



# Transforming a Shipping Company's Business Model With AWS Connect

## Executive Summary

ScaleCapacity helped OTR Solutions, a freight factoring solutions company, modernize and streamline their trucking fee by migrating their existing call center to the AWS Cloud. Using Amazon Connect to host the center allowed OTR to reverse the sales process, reducing hundreds of cold calls per day and freeing agents to focus on higher value tasks.

In collaboration with



## The Challenge

Negotiating the trucking fee is a critical part of OTR's business model—the lower the fee that OTR pays a trucker, the more money the brokerage gets to keep. OTR's sales process relies heavily on agents, whose job for many years entailed cold-calling multiple truckers every day to see if they would accept a shipment for a certain price, or "bid." While the system worked, says Vijay Musaligari, ScaleCapacity vice president, several inefficiencies were making the agents' jobs challenging and holding OTR back from scaling their business:

- **Cold-calling was time-intensive and could be frustrating.**  
Under the old system, agents spent most of their day calling individual truckers and trucking companies to see if they were available to take a shipment. Besides using up a lot of agents' working hours, truckers frequently were unavailable or did not answer the phone.
- **The old bidding system did not produce the best bids.**  
Cold-calling truckers also made it hard for agents to tell if they were getting the best price for a shipment. If a trucker said "yes" to a certain price for a particular shipment, for instance, the agent had no way of knowing if another trucker would have accepted the assignment for a lower rate.
- **Phone lines would get clogged, limiting business opportunities.**  
On a daily basis, OTR is asked to move between 200–300 shipments for their customers. Of that number, about 10% are "noisy" assignments, meaning that they attract a lot of attention from truckers due to the popularity of a location or other market fluctuations. Under the old system, multiple trucking companies would call in for these "noisy" assignments, clogging the phone lines and preventing agents from handling their other, often more profitable assignments.

## About the customer

ScaleCapacity is an AWS Advanced Partner and public sector solution provider. They focus on finding human-centered solutions through migrations, application development, and digital transformation in the AWS Cloud.

### The specialize in:

- Amazon Connect
- AWS CloudFormation
- AWS Lambda
- Amazon EC2

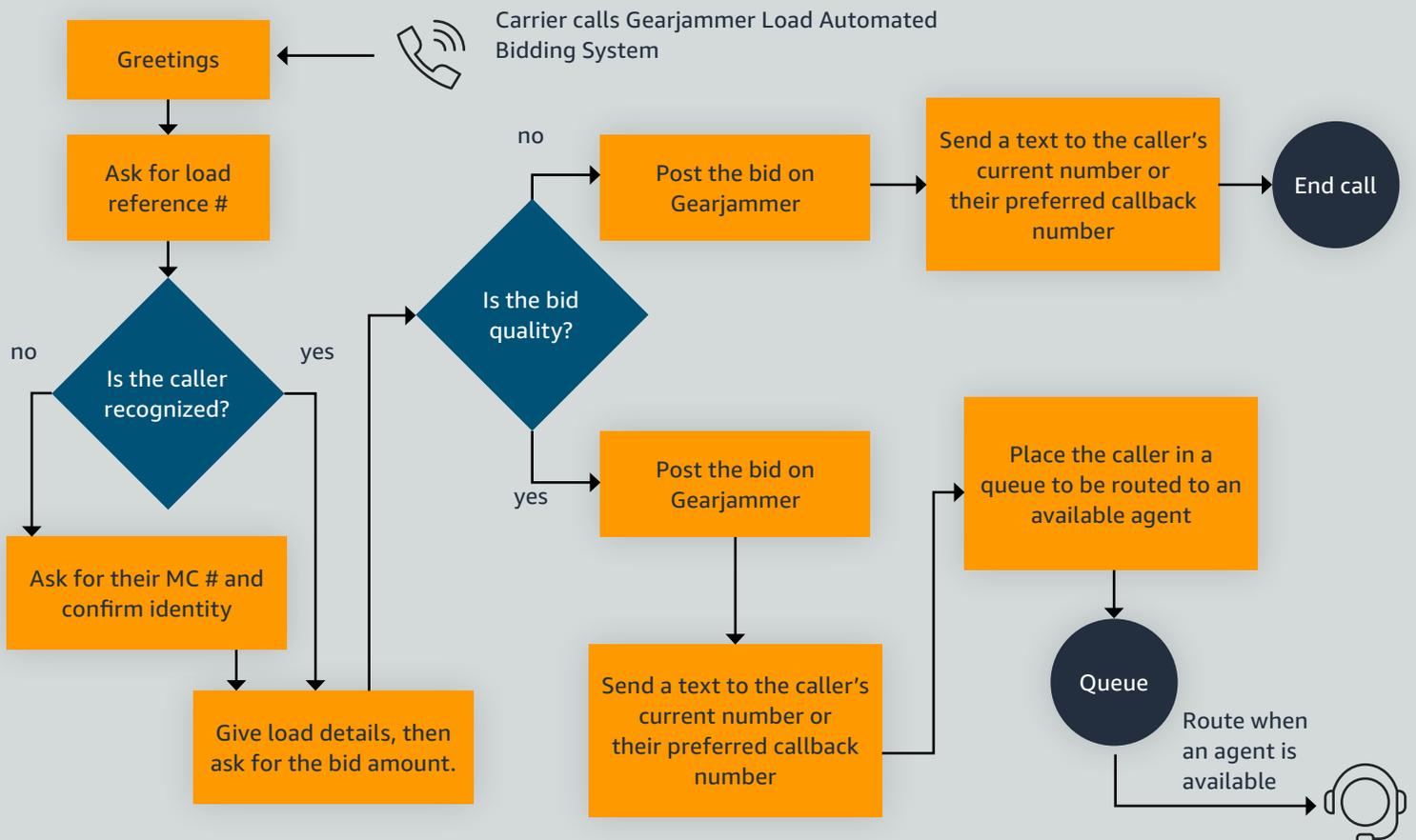


## The Solution

After observing OTR's brokers at work, "We realized we could formulate a self-service type of solution where we the truckers call OTR and log their bids themselves?" says Musaligari.

ScaleCapacity team used Amazon Connect, an automated call-center technology, to reverse the sales process. Instead of agents calling around to truckers, OTR could post its available assignments to a message board. Via an automated question-and-answer process, a trucker can call in, insert the reference number for the shipment, and receive a recording containing all the necessary information. For example, the recording might say, "This load needs to go from Boise to NYC, pick up at 8 AM today and deliver tomorrow 8 AM, Please submit your bid." If the bid falls within a competitive price range, it gets routed to an agent.

# Load Automated Bidding System



## Results

"It's almost impossible to overstate the advantages that Amazon Connect has brought to OTR," says Musaligari. "It's the business disruptor that keeps on giving." Some of those advantages include:

- **Phone lines are never clogged, leading to more business.**  
Under the old system, truckers would often hang up if the phone queues were too long, meaning lost business. With the new system of automated, inbound calls, OTR agents know precisely which truckers are interested in which assignments—and for what price. Agents can then prioritize their call-back list based on prices, popularity of routes, or other criteria.
- **Agents can work from anywhere.**  
With Amazon Connect, OTR agents can work from anywhere, and calls can get routed to their cell phones, laptops, or other devices. This flexibility allows them to work despite poor weather or pandemic-related closures.
- **OTR receives more cost-effective bids.**  
With truckers sending in their own bids for what they'd charge for hauling a load from A to B, the initial negotiation aspect is removed. Instead of agents guessing what a particular consignment should ship for, truckers can simply tell them—and agents can choose the most cost-effective bid.
- **Data collection results in more informed decisions.**  
Automated bidding also allows for the collection of real-time market data, allowing OTR leadership to make data driven pricing decisions and projections in the future.
- **Truckers and agents have multiple channels to communicate.**  
The Scale Capacity team added a new communication channel, text messaging, to allow for asynchronous communication. This empowers each agent to do even more, as they can be texting with multiple trucking companies while also returning phone calls to other interested candidates. Truckers love the new system, too, as they can now make bids via text or phone. Texting also allows truckers to revise their offers quickly—up or down— if their first offer is not accepted.
- **Truckers feel satisfied and empowered.**  
Trucking is a busy occupation, and time on the road means truckers cannot always be available to receive calls. Instead of annoying truckers with phone calls they might not want, the new system frees truckers to make bids.
- **More bids in less time.**  
On a typical working day, the AWS Connect automated solution receives an average of 2000 calls. In the old system, these calls would have to be answered by an agent. Assuming an absolute minimum of 2 minutes per call, that's 4000 minutes, or over 66 hours per day saved – an equivalent of eight full-time employees!

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Perhaps most importantly, as waste and inefficiency have been removed from the process, the volume of calls that OTR agents can handle each day has risen exponentially. The result? Instead of converting only 10% of their calls, today, OTR's agents convert a whopping 33%. For commission-based employees, this shift has been truly transformational.

# A Partnership That Keeps Scaling

Unbelievably, building OTR's new automated call center in the AWS Cloud took the Scale Capacity team less than two months. "Since we were plugged into OTR's business, we were in a great position to help them make decisions that improve their overall business," explains Musaligari. "With Scale Capacity, the business impact always comes first. We take a strategic view of the customer to see where their other pain points might be. We're more than just a provider of tech solutions."

As an additional benefit, OTR's shift to Amazon Connect has also raised the company's visibility in the marketplace. Today, they're seen as a pioneer in the industry, with trucking companies wondering why other shipping companies are not using the same technology. The boost to the company's brand and sales has been so transformative that OTR plans to move its entire phone system over to Connect, which equates to about 10,000 calls per day.

As for Musaligari? "We're excited to see where we can help OTR go next," he says. "At Scale Capacity, we help you use technology to improve your whole business: make better margins, provide better service, and improve your brand value in the market. We're here to help them take the next step in the journey."

## About the Partner:

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