

CASE STUDY

Transportation Provider Grows its Business without Increasing Headcount.

This transportation provider harnessed Kofax RPA™ to cut the time taken to book deliveries from hours to minutes. Today, the company is processing 25% more delivery appointments a week without any increase in headcount, getting more business on the books while maintaining healthy margins.

83%

**FASTER SCHEDULING FOR
DELIVERY APPOINTMENTS**

25%

**INCREASE IN APPOINTMENTS
SCHEDULED PER WEEK**

24 hours

**TO LAUNCH A NEW ROBOT
INTO PRODUCTION**

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ABOUT THE COMPANY

This transportation company provides freight, truckload and logistics services in the United States and around the world.

PRODUCTS IN USE

Kofax RPA™

FOCUS

Digital Transformation
Robotic Process Automation (RPA)
Web Data Extraction

CHALLENGE

When your customers expect deliveries to arrive on time, every time, the margin for error is razor-thin. Any delays or mix-ups during delivery-appointment scheduling could lead to missed timeslots and even the loss of a customer's business for good.

As one of the biggest transportation providers in the United States, this company knows exactly how important it is to get delivery scheduling right.

A spokesperson explained, "We work with an increasing number of customers who operate a just-in-time strategy, and have stock delivered as and when they need it. This means we have a very small window—often just an hour or two—to make a delivery."

Scheduling these delivery appointments is a complex task. On any given day, teams must work through a list of orders from multiple customers, determine the priority for scheduling deliveries for each account and then pick a slot that fits within the customer's requested time frame.

The spokesperson added, "To get appointments booked, teams would have to visit a client's website or call them up by phone to check what slots are available for goods to be picked up or delivered. At the same time, they had to cross-check our own systems to obtain purchase order information, truck locations, driver availability, and so on, to make sure we could fulfill a specific order. Once all of this was done—and it took a lot of going back and forth between different webpages and applications—our staff set the appointment with the customer, received a confirmation and finally entered the confirmed appointment into our system of record.

"In the past, it could take anywhere from 30 minutes to five hours to schedule an appointment. With Kofax RPA we have cut the time taken to set up an appointment to just five minutes on average—and we can even schedule some deliveries in as little as half a minute, which is just incredible."

Spokesperson, transportation provider

"As the process was so complex, it could take anywhere from 30 minutes to four hours to book just one appointment. What's more, because it took so long to gather all the details needed to schedule a delivery, by the time staff came to confirm a slot, sometimes it was no longer available. So, we'd have to start the process all over again, taking up more time and effort. On top of that, relying on teams to check information manually and input it into various systems created a risk of errors occurring, which could lead to further delays and issues with deliveries."

To maximize its chances of booking optimal delivery appointments, the company looked for a solution that could help it manage scheduling more quickly and accurately.

SOLUTION

The transportation provider found the answer to its challenges in Kofax RPA™, a robotic process automation solution. With Kofax RPA, the company has built dozens of robotic process flows, which it uses to streamline the manual task of gathering, inputting, and validating data from multiple sources, including both external web portals and internal systems.

"Right now, we have more than 70 Kofax RPA robots managing the appointment-scheduling process, and we're adding more than seven new robots a month," said the spokesperson. "It's been very easy to get to grips with using Kofax RPA; today, it only takes us about 24 hours to develop a new robot and bring it into production."

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The company uses Kofax RPA to extract data automatically from a range of vendor website portals and import the information into its core transportation management system.

“We just put Kofax RPA out there and it does a little one, two, three punch and grabs all the information we need right off the web,” noted the spokesperson. “Our staff no longer have to go back and forth across multiple webpages to hunt down that data, Kofax RPA does all the hard work for them—and much faster than a person ever could.”

In addition, the company has worked with delivery management teams to create a series of business rules for appointment scheduling, such as pick-up or drop-off locations, requested delivery time slots and more.

Kofax RPA uses these rules to select a suitable appointment for each order. In cases where the solution is unable to fix an appointment that meets the required parameters, it will forward the order to an exception queue, where a human operator can pick up the item and complete the scheduling.

The spokesperson stated: “We worked very closely with our business users to establish the rules for appointment scheduling as they know the process inside-out and have the best insight into what factors need to be taken into consideration when setting up an appointment.”

Following its success in using Kofax RPA to automate delivery appointment scheduling, the transportation provider has harnessed the solution to streamline invoice reporting.

The spokesperson explained, “Our accounts payable [AP] team produces weekly invoicing reports to help management understand where we stand in terms of which invoices have been paid, which ones are still pending, and which ones have been canceled.

“Before, in order to compile a report, AP staff had to visit two separate web portals to obtain the invoicing figures, then manually merge that information into a separate spreadsheet, which was sent to AP management. With people having to pull data from different sources and compile it manually, errors did occur, meaning that the team spent a considerable amount of time on re-work.”

“Unlike a human operator, who will naturally need to take breaks and who will sometimes make mistakes, Kofax RPA can just keep going for as long as we need it to.”

Spokesperson, transportation provider

He continued, “Today, we have automated this process with Kofax RPA. Robots go out and extract all the data from the web portals, merge the information and populate the spreadsheet. Our AP team just has to review the final report before sending it out.

“The new approach has saved so much time around reporting. While it used to take around four or five hours for the AP team to compile an invoicing report manually, with Kofax RPA it’s all done and dusted in less than an hour. We’re also seeing far fewer discrepancies and exceptions in the reports now that everything is automated, which means that people really trust the figures. And by freeing up all those hours that the team used to spend tracking down data and crunching numbers, our people can focus on more valuable work, like following up one-on-one with customers who have questions or issues that need to be addressed.”



RESULTS

Kofax RPA is a welcome addition to the company’s software landscape. The spokesperson commented, “Kofax RPA has allowed me to take all the technical knowledge and experience that I’ve built up over my career and use it to deliver something new that has made such a positive impact in my department and across the company as a whole. I’m also learning new things from Kofax RPA all the time, which is another great benefit.”

Introducing Kofax RPA has enabled the transportation provider to bring newfound speed and accuracy to appointment scheduling—helping the company get more business on its books.

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The spokesperson remarked, “The obvious advantage with Kofax RPA is that it is constantly out there interacting with systems, extracting data, and setting up appointments, much faster than a person ever could. And unlike a human operator, who will naturally need to take breaks and who will sometimes make mistakes, Kofax RPA can just keep going for as long as we need it to.

“We’ve seen some remarkable improvements since introducing Kofax RPA. In the past, it could take anywhere from 30 minutes to five hours to schedule an appointment. With Kofax RPA we have cut the time taken to set up an appointment to just five minutes on average—and we can even schedule some deliveries in as little as half a minute, which is just incredible.

“Because the process is so much faster, we are now able to book a much greater number of appointments than ever before. Previously, we averaged around 1,200 appointments a week; today, we are scheduling more than 1,600 appointments. That’s a 25 percent increase in capacity, and the more jobs we book, the more revenue we’re bringing in, so we can absolutely say that Kofax RPA is helping drive growth for us.”

Importantly, with Kofax RPA taking on much of the burden of tedious and time-consuming data gathering and data entry work, teams have been freed up to focus on more value-added tasks.

The spokesperson said, “When we first introduced Kofax RPA, it didn’t exactly receive a warm reception from everyone—there were quite a few people who feared that the software was going to make them redundant. Obviously, that was never our intention, and now that our teams have had a chance to see how Kofax RPA works first-hand, they have really taken to the solution.

“We haven’t replaced any jobs, we’ve just replaced repeatable manual tasks that were burdening our staff. Now that Kofax RPA is picking up most of the routine work that used to occupy a great deal of our operators’ time, people have a much better work-life balance, and they can spend more time on activities that are rewarding and add value to the company. In particular, our teams can now focus on those one-on-one client interactions that make for a better customer experience.”

He concluded, “Kofax RPA has helped us to really raise our game—in terms of both running a faster, more efficient business and providing a very high level of service to our customers. We look forward to building on this foundation to drive our business towards even greater success in the future.”

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