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## Reconcile Carrier Review

**DEPARTMENT:**  
**DESK/ACCOUNT:**

**Logistics Shared Services**  
**Service Improvement**

**LOB: SCM**

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### **Purpose/Scope:**

Ensures appropriate carriers participate in the Carrier Scorecard Reconciliation Program. Business changes driven by customers, carriers and/or internal organizational changes may create a need to add or remove specific carriers from the Carrier Reconciliation Program.

### **Instructions:**

- Review overall reconciled and non-reconciled carrier overall and customer specific load volume and overall scorecard ratings for previous quarter.
- Compile a list of carrier recommendations to be added, removed or flagged "Scorecard Only"
  - Monthly SLI Volume vs. Reconciled Carrier Volume report available on the 4<sup>th</sup> Monday of each month.
    - Schneider Trending and Analytical Reporting (STAR)
    - NewsIndex>Information Management>Purchasing>Reports>Monthly SLI Volume vs Reconciled Carrier Volume
  - Perform data analysis to include, but is not limited to:
    - Mode
      - Exclude: SMPK, AIR, VESL, DDS, RL
    - SCAC vs. Load Volume Trends
    - Transportation Related On-Time Pickup and Delivery Performance Trend
    - Previous overall scorecard ratings
    - Tender and Load Completion Methods
    - Customer requirements and business segments
  - Provide the list of carrier recommendations to Provider Services via email and request feedback.
- Email updated Reconciled Carrier List to IM to be published in Interactive Reporting and Analysis.

### **Adding a carrier:**

- Contact Purchasing Manager and/or Customer Service for carrier point of contact.
- Contact carrier to introduce program and explain benefits, including what expectation exchange.
- Add carrier to the Reconciled Carrier List and include Sumit Carrier ID, SCAC and carrier name matching Sumit formats.
- Create NoticeCast report.
- Create scorecard group email group code in Microsoft Outlook.

### **Removing a carrier:**

- Notify carrier contact, if applicable, they will no longer be in the program.
- Remove carrier from Reconciled Carrier List prior to publishing in Interactive Reporting and Analysis.
- Contact IM to remove carrier Sumit ID from reconciled carrier table.
- Delete scorecard group code from Microsoft Outlook.
- Inactivate carrier in Access Database.
  - Open Access Database
  - Shared Data\Logistics\Team Docs\Carrier Performance\Carrier Evaluation\Carrier Weekly Log.mdb
    - Open Navigation Pane\Tables\Carrier
    - Uncheck box next to carrier name and delete Carrier Specialist Name
    - Close window (saves changes automatically)



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**Change carrier to Scorecard Only:**

- Notify carrier contact they will receive monthly Scorecard Only
  - Highlight carrier name on Reconciled Carrier List in yellow and add asterisk (\*) identifying **\*Carriers receiving monthly scorecard only.**

**Critical Points:**

Ensure review is complete, revised Reconciled Carrier list is published and IM tables impacting carrier metric reports match Reconciled Carrier list prior to scorecard publishing of first month, following quarter.

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**REVISIONS:**

Revision Number	Date of Change	Description of Revision	Author Name	Approver Name
1	10/21/2011	New Document	Brandon Collett	Brandon Collett

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