

# 3PL Gains a 360 Degree View of Business and Capitalizes on Opportunities

## Client

A 20+ year old asset-based third-party logistics provider (3PL) providing both brokerage & freight management and asset-based services of dry van, refrigerated and dedicated/private fleets. They manage over 85,000 shipments for more than 600 customers from various industries using multimodal transportation. With multiple office locations in the US, the client serves customers in the United States, Canada, and Mexico.

## Business Challenges

The client had procured several off-the-shelf systems to help run their business.

- On-premises systems (McLeod TMS Systems, McLeod Imaging, ShoreTel VoIP)
- Third party cloud systems (BlueGrace, Salesforce, EFS, PeopleNet)
- Flat File (Budget Data)

The off-the-shelf systems contained large volumes of transactional data, and operational reports from these systems were meant to run everyday business. They were unable to provide analytical reports and strategic insights that allow executives to manage the business. These isolated systems contained data silos, hampering a unified view of the business.

Users received different and unverified data, creating inaccurate insights that led to lost revenue opportunities. Executives and mid-level managers spent hours struggling with spreadsheets to understand their department's performance. Strategic analytical reports were done manually, and led to costly errors, subsequently leading to potentially wrong assumptions for the company's planning cycles.

Switching back and forth between different applications complicated tasks and led to performance issues. Organizationally, without having a single unified view of the business, the client did not have an insight into their operations and was unable to transform their business.

## Solutions

Trigent studied the eight existing applications and their data sources. Based on the discovery, suggested a scalable, comprehensive, and robust business intelligence solution that would help the client to derive

consolidated analysis as well as intelligence by accessing data scattered across different data sources.

## Reduced analytical report production

time by **85%**

Trigent Data Scientists and BI Engineers understood the KPIs, key metrics, formats and veracity of various data sets, reports, dashboard, and planned a roadmap for implementing a solution. Trigent built a Business Intelligence (BI) application to identify new opportunities and optimize processes.

- **The Source System:** Transactional systems from where the data needs to be extracted to a Data Mart Layer. Data from the cloud were extracted using API or data connectors. Implemented the Extract, Transform and Load (ETL) process to help loading the Flat Files to the data mart server. For all the on-premises applications, data extraction was done from the databases.
- **Data Mart Layer:** A scalable, flexible layer used as 'Single Source of Truth/Data' to accommodate all analytical queries. Data from transactional systems were collected, cleansed and validated.
- **BI Server:** A repository for all reports and dashboards. Users can access these reports via browser or mobile applications. Role-based data security was also set up.

## Technology Stack

- **Platform:** Tableau 10.5, SQL Server Integration Services (SSIS), SQL Server Reporting Services(SSRS), SQL Server Data Tools (SSDT), Visual Studio 2015
- **Database:** MS SQL Server 2014

## Benefits

- Centralized and structured data control.
- Data visualizations and ad hoc reporting - created accurate reports and alerts.
- Disciplined data gathering resulted in better metrics and well defined KPIs.
- Data-driven business with advanced analytics.
- Reduced reporting time, increase in data reliability.

- **Presentation Layer:** This layer was used for creating workbooks, to view dashboards, data sources, and then publish the content to the server.

The new BI system:

- Eliminated data silos, connected isolated data, and presented a unified view of business for improved strategic decisions.
- Streamlined the work process, delivered interactive reports, dashboards, and charts to decision makers resulting in department-level agility, data consistency.
- Tracked the activities of sales and carriers via scorecards - Salesperson Scorecard and Carrier Sales Scorecard - which provided a 360-degree view of interaction and performance.



Improved  
operational efficiency



Generate  
higher margins



Cross-functional  
visibility

“Trigent's solution enhanced communication throughout the company with a single source of the truth. The solution provides a centralized view of our business data, enabling us to make better decisions and increase our sales.”