

2024 and Beyond



**A Drayage**

**Carrier's**

**Guide to**

**Success**

**A simple step-by-step guide to help you:**

- Improve customer satisfaction & retention
- Boost operational performance & internal productivity
- Enhance employee morale
- Grow your business & increase profit margins

## WELCOME

Being a drayage trucking company in today's economy is no easy feat. We get it. You've worked hard for years building your business – pre and post pandemic. Many of you share how it's tougher than ever to operate with razor thin margins and manual processes. In order to succeed in 2024 and beyond, carriers need to do whatever it takes to improve operations – and for many of you, the competition is already proving difficult.

At PortPro we feel your pain and can help you overcome some of your biggest obstacles. We took our decades worth of experience working directly in the business and built technology to tackle manual processes. Whether you want to expand into new markets, achieve substantial growth, streamline existing processes to run more efficiently, or simply run a sustainable and profitable business, this guide is designed to help you achieve success on your terms.

Before we dive in, here are some tips to help you make the most of this Guide.



### PRINT THIS GUIDE

Print a copy of this Guide and feel free to write in it. Or, you can download this file and type your answers directly into it.



### COMPLETE THE EXERCISES

Answer the questions in each section. This will help you determine where you stand as a company, and help define areas to improve.

**Start Here...**

**What are your top 3 goals as a company this year?**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Ask Yourself...	YES	NO
Are inefficiencies in your operation causing you stress?		
Are user errors costing you money (like demurrage & per diem)?		
Are customers leaving you for carriers with cheaper rates?		
Do you find yourself struggling to win new business?		
Are you ready to focus on improving your operational efficiencies?		

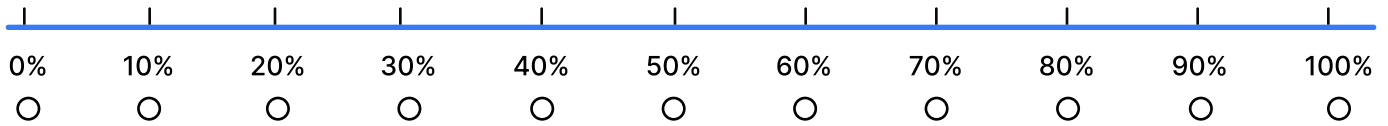
If you answered YES to any of the above questions, continue reading our guide and answer each question to identify opportunities for improvement within your operations.

# 8 STEPS TO **SUCCESS** IN 2024 AND BEYOND

We've identified eight key strategies to drive transformative changes in your company.

## 1. Connect Via API & EDI to as Many of Your Customers as Possible

What percentage of your customer base today are you integrated with via EDI or API?



With API & EDI connections you can automate:

- Entering orders into your system
- Updating customers on the status of their loads
- Sending invoices to your customers
- Sending documents to your customers
- And more...

You should be integrated with as many of your customers as possible to avoid time-consuming order entry, manual updates, and human error.

### Think about it:

- How much time does your team spend manually inputting orders?
- How much money did your company lose due to clerical errors (ex. your employee forgot to enter an order into your system resulting in demurrage)?
- How often is the wrong container number entered when entering an order?
- How much time do you spend going back and forth with your customer via email and phone calls to update them on their status?

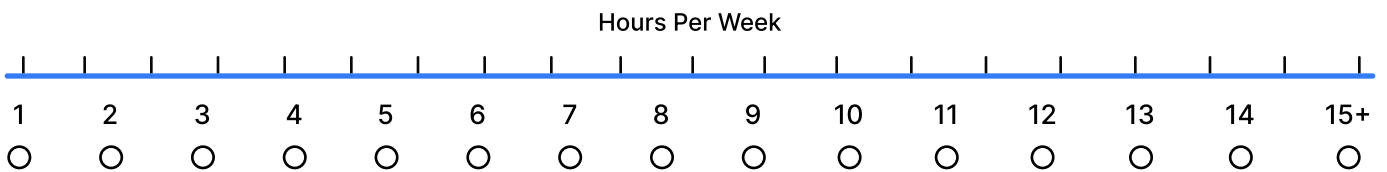
### Eliminating these simple tasks will:

1. Reduce time and money spent doing repetitive tasks
2. Reduce errors associated with manual entry
3. Improve communications, and ultimately your relationship with customers, making them happier and loyal. Customers appreciate their improved operations - reducing the back and forth, time and money they are currently spending.

## 2. Automatically Send Email Notifications & Reports to Your Customers

Do your customers request reports on a daily, weekly, or monthly basis? If they do, how do you manage and provide those reports? How much back-and-forth communication is involved?

What is the time commitment for you or your team in updating customers on these situations or sending out reports?



How do you inform your customers about the following situations today?

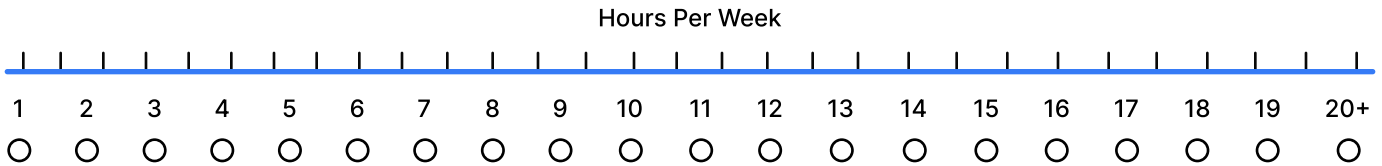
- Delays in the driver's schedule
- Shipment delays
- Location of containers
- Updates on the status of loads
- Containers that may incur per diem
- Holds on container

If you aren't providing updates, or if it's done manually, you are doing yourself a disservice. We strongly advise automating these processes. If you are not using a TMS, we recommend you consider adopting one, and if you are using a TMS - ensure that it has automated email notifications and reporting capabilities. This allows you to schedule your notifications and reports to be sent — eliminating the need for manual intervention.

By automating these processes, you increase efficiency, keep your customers well-informed, and free up valuable time that can be redirected to other aspects of your business. It's a mutually beneficial scenario for you, your team, and your customers.

### 3. Automate your Appointment Scheduling Process

How much time do you spend each week manually booking & monitoring terminal appointments on terminal websites?



If you answered 1 hour or more each week, consider automating this process. We suggest booking and managing your terminal appointments within the same system (used for load management). This approach offers two key advantages:

**1. Consolidate and Centralize:**

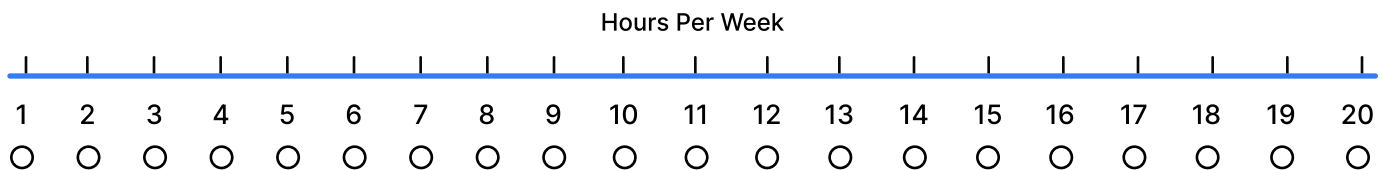
Eliminate the need to log into multiple websites to book & manage appointments, and then transfer that information back and forth into the location you are managing loads.

**2. Operate More Efficiently:**

Manage your loads from one location. You should book and manage appointments from one place so you can receive instant updates on your appointment status, and make decisions on which drivers to dispatch loads.

### 4. Transition To A Fully Electronic Documentation Workflow

On average, how much time does your team spend per week scanning documents (PODs, TIRs, etc.) and attaching them to emails?



How quickly can you send your customers an invoice with all the load documentation after the load has been completed?

- Instantly
- Same Day
- Next Day
- Within 1 Week
- 2 or More Weeks

If you answered more than 1 hour a week, or if you are NOT invoicing your customers “next day” because you are waiting on documents from the drivers, then this can be a huge area of improvement.

### How electronic documentation works:

1. Use a system that has a good driver mobile app which prompts the driver to scan in documentation.
2. Documentation instantly reflects in your system after scanned in by the driver
3. Automatically attach documents to invoices being sent out from your system

### Benefits of moving towards electronic documentation:

1. Invoice customers faster
2. Cut back on time spent scanning and uploading documents
3. Remove unnecessary trips to your office for your drivers
4. Eliminate the need for documents to be stored on your computer

## 5. Give Your Customers Access To A Customer Portal

Do you give your customers access to a Customer Portal that is in an easy-to-use, centralized location with real time visibility of their loads with you?

YES  NO

If you answered YES:

Are you able to customize permissions in the customer portal, allowing you to selectively share information based on your preferences?

YES  NO

Can you personalize the customer portal with your company's logo and colors, creating a branded experience that aligns with your identity?

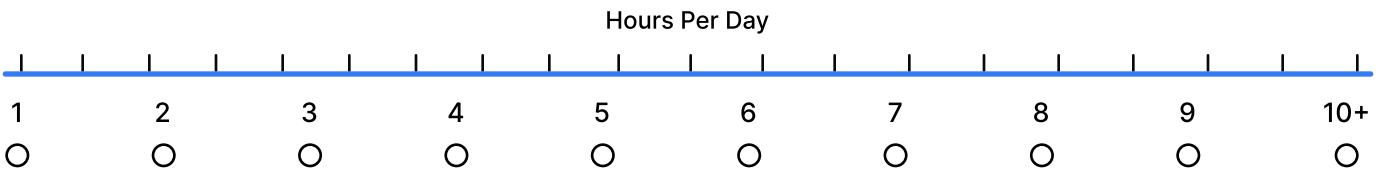
YES  NO

**Here’s what a good customer portal achieves:**

- Recognize the diverse preferences of each customer by offering flexible options such as direct API/EDI integrations, automated emails and reports, individual logins, or a combination.
- Provide your customers with a dedicated portal for real-time visibility into their loads, status updates, document viewing, and billing details. Tailor the permissions to control the level of information shared.
- Enhance customer satisfaction and gain a competitive edge by offering a personalized portal, a feature often overlooked by many drayage trucking companies. This will make your company the preferred choice for customers.
- Streamline communication and reduce the back-and-forth with customers through calls, emails, and texts. This allows your team to focus on providing additional value, building relationships, and driving sales.

**6. Automate Container Tracking**

On average, how much time do you spend leaving the system or spreadsheet where you manage your loads, to check terminal websites for container availability?



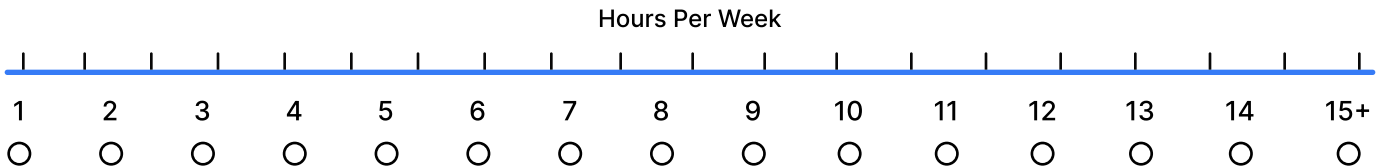
If you answered 1 or more hours per day, this area should be a top priority to improve.

Time spent going back and forth between systems is wasted on unnecessary, manual processes. If you utilize a system that automates container tracking in the same platform used for load management and dispatching, you can eliminate the need for your Order Entry and Dispatch teams to manually check multiple websites throughout the day.

This workflow allows you to be proactive — and stay informed about essential dates such as the last-free day — reducing the risk of unnecessary per diem and demurrage fees.

## 7. Automate Customer Rates

How much time does your team spend manually identifying and typing rates into your customer's invoices?



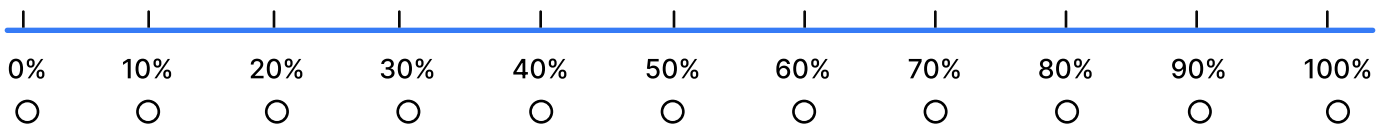
If you aren't already, you should automate your customer rates. In whatever system you use, you should be able to set up and standardize your customer base rates & accessorials. Your system should automatically populate those base rates & accessorials on your invoices based on the conditions you set.

### How electronic documentation works:

1. Saves your team valuable time from having to manually calculate and add in these line items.
2. Ensures that you charge the correct and full amount to your customers. How much money are you leaving on the table because you didn't charge for storage or prepull? Make sure you collect the correct amount.

## 8. Dispatch More Efficiently To A Driver Mobile App

What percentage of your dispatchers day is spent going back and forth with drivers on their load assignments?



How do your dispatchers communicate with drivers and dispatch to them?

- Text    Call    WhatsApp    Driver Mobile App

If you answered more than 10% per day, or anything other than communicating via a Driver Mobile App, this is an area to improve efficiency in your dispatch operations.

Improve efficiency by dispatching through a driver mobile app, reducing the need for extensive text communication. Essential load, routing, and schedule details are readily available, minimizing unnecessary back-and-forth. This leads to fewer dry runs, decreased errors, a detailed location history for monitoring waiting times and charge confirmation, and a communication audit trail with drivers.

Drivers prefer modern driver apps to better streamline dispatch workflows so they can:

1. Receive and access their dispatch assignments with all details anytime on their phone
2. Reduce check-ins with dispatchers through automated real-time status updates
3. With this permission enabled, view their load rate and accept or reject assignments
4. Use an in-app truck route GPS navigation for optimal directions
5. Access past, current and future settlements to review and audit
6. Instantly message dispatch without the need for personal texting or WhatsApp
7. Review past loads with access to load documents and details
8. Upload, manage and view equipment documentation

## IN CLOSING...

We hope you find **PortPro's Guide to Success in 2024 and Beyond** to be your strategic resource to navigating the eight key strategies that will help drive transformative changes in your business.

It begins with you... your commitment to making positive changes. And we're here to help you every step of the way with the right tools and technology to make you more competitive than ever.

Start your journey to success with a demo here — <https://www.portpro.io/request-demo>

Want to chat with one of PortPro's drayage experts? Send an email with your contact information to [sales@portpro.io](mailto:sales@portpro.io).



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