trans Audit earns a percentage of the recoveries it ascertains.

“We audit for payment accuracy and ownership, as well as tariff and contract compliance to ensure that all clients’ invoices are billed and paid correctly,” says Van Vliet.

Trans Audit also performs a logistical trend analysis to identify recurrent anomalies, confirm that accessorial charges make sense, and clients actually received the benefit of the services billed.

Trans Audit’s simple, swift, and straightforward post audit onboarding process typically takes weeks rather than months. Trans Audit directly and independently obtains data from pre-audit companies, carriers, 3PLs, or 4PLs its clients employ, as well as from clients’ ERP, TMS, or other systems.

Trans Audit’s primary objective is to minimize the level of client resources necessary to commence and support the post audit process, while simultaneously maximizing each client’s returns.

Trans Audit’s dedicated carrier relations department submits, coordinates, and resolves refund claims collaboratively with all carriers, with little or no client involvement. As a result, clients find the post audit and claim resolution process, as well as ongoing support, to be efficient and non-resource intensive.

“Carriers deliver our clients’ products, and also deliver our ‘end product,’ which is refunds, hence, it is critical to protect our client’s and our relationship with the carrier,” says Susan Ashley, director of carrier relations.

#### PROCESS IMPROVEMENT

TransPortal™, Trans Audit’s proprietary and robust cloud-based claims analytics system and query tool, provides every client the ability to monitor, manage, and improve payment processes, and



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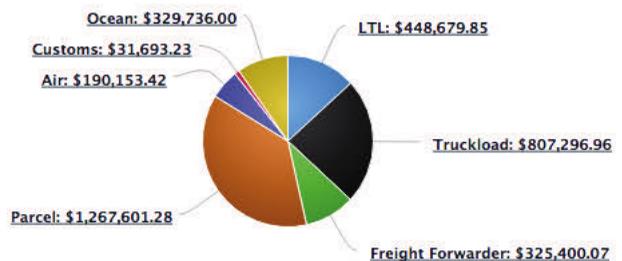
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carrier billing accuracy.

TransPortal™ provides visibility and transparency to filed, open, and paid refund claims, as well as claims by mode, carrier, and error type, among other key metrics. Clients use this valuable information to correct recurring errors and make process improvements.

“A truly consultative post audit should deliver more than just monetary benefits; it should also provide continuous improvement and insight into each client’s payment processes and supplier relations,” affirms Chad W. Kennedy, IV, president of Trans Audit. “Our ultimate objective is to deliver a non-intrusive, client-focused, information-rich, high-ROI service.”

### TRAX PROVIDING TRANSPORTATION SPEND SOLUTIONS TO OPTIMIZE SAVINGS

Trax Technologies delivers transportation spend management solutions for organizations that require a single solution capable of managing global, multi-modal complexity. With

“hundreds of boots on the ground” around the world, Trax delivers quality service to global enterprises, generally with transportation spending of at least \$50 million, says Steve Beda.

Based in Austin, Texas, Trax focuses on companies in the life sciences, high tech, manufacturing, retail, food and beverage, and consumer packaged goods industries.

“For many shippers, the cost of transportation logistics is a significant spend category and usually impacts the bottom line,” Beda says. “Both total freight spend and the level of complexity drive the need for better processes to capture, audit, pay, and analyze this spend category.”

Trax’s tools improve freight payment operations in multiple ways. They include collaboration tools that connect shippers, carriers, 3PLs, and Trax to improve automated electronic invoice capture, claims resolution, payment status, and contract/spot quote rate management.

Trax solutions also facilitate data governance as a process improvement strategy, fostering a high level of data accuracy and completeness, improving the ability to analyze that data. Trax continues to invest in advanced analytics



**“THE COST OF TRANSPORTATION LOGISTICS IS A SIGNIFICANT SPEND CATEGORY AND USUALLY IMPACTS THE BOTTOM LINE. BOTH TOTAL FREIGHT SPEND AND THE LEVEL OF COMPLEXITY DRIVE THE NEED FOR BETTER PROCESSES TO CAPTURE, AUDIT, PAY, AND ANALYZE THIS SPEND CATEGORY.”**

**-STEVE BEDA  
EXECUTIVE VICE PRESIDENT  
ADVISORY SERVICES  
TRAX TECHNOLOGIES**

## Questions to Ask a Freight Bill Payment and Audit Provider

When evaluating freight bill payment and audit providers, addressing the following questions can help ensure a more effective partnership.

- **How financially stable and trustworthy is the firm?**

A few freight bill audit and payment firms have misappropriated funds, notes Miner of CT Logistics. Several steps can help minimize this risk. They include checking whether the firm can provide audited financial statements, has SOC II and ISO certification, and maintains an employee dishonesty bond of at least \$1 million.

- **How will your funds be managed?**

Your company’s funds should be kept in a separate bank account, and not comingled with the provider’s operating

funds, Cammarata of Sunset says. Once you pay the provider, it should remit payment to the carriers within a few days.

- **How will your data be managed and secured?**

Freight bills can contain sensitive data. Check how this information is secured, Pape of U.S. Bank advises.

- **How up-to-date, secure, scalable, and reliable is the firm’s technology?**

The freight payment provider should not only use the latest technology, but also invest in its systems and services on a continual basis, Zygmunt of Cass says. You want to know that as your firm grows and changes, the technology will be able to support it.

*continued on pg. 94*

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that can make information actionable, and help shippers identify strategies that allow them to maintain service levels at the lowest cost possible.

The cloud-based solutions Trax offers are designed to help companies transition from a simple freight audit payment process to a mature and effective transportation spend management (TSM) environment. Trax's TSM Maturity Model has three levels, says Josh Bouk, chief revenue officer. These are:

**Level 1: Freight Data Governance.** Enterprises that reach this level can be confident they are effectively and accurately auditing, paying, and reporting on their transportation spend across all modes and geographies, while complying with local taxes and

regulations. They can access consistent reporting throughout the world.

**Level 2: Financial Management & Carrier Management.** These enterprises are able to leverage the rich data governance environment they previously established, and improve accrual accuracy for shipped but not billed spending, conduct variance analysis to identify inconsistencies, budget and forecast, manage carrier rates, complete carrier scorecards, among several other capabilities that boost the sophistication and maturity of the transportation spend process.

**Level 3: Transportation Optimization.** These companies can build upon their previous progress by executing a range of complex, data-intensive analyses designed to

identify opportunities to further drive out cost. This might include network optimization, sourcing and benchmarking strategies, packaging optimization, routing guide optimization, or accessorial avoidance, among other actions.

Savings levels increase as companies move along this continuum, and typically range from 2 to 14% annually, Bouk says. For instance, over the past 30 months, Trax partnered with a manufacturer whose annual global transportation spending exceeds \$400 million. In the first six months of the partnership, Trax helped the company achieve Maturity Level 1, and save more than \$10 million.

More recently, the company achieved the financial management

*continued from pg. 92*

### Questions to Ask a Freight Bill Payment and Audit Provider

Freight bill providers can add significant value, but need the latest technology to do so. Ask what percent of revenue the firm spends on research and development, says Miller of CTSI-Global, noting 10 to 15% is a reasonable amount. "Having a company that leverages the latest technology is key to their ability to drive value."

- **How truly global are the firm's operations?**

A true multinational provider will have a physical presence in each region of the globe, including employees who understand transportation services in that region, Snively of nVision says. It should be capable of processing all modes of transportation invoices and able to remit payment in any common-traded currency.

- **What visibility can the firm provide?**

The provider should offer comprehensive network visibility across all modes, and from multiple disparate data sources, from around the globe, Falls says.

- **How robust is the firm's data governance capability?**

Solid data governance requires a programmatic approach that includes capturing information from various sources, avoiding silos of information, and maintaining a compliance program to ensure proper management of source information, Beda of Trax says. "It's not like a light switch you can just flip on," he adds.

- **What reporting capabilities does the provider offer?**

For instance, can you run reports and gain the information you need to monitor operations, plan for the future, and improve performance?, Pape from U.S. Bank asks. Just as important, are these capabilities available without having to involve IT?

- **How does the firm manage carrier relationships?**

Most shippers benefit by maintaining strong relationships with their carriers. A FBAP can help. Ask if the

provider has a staff committed to maintaining carrier relations, and online applications to facilitate and ease communication for freight bill payment, Miner of CT Logistics says.

- **How independent is the firm?**

Some logistics providers also offer freight bill auditing. That can present a conflict of interest, Harris of A3 Freight Payment says. For instance, if a 3PL has a relationship with a major carrier and then finds an overcharge, it may be more inclined to accommodate the carrier, rather than advocate for the shipper.

- **Can the audit firm support spot rates?**

The COVID-19 pandemic has caused many carriers to shift from contracted to spot rates, says Miller of CTSI-Global. This makes it more difficult to forecast or record accruals, because it's harder to know where the market might go. "Ask the auditor for details on how they support audits of spot quotes," he adds.

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component of Maturity Level 2. The company's new ability to forecast and accrue more accurately has helped it identify another \$14 million in savings opportunities. Over the next six months, as the company implements new carrier management strategies, Trax expects savings to total up to \$44 million.

### U.S. BANK CONFIGURABLE AND FLEXIBLE SOLUTIONS BUILD COLLABORATIVE PARTNERSHIPS

U.S. Bank's powerful freight audit and payment system provides a single solution through which shippers and carriers can manage their freight payment and audit functions for all transportation modes.

Annually, U.S. Bank processes more than \$28.8 billion in freight payments. Its online solution enables organizations to both automate their freight audit and payment processes, and gain the business intelligence they need to maintain a competitive edge. Most customers range from middle-market companies to larger enterprises.

"Our solution allows for an end-to-end view of the freight invoice audit and payment process," says Jeff Pape, senior vice president, product and marketing, transportation, with the Minneapolis-based firm.

U.S. Bank's solution, which is offered as a software-as-a-service, is highly configurable and flexible, and can interface with most transportation management or ERP solutions. "We ease the way for companies to move from paper to electronic," Pape says.

#### CATCHING ERRORS BEFORE PAYMENT

The solution also offers numerous standard dashboards and reports, as well as robust ad hoc reporting capabilities.

Because U.S. Bank's prepayment audits catch errors before invoices are



**"OUR SOLUTION ALLOWS FOR AN  
END-TO-END VIEW OF THE FREIGHT  
INVOICE AUDIT AND PAYMENT  
PROCESS."**

**-JEFF PAPE  
SENIOR VICE PRESIDENT  
PRODUCT AND MARKETING  
TRANSPORTATION  
U.S. BANK**

paid, companies typically save up to 4% of their freight payments, Pape says. One customer in the auto industry, for example, was able to take eight full-time employees and move them into more strategic roles within supply chain operations.

Both shippers and carriers can access U.S. Bank's freight payment network across all transportation modes. Each party gains assurance and predictability on the payment of invoices.

In its approach to freight payment, U.S. Bank focuses not just on technology, but on building collaborative relationships. An example is its "Voice of the Customer" program, through which U.S. Bank brings together shippers and carriers. Over the course of several days, they can share thoughts on the market, discuss best practices, and hear from industry leaders.

"They're all in the same room, talking and sharing ideas," Pape says. "We've found it to be incredibly insightful." The exchange of ideas and information helps

bolster all the relationships, he adds.

While the program has moved to a virtual format due to the pandemic, Pape says that all are looking forward to the day when they can reconnect in person.

U.S. Bank also offers a benchmarking solution through which shippers can evaluate their performance against a peer group. U.S. Bank provides insight and recommendations to help them improve their efficiency in specific regions of the country and on specific lanes. This might include switching lanes or shipping from a different destination to cut travel time and costs, or even assessing the pros and cons of locations for future distribution center locations.

"Companies use this insight not only to drive efficiencies into their process, but also for logistics planning," Pape adds.

#### A TRUE WORKING CAPITAL SOLUTION

As a bank, U.S. Bank is able to offer trade finance capabilities that provide both shippers and carriers with a true working capital solution. Shippers can extend their days payable outstanding for up to 90 days, while their carriers are paid upon invoice approval, which is typically fewer than two days.

And because it is a regulated financial institution, U.S. Bank continually monitors trade, payment, and other regulations to ensure its ongoing compliance.

For instance, it ensures that all trading partners, including carriers, are registered with SCAC (Standard Carrier Alpha Code) identifiers issued by the National Motor Freight Transportation Association and cross-checked against the Office of Foreign Assets Control and Office of the Superintendent of the Financial Institutions in Canada, as well as known terrorist entity lists to ensure the legitimacy of the business.

These steps help mitigate the risk of fraud, Pape says, and help ensure that its customers are paying the right people, at the right time. ■



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