AN EXAMPLE TRAIL MAP

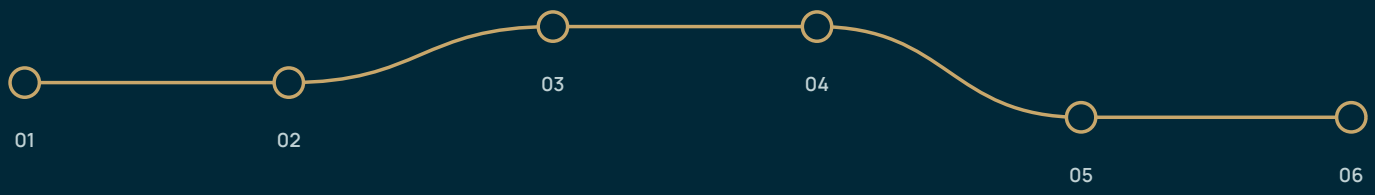
# Give every load change an owner.

A Trail Map (the reviewed report format) from load tender and appointment through dispatch, proof of delivery and freight-bill readiness.

## Mesa Freight Coordination

A fictional US freight coordinator, assessed within one regional full-truckload desk.

THE SIX-STEP TRAIL




Load tender received by the regional desk TO POD and approved charges accepted as freight-bill-ready

This fictional sample shows the format and reasoning. Every record and operational figure is authored; pilot targets are proposals to test. In a paid assessment, a named analyst reviews and signs off every finding before delivery.

Explore the interactive report

01 / DECISION AND BASELINE

# Start with a decision.

Mesa's load changes are visible in messages but not consistently reflected in the accepted plan or billing evidence. Appointment changes, proof of delivery and accessorial authority need separate owners and records. Start with the handoff that keeps the carrier, customer and billing desk aligned.

RECOMMENDED FIRST MOVE

**Pilot acknowledged appointment changes, linked proof of delivery and explicit accessorial approval on one regional desk. Keep carrier acceptance and commercial authority with authorized people.**

ILLUSTRATIVE BASELINE / AUTHORED DATA, NOT MEASURED CUSTOMER RESULTS

## 10.5 business hours / load

### Delivery-to-bill-ready time

Elapsed time from recorded delivery to an accepted freight-bill-ready pack.

**504 business hours / 48 completed loads = 10.5 hours.**

Includes document waiting; it is not transit time, dispatcher labor or days to payment.

Source E01

## 13 of 48 completed loads

### Appointment changed

Loads with at least one revised pickup or delivery appointment.

**13 changed-appointment flags among 48 load IDs.**

A change is not automatically a failure. Check who received and accepted the revision.

Source E02

## 7 of 48 completed loads

### POD missing at first review

Loads without the required proof of delivery in the first billing pack.

**7 missing POD flags among 48 loads.**

Authored example; compare the same cohort definition in a real pilot.

Source E02

## 5 of 9 accessorial requests

### Shipper approval missing

Accessorial requests without the required shipper approval evidence.

**5 unapproved requests among 9 accessorial requests.**

The denominator is requests, not loads; approval must be checked against the agreed commercial terms.

Source E05

02 / FOLLOW THE HANDOFFS

# The work, before and after.

In scope: One legal entity, one regional desk and full-truckload coordination. Tender, appointment, carrier dispatch, proof of delivery and accessorial evidence. Load changes and the handoff from operations to freight billing.

## CURRENT TRAIL

### Receive load tender

Load planner / TMS tender

Record lane, equipment, commodity and customer reference.

### Set the appointment

Appointment coordinator / Email + facility portal

Book the slot; a later change can live only in a message.

### Dispatch the carrier

Carrier dispatcher / TMS + carrier message

Pass the plan and revised instructions to the accepted carrier.

### Track the exception

Operations desk / Load notes

Record changed appointments and accessorial requests while the load moves.

### Collect delivery proof

Document coordinator / POD inbox

Find proof of delivery and link it to the completed load.

### Prepare the freight bill

Freight billing analyst / Billing workbook

Match tender, POD and accessorial authority before billing readiness.

## PROPOSED TRAIL / PILOT DESIGN

### Confirm the tender

Load planner / Accepted load record

Retain accepted requirements and the unique load reference.

### Version the appointment

Appointment coordinator / Appointment log

Record old and new time, facility and the reason for change.

### Acknowledge the change

Carrier dispatcher / Dispatch confirmation

Retain the carrier acknowledgement of the current plan.

### Own the charge decision

Operations desk / Accessorial queue

Record charge basis, shipper authority and pending decision.

### Reconcile the POD

Document coordinator / Linked delivery evidence

Check load, location and required delivery evidence before closure.

### Accept bill readiness

Freight billing lead / Supported freight pack

Reconcile approved charges and POD to the accepted tender.

Outside scope: Carrier qualification, safety certification and route optimization. Cargo claims, rate procurement, bill payment and collection.

03 / INSPECT THE AUTHORED EVIDENCE

# Evidence before interpretation.

Four authored working weeks; 48 completed loads. Thirteen have changed appointments, seven lack POD at first bill review and five of nine accessorial requests lack shipper approval. The groups overlap and have different denominators. Timing uses an authored eight-hour weekday clock.

## E01 Tender-to-freight-bill trail

Synthetic load event register / 48 completed loads on one regional FTL desk.

Delivery-to-bill-ready intervals total 504 business hours, averaging 10.5 hours. One load ID links tender, appointment, dispatch, POD and billing pack.

Interpretation: Completed loads omit open document queues. Keep aging loads visible alongside the mean.

## E02 POD and accessorial workbook

Authored exception audit / 48 load packs, appointment history and nine accessorial requests.

13 loads have a changed appointment; 7 lack POD at first review; 5 of 9 accessorial requests lack shipper approval. MES-011 links revision 2 and detention times to the unresolved charge decision.

Interpretation: POD and approval gaps overlap. Retain appointment history and apply the actual customer evidence requirements.

## E03 Planner-to-carrier walkthrough

Authored dispatch walkthrough / A tender is accepted, reappointed and passed to the carrier.

The facility changes a delivery slot in email; the dispatch note still shows the previous time until the planner updates it and asks for acknowledgement.

Interpretation: This is a fictional handoff, not a live tracking feed or a transport-performance claim.

## E04 Appointment change control

Authored procedure excerpt / Facility, customer and carrier communication after a revision.

Six of thirteen changed loads lack retained carrier acknowledgement. The proposed record keeps old and new plans, reason, owner and acknowledgement together.

Interpretation: The desk must confirm which party can authorize each change; acknowledgement does not alter the contract.

## E05 Detailed accessorial approval audit

Synthetic charge review / The nine requests in the E02 workbook, linked to the 48-load cohort.

Five requests lack required shipper approval. Each request records charge type, reason, supporting evidence and the commercial decision separately.

Interpretation: A requested charge is not earned revenue. Apply the actual contract and retain disputed or denied requests.

04 / OPPORTUNITY 01 / CONTROL THE CHANGE

# Make the revised appointment visible.

**PROPOSED OWNER**

Regional dispatch lead

**EFFORT**

Low; change log and acknowledgement

**WHAT THE EXAMPLE SHOWS**

E02 E03 E04

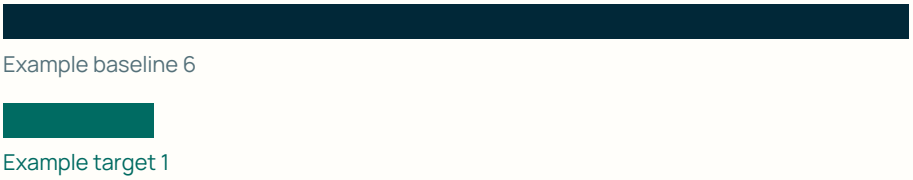
Thirteen of forty-eight loads have changed appointments; six of those thirteen lack retained carrier acknowledgement. The revised facility time is separate from the carrier's current plan.

**WHAT CHANGES**

Use one versioned appointment record linked to the load. Name the owner, retain the old and new instruction, notify the relevant parties and record carrier acknowledgement. Keep an unconfirmed revision open rather than treating a sent message as acceptance.

**ILLUSTRATIVE PILOT TARGET / UNMEASURED**

unacknowledged / 13 changes




Pilot threshold: at most 1 of 13 comparable changed loads missing carrier acknowledgement, versus 6 of 13 in the example. Keep legitimate appointment changes; test the completeness of their communication trail.

**CONTROL THAT STAYS**

Preserve carrier acceptance and customer authority. A new appointment must not silently override transport, safety or contractual constraints.

**MEASUREMENT AND DECISION GATE**

Inspect every changed load for current instruction, authority and acknowledgement. Stop if the carrier is dispatched against a superseded or unaccepted plan.

Competing explanation: Some changes occur after dispatch or are imposed by the facility. Measure communication completeness rather than assuming all changes are preventable.

04 / OPPORTUNITY 02 / COMPLETE THE FREIGHT PACK

# Connect delivery proof to the load.

**PROPOSED OWNER**

POD coordinator + billing lead

**EFFORT**

Low; evidence checklist and queue

**WHAT THE EXAMPLE SHOWS**

E01 E02 E03

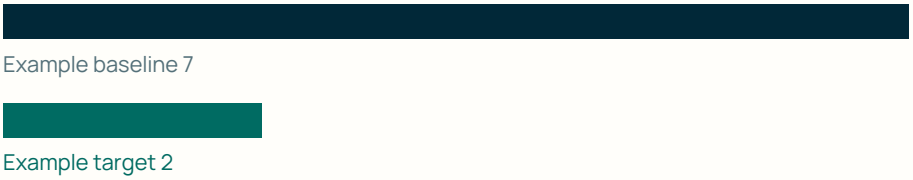
Seven loads lack required POD at first billing review. Billing must chase evidence after operations has marked the movement complete.

**WHAT CHANGES**

Define the required POD by customer and attach it to the load reference. Record document status, reason, resolver and next review time. Reconcile the evidence to the correct load and delivery location before the pack enters billing review.

**ILLUSTRATIVE PILOT TARGET / UNMEASURED**

missing POD / 48 loads




Pilot threshold: at most 2 missing POD packs per 48 comparable loads, versus 7 in the example. Compare delivery-to-bill-ready time with the 10.5-hour baseline; collection time needs a separate measure.

**CONTROL THAT STAYS**

Do not manufacture signatures or accept a wrong-load document to close the queue. Keep disputed or incomplete delivery evidence with the authorized owner.

**MEASUREMENT AND DECISION GATE**

Each pilot pack has the correct required evidence or a named exception. Inspect returned documents and unresolved age before expanding.

Competing explanation: Document timing may depend on the carrier or facility. Separate external waiting from avoidable internal search and linkage.

04 / OPPORTUNITY 03 / PROTECT THE CHARGE DECISION

# Keep accessorial approval explicit.

**PROPOSED OWNER**

Customer operations manager

**EFFORT**

Medium; authority and charge evidence

**WHAT THE EXAMPLE SHOWS**

E01 E04 E05

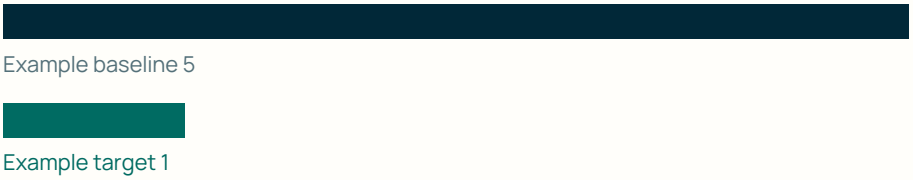
Five of nine accessorial requests lack required shipper approval. A delay note or carrier request does not establish authority to bill the customer.

**WHAT CHANGES**

Link the requested charge, contract basis, event evidence and shipper decision to the load. Name who seeks approval and who decides billing readiness. Preserve denied or disputed requests so the record does not imply that every requested charge is recoverable.

**ILLUSTRATIVE PILOT TARGET / UNMEASURED**

approval gaps / 9 requests




Pilot threshold: at most 1 request missing required approval among 9 comparable accessorial requests, versus 5 in the example. This is approval completeness, not projected accessorial revenue.

**CONTROL THAT STAYS**

Commercial terms and authorized decisions govern charges. The workflow does not approve a fee or override a customer dispute.

**MEASUREMENT AND DECISION GATE**

Reconcile each pilot charge to its contract and retained approval. Hold unresolved charges outside the approved billing total.

Competing explanation: Some contract terms preauthorize a charge. Confirm whether separate approval is required before counting a missing email as a gap.

05 / TURN THE REPORT INTO DECISIONS

# The next 90 days.

An illustrative sequence. Replace the synthetic baseline with authorized evidence, then scale only what passes its gate. A failed pilot is a reason to revise or stop.

DAYS 1-30

## Rehearse the changed load.

Dispatch lead + carrier coordinator

Replace sample records and define appointment authority. Pilot versioned instructions and acknowledgement.

Decision gate: The carrier can identify the current accepted plan.

DAYS 31-60

## Link proof to billing readiness.

POD coordinator + billing lead

Define customer-specific POD requirements. Measure missing documents, queue age and comparable elapsed time.

Decision gate: Packs contain correct evidence; unresolved loads remain visible.

DAYS 61-90

## Test the charge decision trail.

Customer operations + finance

Review accessorial basis, evidence and approval. Decide whether to retain, revise or expand the desk's pilot.

Decision gate: Only supported, authorized charges enter a bill-ready pack.

### ASSUMPTIONS TO KEEP VISIBLE

- All 48 loads, nine requests and timings are authored.
- Changed appointments are not inherently service failures.
- Readiness, transit, revenue and cash are different measures.

### OPEN QUESTIONS AND OWNERS

- Dispatch lead: confirm appointment and communication authority.
- Billing lead: validate customer-specific POD requirements.
- Commercial owner: confirm accessorial terms and approval rules.

06 / YOUR NEXT STEP

# Make this your workflow.

Edge is ProcessScout's guided assessment service for one recurring workflow.

## $1,500 USD

PAID UPFRONT

One legal entity, one business unit and one workflow.

### WHAT YOU RECEIVE

A Trail Map (the reviewed report you receive), three prioritized opportunities, a baseline and a sequenced 90-day plan.

One supported starter asset: an SOP, control checklist, requirements specification or automation blueprint. Production implementation is a separate engagement.

### WHEN YOU RECEIVE IT

Five business days after your evidence checklist is complete.

The clock starts when sources, recordings, documents, interview and blocking questions are complete. Payment alone does not start it.



**David Bell** ProcessScout review lead

25 years in operations and finance, including Shell and Deutsche Bank; founder and CEO of JustPayroll through its 2024 acquisition.

David Bell leads the review approach. The analyst assigned to your assessment owns its recommendations and sign-off.

### THREE OPPORTUNITIES, OR YOUR FEE BACK

If ProcessScout cannot identify at least three evidence-backed opportunities from a good-faith intake, the assessment fee is refunded under the assessment terms. This is a deliverable guarantee, not a promise of realized savings.

Read assessment terms

### CANCELLATION AND SCOPE PROTECTION

Cancel before analyst review starts for a full refund. If the report materially misses the agreed brief, tell us within 14 days of full access and choose an in-scope correction or a refund after review.

Read the full protection policy

Book a 15-minute fit call

Discuss fit, scope and your decision. The call is not the assessment itself.

Open this interactive sample