

July 31, 2026

# Meridian Freight Co.

## AI Readiness Diagnostic

18 of 22 employees completed scans

# Executive Summary

Three findings for the client meeting.

1. Meridian is losing an estimated 72 hours per week in status chasing, document reconciliation, and exception follow-up.
2. The fastest adoption path is not a broad chatbot rollout. It is three narrow workflow fixes in dispatch, freight audit, and customer communications.
3. Two workflow gaps should stay manual for now because available tools do not yet fit Meridian's constraints.

## Methodology

Clearline Advisory used structured employee interviews to identify recurring bottlenecks, systems involved, time cost, tool fit, adoption risk, and the presence or absence of credible AI-enabled tools. Scores combine reported time loss, repeatability, tool maturity, setup complexity, and confidence from cross-role response patterns. The instrument design draws on established survey methodology: structured question design, cross-role validation of reported time costs, and conservative scoring where responses conflict.

# AI Readiness Score

74

Overall readiness score

## Distribution

Ready now: 6



Pilot next: 8



Monitor: 3

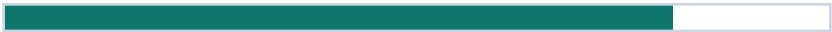


No good tool yet: 1

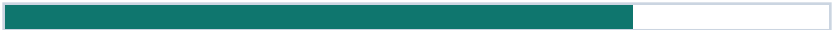


## Department scores

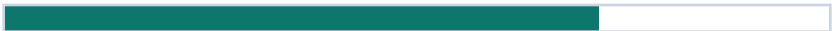
Dispatch 81/100



Finance/Admin 76/100



Customer Support 72/100



Operations 68/100



# Workflow Bottleneck Map

Where hours are being lost.

## Dispatch - 21 hrs/wk

Shipment status updates are reconstructed from TMS notes, driver texts, and customer email threads.

## Finance/Admin - 18 hrs/wk

Invoice exceptions require manual comparison across carrier invoices, bills of lading, and rate confirmations.

## Customer Support - 17 hrs/wk

ETA requests and exception emails arrive faster than staff can summarize context and route ownership.

## Operations - 16 hrs/wk

Proof-of-delivery packets and safety closeout documents are checked by hand before billing.

# Tool Opportunity Matrix

Impact x ease of adoption.



# Recommended Tools By Workflow Cluster

## Shipment status and customer exceptions

Front: <https://front.com/>

Routes shared customer email, summarizes thread context, and keeps exception ownership visible across dispatch and support.

Rose Rocket: <https://www.rosrocket.com/>

Fits Meridian's TMS-heavy dispatch work by centralizing orders, tasks, invoicing, and status workflows.

## Freight audit and invoice reconciliation

Loop: <https://www.loop.com/>

Targets freight invoice errors, overpayments, tracking data, and carrier accountability rather than generic spreadsheet automation.

Docsumo: <https://www.docsumo.com/>

Extracts and validates data from invoices, bills of lading, and related logistics documents before staff review exceptions.

## Fleet maintenance and compliance follow-up

Fleetio: <https://www.fleetio.com/>

Converts vehicle, inspection, fuel, parts, and maintenance data into alerts and work queues for fleet reliability.

Samsara: <https://www.samsara.com/>

Provides connected fleet data, telematics, safety workflows, and driver-facing mobile workflows for operations teams.

# Honest Gaps: Where No Good Tool Exists Yet

## Driver detention judgment calls

Why: The decision depends on live customer commitments, relationship history, and context that is not consistently captured in systems.

Manual workaround: Keep a manual dispatcher escalation checklist and use AI only to draft the customer update after a human chooses the path.

## After-hours exception ownership

Why: The work mixes staffing authority, customer priority, and real-world risk. A tool can summarize, but should not own the decision.

Manual workaround: Create a rotating owner schedule and a short exception template that captures customer, load, driver, deadline, and risk.

## Carrier relationship repair after repeated misses

Why: Available tools can surface patterns, but the high-value action is negotiation and relationship management.

Manual workaround: Use the freight audit data as evidence, then have operations leadership handle the carrier conversation directly.

# 90-Day Implementation Roadmap

## Days 1-30 - Dispatch Manager + Finance Lead

- Pilot Front on the shared customer exception inbox.
- Run Docsumo on one week of invoices and bills of lading.
- Define the manual escalation checklist for detention and after-hours exceptions.

## Days 31-60 - Operations Lead

- Compare Loop against current freight audit workflow using live exception volume.
- Move recurring POD/BOL checks into a document extraction queue.
- Train dispatch and support on exception ownership rules.

## Days 61-90 - General Manager

- Decide whether Rose Rocket consolidation is warranted or whether current TMS should remain.
- Deploy Fleetio or Samsara only if maintenance and compliance data are currently fragmented.
- Review hours recovered, adoption friction, and manual-gap items before buying more seats.

# Appendix: Per-Role Recommendation Summaries

## Dispatcher

Use Front or Rose Rocket workflows to keep customer exceptions and shipment status updates tied to ownership.

## Billing Specialist

Pilot Loop or Docsumo for invoice mismatch triage and document extraction before expanding automation.

## Customer Support Coordinator

Use Front AI for thread summaries, routing, and draft replies while humans keep final judgment on exceptions.

## Operations Supervisor

Keep driver judgment calls manual, but standardize the intake checklist and use AI for summaries after decisions.

## Fleet Coordinator

Evaluate Fleetio or Samsara if maintenance reminders, inspections, and vehicle records are split across systems.