



### **Transportation**

1. What are the company (or site) name, street address, city, state, & zip code?  
(List of Locations)
2. What is the estimated annual transportation spend by mode?
  - a. LTL
  - b. Truckload
  - c. Parcel
  - e. Air
  - f. Ocean
  - g. Expedite
  - h. other (please describe)
3. What is/are the product(s)?
4. What is/are the actual freight class(es) being shipped? (LTL only)
5. What are the NMFC numbers on the products being shipped?
6. How are the products packaged for shipping? (Pallets, Cartons, Master Packs)
7. How are the packages labeled?
8. Will the freight be palletized/shrink-wrapped/corner boarded?

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9. If the freight is palletized, what are the dimensions?
10. If the freight is palletized, are the pallets stackable?
11. If the freight is palletized, can it be broken down?
12. Is any of the freight hazardous?
13. What are hazardous classes, UN numbers, package groups?
14. Is MSDS information available?
15. Is special equipment required? (Dry Van, Reefer, Flat Bed, Single Drop, Double Drop, Swing Doors)
16. Will a dock be available for loading at each origin/destination?
17. Are all sites live unload?
18. Will driver need to assist with loading/unloading?
19. Is wait time involved with loading/unloading?
20. How long does it take to load/unload trailers?
21. Are all deliveries live load/unload or will drop trailers be necessary?
22. If drop trailers necessary, how many days does a trailer sit empty on the lot?
23. Will pick-up/delivery appointments be required?
24. Is inside delivery required for any location?
25. If inside delivery required, is one or two man required?
26. Are any other "white glove" services required? (e.g. uncrate/assemble/package removal)
27. Are lift gates required for any pickups or deliveries?
28. Are there any carriers your clients will not do business with?
29. Where do freight bills get sent?
30. Are there any required pieces of information that need to be captured on a freight bill for reporting purposes?
31. Is there a seasonal element to shipping patterns?
32. How is LTL pricing structured? (e.g. FAK pricing on a Czar Lite tariff)

### **Order Flow (Outbound)**

The goal of these questions is to understand the overall process starting with receipt of a sales order from customers through shipment of product. Please feel free to elaborate and provide additional information to supplement your response.

- (1) How are sales orders received today? (phone / fax / email / EDI)
- (2) What is the ship-date commitment made to a customer (orders received by noon will ship same-day / etc)
- (3) What system(s) are involved when capturing a sales order?
- (4) What system(s) are utilized in the shipping department? WMS / ERP / None / Other?
- (5) How is a ship-order communicated to the shipping department?
  - a. Is there an electronic message delivered to a WMS?
  - b. Does the shipping team log into the Order Management system?
  - c. Other?
  - d. Are orders dropped in batches? Other? (Please elaborate on timing and/or trigger)
- (6) Please describe the process of pick / pack / staging product for shipping:
  - a. How do warehouse personnel receive a pick-ticket?
  - b. How do personnel know where to stage product?
    - i. Does WMS/ERP provide instruction? If so, is this based on the transportation routing plan?
- (7) At what point is accurate shipment information available for a shipment plan? (Receipt of sales order? When product is picked / staged? Other?)
- (8) How is carrier selection done today?
  - a. Is this selection done prior to the pick process? If no, when?
  - b. Who makes the selection?
  - c. Is there a routing guide in place?
  - d. How is mode and/or service level determined?
- (9) How are carriers contacted for pickup today?
  - a. When in the process is a carrier notified? (Morning / afternoon / day before / other?)
  - b. Are there any carriers that show up daily (repeating schedule)?
  - c. How is the tender or assignment communicated to the carrier? How is the tender – acceptance / decline communicated back to the plant?
- (10) Do you accept drop trailers? Or, live-load?
  - a. If combination, please elaborate which carriers / modes
  - b. If you have drop trailers, how do you know which carriers have trailers in the yard?
- (11) How is a bill of lading created today? What system(s) are used?
- (12) Do you require appointments for pickup?
  - a. If yes – how is this managed? Who is the owner of the process (role)?
- (13) Do you receive status updates from carriers on active shipments?
  - a. If so, please explain (web / EDI / other)?
- (14) Do you frequently request proof-of-delivery? If yes, what is the common method to receive this information?
- (15) Can you elaborate on exceptions processes for the following scenarios:
  - a. Product allocated to a shipment is not available – how is the shipping plan modified and communicated?
  - b. There are no carriers available for pickup – is there a spot-buy process? Are expedite carriers contacted? Other?
  - c. There is a change while shipment is en route (re-consignments / appointment requirements / etc) – who is contacted for disposition? What is their primary role?
- (16) What are your shipping hours?

### **Inbound / Purchase Order Flow**

The goal of these questions is to understand the overall process starting with purchase order release through receipt of product. Please feel free to elaborate and provide additional information to supplement your response.

- (1) How is the requirement for product identified?
  - a. What systems are involved (MRP / Other?)
- (2) Please describe how purchase orders are issues to suppliers:
  - a. What systems are involved?
  - b. How do suppliers receive PO's (EDI / Phone / Fax / etc)?
    - i. Please include the most common

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- c. Do suppliers fill against a blanket PO, or against discrete PO's / PO Releases?
- (3) How does a supplier confirm receipt of purchase order?
  - a. How does the supplier indicate from which facilities the product will be sourced?
- (4) How do suppliers know how to route the shipments?
  - a. Do they receive routing / carrier instructions with the PO?
  - b. Are there regular scheduled pickups / routes?
  - c. Who contacts the carriers to make pickups?
    - i. How much lead time are carriers given?
- (5) Do suppliers ship multiple PO's on a shipment, where applicable?
- (6) Do suppliers ship multiple shipments against a PO (where applicable)?
  - a. Back-orders / orders that exceed capacity of trucks / etc?
- (7) How is a purchase order add/change/delete message communicated? (Phone / fax / EDI / other?)
  - a. Please describe most common.
- (8) Do you receive ASN messages from the supplier?
  - a. If yes, what receiving and/or tracking processes does the ASN trigger?
  - b. If yes, what format (EDI / other?)
- (9) Are status messages received for inbound shipments?
  - a. If yes, what method of communication (phone / EDI / other?)
- (10) Do you require appointments for delivery? If yes, who handles this (role)?
- (11) What are your receiving hours?
- (12) Are deliveries live-unload? Drop trailers?

### **Systems and Technologies**

The goal of these questions is to understand key systems that are being utilized. Some questions may be redundant to information requested in prior sections. If you have already elaborated on any of these points, please feel free to reference those answers.

- (1) What systems do you employ to facilitate the operations? Are these systems integrated with other operational systems (i.e. – MRP and planning/scheduling, etc.)? Provide a brief explanation.
- (2) Are your systems predominantly legacy systems (home-grown), ERP or a mix?
- (3) On what platform(s) do your systems operate (e.g., mainframe, AS/400, PC, Client Server, ASP, etc.)?
- (4) Describe any IT systems that are used for managing your carriers (e.g. cost tracking, load tracking, etc.):
- (5) Describe any IT functions or systems that have been outsourced:
- (6) Do you have electronic ordering capabilities with your suppliers?