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Transforming Trinity Logistics with Back-office Automation

Trinity Logistics cuts cost up to 90% with Kapow Katalyst.™ Focusing staff on exception handling yields benefits in efficiency and cash flow.

Overview

Trinity Logistics
Seaford, Delaware

Industry
Third party logistics provider

Solution Areas
- Process Automation
- Application Integration

Challenge
- Integrate with hundreds of carrier, payment processor, and supplier websites
- Reduce the cost of handling manual transactions on B2B portals
- Increase staff efficiency

Solution
- Kapow Katalyst integrates Trinity's internal systems with systems outside their firewall
- Katalyst captures essential documentation from carrier websites to speed the shipment completion process
- Routine shipments can be closed out automatically, accelerating cash flow

Results
- Trinity staff focuses on handling exceptions, not carrying out manual activities, improving margins
- Enabling staff to work on revenue-generating activities improves top-line growth
- Improved cash flow further accelerates Trinity's business

Trinity Logistics, a top-20 U.S. provider, offers a full range of logistics services that include full truckload, LTL, intermodal, and freight management. They tailor unique solutions for every logistics challenge by creating a consultative relationship with each client.

The Challenge

Like all 3PLs, Trinity Logistics creates logistics solutions designed especially for each client—which requires integration with the IT systems of the shippers, carriers, and service providers that form each client's unique solution. Trinity needs access to the data held in all of those systems—data such as invoices, proofs of delivery, and other vital documents used to capture new loads, submit and pay invoices, and monitor shipment status. But many of these systems are merely web sites or B2B portals that offer no integration points, and even when integration via technology such as EDI or APIs is available, Trinity has found this kind of integration expensive to build and inflexible to use.

Trinity's initial approach was to assign staff to access these outside systems and integrate them manually by keying transactions and copying data from one system to the next—an approach common to 3PLs. However, The direct cost was very high, and robbed Trinity of resources that could be used to create new business instead. They looked for a better way.

The Solution

Trinity Logistics found their solution in Kapow Katalyst. After hearing a customer testimonial, Trinity built a pilot implementation to automate a portion of their LTL business, where several headcount were devoted to manually closing out just a small number of LTL shipments per month.

Trinity began by automating the capture of Proof of Delivery documents from each carrier's website in preparation for invoicing, and expanded their integration to include the subsequent steps in the process. Even though Trinity has completed only a small part of its ultimate project the results have already been dramatic.

> " Trinity Logistics has recouped twice our investment in Kapow Katalyst with our initial project. We have automated processing of Proof of Delivery documents, Bills of Lading, carrier invoices, and other shipping documents, enabling us to refocus several headcount on exception handling and other high-value work instead of manual website updates."
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> — **Doug Potvin,** CFO, Trinity Logistics

> " With Kapow Katalyst, Trinity Logistics will be able to reach several key financial measures of growth years faster than originally planned. We are deploying automation in dozens of significant projects across the organization, and we will depend on Kapow Katalyst to help us transform Trinity Logistics as we execute our business plan."
>
> — **Doug Potvin,** CFO, Trinity Logistics

The Results

Trinity's first project enables the company to close out some 95% of supported LTL shipments without any manual effort. Kapow Katalyst automatically accesses the carrier website to capture each shipment's PRO number, track/trace information and invoice amount. Katalyst then integrates with Trinity's operating system to validate this data—and only if Katalyst detects a discrepancy will an exception be raised for manual review.

A few days later, after the carrier has generated all necessary documents, Katalyst again accesses the carrier website. This time, Trinity captures the Bill of Lading, carrier invoice, and other final documents and moves them into Trinity's operating system. Additional validation is performed, and as before only discrepancies will raise an exception. Katalyst even moves documents directly into Trinity's OCR subsystem, eliminating the manual scanning of PDF documents by converting them into a scanner-friendly format.

Even before the full LTL solution has been rolled out, the dramatic reduction in workload enabled Trinity to redeploy several staff into higher-value work. The company's goal is to handle every order in their LTL business with no more than one manual touch—and the project took only 3 months to build.

The Future

Trinity continues to find new ways to integrate and automate across the company. For example, it has begun to integrate Salesforce CRM with its other operational systems, with the goal of automating customer-facing processes as diverse as lead generation, credit clearing, and master data management.

Another item on the company's growing to-do list is to automate intermodal pricing. Trinity plans to eliminate the current manual process by integrating price data from multiple websites so it can quote the best possible prices—and it may even offer the consolidated data to its own customers as an additional differentiator.

Finally, as Trinity accelerates payment processing it expects to improve measures such as Days Sales Outstanding, and to reach several key growth measures much more quickly than previously planned—as Kapow Katalyst helps Trinity Logistics transform its business.

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About Kapow Software

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