

WHITE PAPER

A Practical Guide

Everything you need know about buying a Dock Appointment Scheduling System

By Gregory Braun

Senior vice-president,
C3 Solutions



C3 Solutions

Table of content

1. What is Dock Appointment Scheduling? _____	02
2. This Can Get Better _____	04
3. How to decide what works for you _____	05
4. Making the Pitch _____	11
5. 10 tips for a successful implementation _____	13
6. Conclusion _____	18

If you are reading this, chances are you know a bit about dock scheduling, and need more information.

That's why we've put together this practical guide!

Read on to learn the signs you might need some help with dock scheduling, how to decide what kind of system you need, how to 'sell' it internally, and finally, some tips for a **successful implementation**.

*What is
Dock Appointment
Scheduling?*



1.

What is Dock Appointment Scheduling?

First, the basics: Dock scheduling is a means for managing the timeliness of inbound and outbound transportation (truck traffic) at your loading dock(s) in order to maximize the efficient operation of those docks.

WHITE PAPER
Understanding Dock Scheduling

[Download this whitepaper](#)



11 Signs Dock Scheduling Could Help You

The dock is a key part of any operation. It is the critical interface between the inside and outside, for product coming and going. It can either be a chokepoint and a source of pain, or it can be a model of efficiency that reflects your entire operation.

Let's look at a few of the warning signs that your dock is becoming a chokepoint:

1. There is frequently a lineup of trucks in your yard.
2. Drivers complain about the wait times at your docks.

3. Carriers are getting testy about making pickups and deliveries at your site.
4. Your customers are unhappy, and are penalizing you because of late deliveries.
5. Staff are constantly on the phone with carriers, making appointments and answering queries about where drivers are.
6. Internal clients, like sales or purchasing, are calling to find out where product is.
7. Staff are working too much overtime, but also seem to have a lot of downtime when there are no trucks arriving or leaving.
8. Safety is compromised because people are in a hurry. Mistakes are made. Debris builds up. Maintenance may be skipped.
9. There is lots of paperwork: Daily, weekly, monthly reports, truck manifests, driver detention invoices... it builds up and takes too much of your time to manage.
10. You don't have any insight into carrier performance.
11. You feel overwhelmed and out of control.

You don't need to be experiencing all these problems for your docks to be operating inefficiently. Even exhibiting one or two of these symptoms means there are steps you can take to streamline operations, and enhance efficiency to improve productivity and cut costs.

2.

This Can Get Better

Upping your appointment scheduling game can net huge benefits. You know in general that there are opportunities for improvement. But how do you determine the right approach to solving your specific dock challenges?

There are several types of dock appointment scheduling system, each with its own advantages. Broadly, they divide into two types, **Appointment Management** and **Dock Scheduling**.

Appointment Management System

This usually takes the form of a spreadsheet or commonly available online calendar (such as Outlook) that tracks the time slots your carriers want at your dock. It has to be managed by a human scheduler, who keeps track of changes, conflicts and keeps it up to date.

However, its **drawbacks** include:

- » The challenge of keeping an up-to-date version where various internal stakeholders can access the information it contains.
- » Carriers still have to be notified by phone or email when a change is needed.
- » Communications errors can happen in a manual system, especially when things get busy.
- » You need to have perhaps more than one full-time scheduler on staff.
- » If your scheduler gets sick or quits, you'll be scrambling.

Dock Scheduling System

Dock Scheduling moves beyond appointment management by enabling sophisticated prioritization of customers, suppliers, loads, product types, carriers, and more, depending on your specific business needs. In essence, it's a capacity planning tool; or a smart-schedule.

It allows direct communication between the system and carriers, and enables real-time visibility via a web portal to anyone who needs it, including carriers, suppliers, internal staff, or customers. Its communications abilities mean that phone calls, faxes and emails between your staff and carriers are eliminated.

A dock scheduling system can also have reporting capabilities that include audits on loads delivered, enabling compliance information to be recorded and transmitted automatically, and authoritatively.



3.

How to decide what works for you

What are the specific benefits you want from your system? Knowing this and having a plan for how you want your docks to operate will inform the choices you make about a solution.

The overarching objective is to ensure maximum productivity of the workforce while ensuring correct receiving and shipping of product.

To make that happen, your first order of business is to develop a dock operations plan that suits your business model.

There are a number of parameters you need to consider when making your dock scheduling operation plan. You already know where your pain points are, so now think through what you'd like to have.



A best-of-breed dock scheduling system should be able to offer you...

(A)

Functions

(B)

Interface

(C)

Data Sharing

(D)

Technology

A Functions

- ✓ **Management of multiple receiving and shipping sites** should be part of the offering.
- ✓ **A web portal that is accessible by both carriers and suppliers** is an important piece. This 24-7 self-serve option would allow them to book their own appointments and update the schedule as needed.

- ✓ **The ability to customize constraints.** Whether as simple as differentiating between palletized or non-palletized shipments, or with complex logic based on product type, POs, vendors, and more, you should be able to get a system that will work to the rules you set.
- ✓ **Custom appointment durations will be helpful.** If you have shipments that take longer or shorter times than standard, you can set parameters to customize the ones you need.
- ✓ **Automation that may be adapted to your needs.** Choose which carriers receive fully automated service and which need hands-on attention.

- ✓ **Standing appointments are key.** With them you should be able to not only book the loading dock space, but also preconfigure the labor and space requirements in the warehouse. Configurable expiration dates also allow for cancellation and freeing up the slot for another user.

- ✓ **Document attachments functionality** should be part of the package. Systems should be able to attach any kind of document to an appointment booking, from packing slips, to BoLs, POs and more.



- ✓ It should be possible **to transmit automated notifications to users by email.** Just about any action can be set to trigger a notification and you choose which users need particular notifications.

B Interface

- ✓ **Mobile-enabled scheduling** should allow warehouse, yard staff and drivers to quickly capture key data points on their devices, such as time-stamps for arrivals, on-dock and departures.
- ✓ Web-based scheduling should have **drag and drop functionality**. Most users are now familiar with applications offering drag and drop and intuitive user interfaces, which greatly reduce the level of training required.
- ✓ Users may be given permission to **access the system from anywhere** and to the level they require for their particular function.
- ✓ **Multiple languages and time zones** should be supported.



C Data sharing

- ✓ **Integration with multiple systems** should be a basic function of the system. Whether it's WMS, ERP, TMS, or something else, your scheduling software should be able to 'speak' to these other systems easily, allowing data to flow in either direction.
- ✓ **Reporting** should be easy and adaptable. It should be possible to extract data daily and share it with your other systems, or export it directly. Reports should be flexible and it should be possible to grant rights to specific users to create, edit or read only, depending on their needs.
- ✓ **An audit function** should allow you to track and manage performance of carriers, and your own operations, to designated KPIs. The system should be able to audit results against your own set of business requirements.



D Technology

There are a few ways you can get the dock scheduling system you need. Options include developing it in-house, buying a license software, or choosing Software as a Service (SaaS).

✓ **In-house development** may seem like a good option if you have a unique set-up with custom legacy software and IT resources sitting idle. However, once you factor in all the time and resources it would require to develop your own solution—unless you are a software development firm—chances are you'll find yourselves behind schedule and ultimately with an out-of-date product. There's so much expertise on the market at the moment that in-house development just doesn't make good business sense.

✓ **A SaaS solution**, on the other hand, requires no hardware and no software. It is scalable and quick to implement. SaaS systems also avoid the security concerns about letting outside users inside the company firewall, because they are hosted in secure data centers and are frequently updated to ensure security keeps up. These systems are easily customized and can effectively communicate with your enterprise systems. SaaS systems are also less expensive and can offer an ROI in only a few months.

✓ **Licensed software** requires a sizeable investment in hardware to run it on, and also may leave your organization vulnerable to data breaches when the system runs on your own servers (due in part to external portal access). It generally requires a substantial commitment to maintaining in-house IT resources as well.



A vendor evaluation checklist

It's important to thoroughly evaluate the ability of potential vendors to deliver the product and system promised. Especially when you are contemplating selecting a cloud-based system, that vendor's capabilities in terms of several critical functions are paramount.



Can they provide:

- ✓ **Security.** Because your system is intended to allow users from outside your organization to access the scheduling portal, being able to ensure security of your systems and data is of paramount importance.
- ✓ What **service level** do they provide? Do they provide support during the hours you may need it? What consequences are there if the vendor does not deliver on their service levels?

- ✓ What is the **upgrade plan**? How often is the software revised or updated? Is it regularly scheduled or on an as-needed basis?
- ✓ What is their **technology infrastructure**? How do they ensure uptime if they are a SaaS provider?
- ✓ Dock scheduling is a niche software product. Is the vendor creating this software as a key part of their offerings or is it a sideline? In short, what's their **commitment to the product**, and are they a well-established company that's likely to stay in business?

References

Don't be shy about asking for references from a potential vendor. And when you get that reference, make sure you talk to some key people:

- ✓ Speak with the **end-users** of the system—what do they like or dislike about it? Do they see it having made an improvement in working conditions?
- ✓ What does the **project manager** have to say? Did the vendor deliver as promised? How were variances, conflicts or problems dealt with? Was the implementation smooth?
- ✓ What about the **warehouse manager**? Has productivity improved as expected? Did the ROI calculations work out? How are carrier relations subsequent to implementation?

4. Making the Pitch

By now you should have a lot of information at your fingertips. You have a plan; you know what features you need in a dock scheduling system, and what to look for in a vendor.

While for some of you the need for a scheduling system is painfully obvious, and the pressure to implement one may be coming from senior management, for others it might be necessary at this point to demonstrate the value to management before you can get the budget to proceed.

In that case, the next step is to estimate the cost of inefficient operations.



A pain point calculator

Here are some pain points you can quantify in dollars. Open a new spreadsheet and start entering:

- » Driver detention fees
- » Unnecessary trailer demurrage fees
- » Unscheduled overtime pay
- » Premium transportation services
- » Lost shipments
- » Lost time injury costs due to poor loading dock safety practices
- » Fines for breaking health and safety regulations due to trip and fall hazards or improperly maintained equipment

Need more data? A few more you might want to estimate include indirect or opportunity costs, such as:

- » Internal communications: Estimate the amount of time spent answering inquiries from internal customers regarding the whereabouts of their inbound or outbound product. Multiply the number of calls or emails per day by the average time spent on them.
- » Manual logging and reporting. Same formula as above: instances x average time spent. Time spent hunting for shipments. Double ordering due to lack of visibility at the dock.
- » Missed urgent loads.
- » Failure to track out of compliance shipments and carriers, resulting in loss of potential chargebacks.
- » Product damage due to rushed loading or unloading. This is harder to estimate as the cause is not directly attributable, but a rushed dock will likely have a higher incidence of damage.

For a glimpse at how your operation's ROI might net out, we suggest you try this [**Dock Scheduling ROI calculator.**](#)

Once you know the costs associated with your current practices, and you combine that data with the plan you developed to address your challenges, you can then decide on the scheduling system that works for you and calculate an ROI.



10 tips for a successful implementation

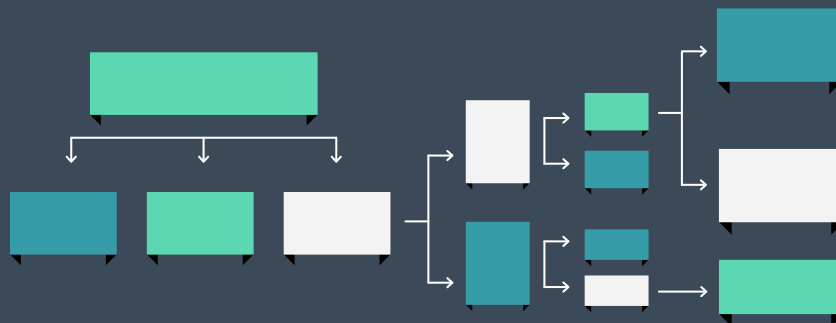
Once you have approval for the dock scheduling system, your next steps will be to plan the implementation and then make it happen. The keys to a successful IT implementation apply almost everywhere, and getting a dock scheduling system up and running is no different. Here are our suggestions for the key elements you need to include.

1. Scope it

- » Be crystal clear on the scope of the project. That means defining and communicating exactly what you will and will not be doing with this implementation.
- » Identify your business objectives. What is the company going to gain from this system?
- » Build metrics from before the implementation and set targets for afterwards. What specific benchmarks are you aiming to achieve?

2 Map it

- » Make a detailed map of your business processes. Be as thorough as you possibly can.
- » Document exceptions to standard procedures.



3

Own it

- » Be completely involved throughout the entire process.
- » Ensure you have subject-matter experts on the team to take on training and configuration in their particular area of specialty.
- » Set up testing and configuration validation for every step.

4

Pick power players



- » Define roles and responsibilities for the team, ensuring you have the correct resources teed up.
- » Make sure they are fully committed and have the time allocated to play their part.
Some of the people you'll need include:
 - » Project manager
 - » Super users – these folks need to be onboard from the beginning, involved in the entire project, understand the processes and system requirements involved
 - » Business subject matter experts
 - » Integration resources
 - » Trainers
 - » Others particular to your needs

5

Value the vendor

- » You are on the same team. Work to establish good, open relations from the start.
- » Ensure you have clear communication channels and visibility into what they are doing and where they are at in the plan.
- » Be sure that any challenges that arise or perceived risks on the horizon are communicated in both directions, fully and as soon as they appear.
- » Use their expertise. This may be your team's first implementation of this type, but it's not theirs. When issues arise they've likely seen something just like it on another project. Don't be afraid to ask their advice!

6

Say it loud — and clear

- » Communicate. This means keeping clear channels not just with your team and vendor, but also with the rest of the stakeholders in your company. End-users, operations people and senior management all need to be kept in the loop with regular updates and exception reporting.
- » It's important to schedule regular meetings with users and operations departments to show them the system, its processes and how it will be configured. They may have valuable feedback, and will definitely appreciate being in the loop.
- » All this communication is key to a successful change management program, and will help ensure buy-in from those who will be using the system once it's up and running.

7

Bring it all together

- » Involve your integration resources from the outset. Because information will be required and decisions made throughout the implementation process, these resources will be very important. They will be consulted about what information can be transferred, and when, what the touch points are and so on. They need to be available to confirm feasibility.

8

Practice makes perfect

- » You must not underestimate the importance of ensuring the end users are properly trained and have the necessary documentation available to them.
- » Training needs to be comprehensive and hands-on, with lots of opportunity to practice, so they get the feel of actually using the system, before it is live.
- » Ensure there are 'cheat sheets' for every user role. These need to have detailed, step-by-step instructions. Having this in place will greatly reduce errors and lower the number of support requests during and after the go-live period.

9

Flipping the switch

Here's a list of the elements you'll need in play for the go-live:

- » Internal support resources for all locations, every shift, and all business areas that are using the system.
- » Vendor support, either on-site or remote. Establish an issue-reporting procedure with the vendor.

- » Ensure your users know what the proper procedure is should they encounter an issue. Who do they contact and how?
- » Be sure there are open channels of communication back from the end-users to the system team so that suggested changes or improvements can be communicated. Otherwise, workarounds will happen or users will try to bypass or not use the new system.

10

Maintain the momentum

- » The best demonstration of a successful implementation is the system's sustainability.
 - » Make sure you have an ongoing training strategy in place.
 - » Cultivate your super users. They will likely be the ones to handle training, configuration, testing new versions, support and the relationship with the vendor team. The ongoing success of the implementation will largely depend on their engagement, hard work and continuing support for the new system.

Conclusion

As we noted at the outset, your docks are the key interface between the outside world and your warehouse. Operations there can be either a painful mess or an efficient gateway to a streamlined and cost-effective organization. Having a smooth functioning dock appointment system can make the difference between those two extremes.

From pain to gain, we hope that this guide has helped take you from identifying the pain points that a dock scheduling system can address, right through scoping, justifying and developing a plan for a successful implementation of one of your operations.



C3 Solutions is an information technology company specialized in yard management (YMS) and dock scheduling (DSS) systems.

Since its founding in 2000, C3 has gained the confidence of clients around the world and across many industries including retail, grocery, distribution, manufacturing and parcel post.

Headquartered in Montreal (QC), Canada and privately owned, C3 is dedicated to developing, implementing and supporting the most complete yard management and dock scheduling products on the market today.

For more information,
visit www.c3solutions.com

Get in touch

1751 Richardson
Suite 4408
Montreal, QC H3K 1G6

514.315.3139
sales@c3solutions.com



C3 Solutions