



AI on the Road Turning **AI** Into Practical Wins

Lanny Morrow | Analytics & Applied Intelligence Intelligence | MoTA Annual Convention |
October 8, 2026



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Forvis Mazars

Analytics | Forensic Intelligence

- Forvis Mazars (8th largest public accounting firm)
- 12,000 domestic, 47,000 worldwide
- 30 years with the firm
- 25 years in forensics
- Developed first AI in 2008
- Current roles:
 - Director of Forensic Intelligence
 - Director of Applied Data Intelligence & Engineering

- **AI Landscape in Trucking/Transportation**
- **Productivity, Pilots, Data, Governance**
- **Generative AI Demo**
- **Leadership Thoughts**

01

“Change is the law of life. And those who look only to the past or present are certain to miss the future.”

– John F. Kennedy



Technology Journey

We've come a long way — paper logs, ELDs, telematics... and now AI



Technology Journey

But there is a wrong way to go about it...



Is AI here to stay?

- *Yes – Technologies with “general utility” (like the advent of the desktop computer) tend to never go away.*
- But the dramatic and overhyped aspects do disappear in time.
- It will fade into the backdrop of our lives and work, like PCs



Reframing the AI Conversation

- NOT about “go big or go home”
- AI is about saving time, reducing errors, enhancing opportunities
- Think hours or days, not months to start achieving results
- Progress beats perfection
- Small starts = more effective governance



What 'Good' Looks Like Today

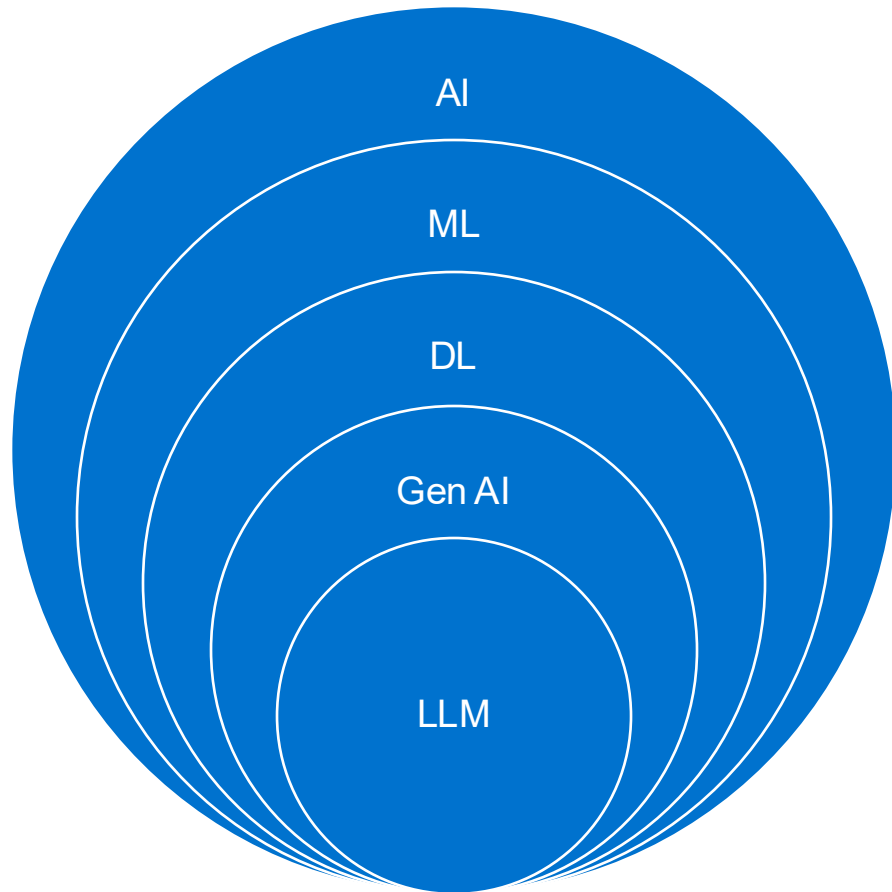
- Clear problem statement
- Simple automation or analysis
- Uses tools you already have
- Delivers visible value in days
- Easy to explain to leadership
- Start with simple then tackle more
- *Governance principles: Outputs are easy to verify and explain. Whole process is easier to rollback.*



A Few Foundational Concepts



AI Overview – Demystifying the Tech



Artificial Intelligence – computer ability to mimic human intelligence, ranging from rule based to complex reasoning

Machine Learning – “traditional AI” – learning from data patterns to predict outcomes

Deep Learning – leveraging human-like neural networks to solve complex problems, such as speech & image recognition

Generative AI – machine’s ability to predict outcome & create new content such as text, audio, video

AI Assistants

vs

AI Agents



Helping me to do things



Doing things for me

Agentic Agents

Agentic agents have four extra properties above and beyond traditional generative AI (LLMs)

Goal-oriented

“Flag, stop, and reduce high-risk transactions or anomalies within the freight-billing process” (contrast with Gen AI “flag high-risk transactions”)

Persistent memory

Builds a history of transactions, exceptions, and prior outcomes for improved detection

Autonomous triggers

Activates when predefined control thresholds or anomalies occur

Multi-step execution

Progresses from detection to analysis to recommended action, with full traceability

Trigger → Detection → Risk Assessment → Action → Audit

Trail



02

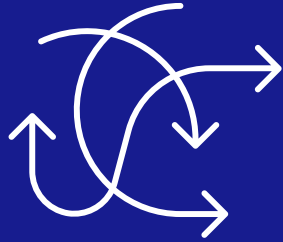
Challenges and Opportunities



Headwinds Facing Carriers

Costs up, margins thin, back offices leaner

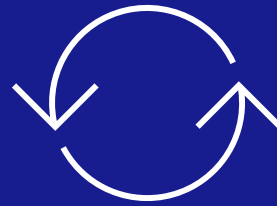
Record Cost to Run a Truck



Average cost to run a truck hit a record **\$2.336 per mile** in 2025 (+3.4%)¹

¹ [ATRI Operational Costs of Trucking, 2026](#)

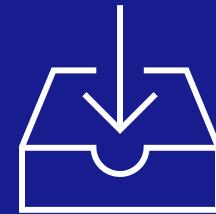
Thin Operating Margins



Truckload and reefer carriers averaged margins **below 1.0%**; flatbed averaged a loss²

² [ATRI Operational Costs of Trucking, 2026](#)

Leaner Back Offices



Carriers cut non-driver staff by **7.8%** but the paperwork didn't shrink³

³ [Heavy Duty Trucking, July 2026](#)

The Industry Is Already Moving

What carriers, brokers, and TMS vendors are reporting in 2026

42%

of carriers say pricing & lane optimization is where AI is changing operations; 31% say driver scheduling & route planning

*Trimble Transportation Pulse Report 2026
(230+ logistics executives)*

57%

of carriers name poor data quality as the biggest barrier to using AI

Trimble Transportation Pulse Report 2026

3M+

shipping tasks completed by C.H. Robinson's generative-AI agents — manual work its people didn't have to do

Heavy Duty Trucking, Jan 2026

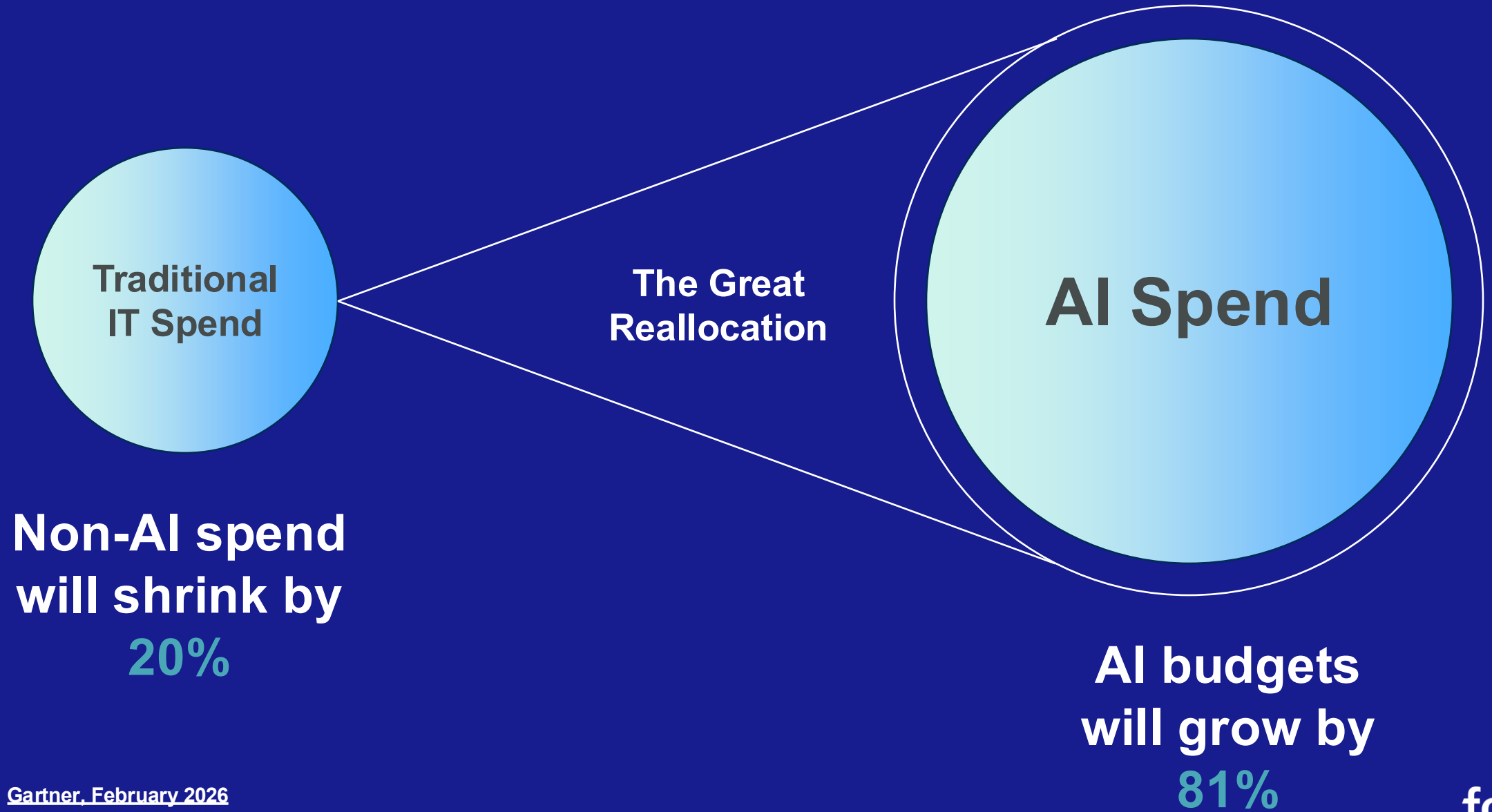
10–15 sec

per load document (rate confirmation, BOL, POD) with an AI reader, vs. 3–5 minutes by hand — vendor-reported

FreightWaves, Apr 2026 (Datatruck)

THE PATTERN

AI is moving from decision support to execution — and it runs on your data quality. The early wins are in pricing, planning, and paperwork.



Productivity
Piloting
Data Quality
Governance

Productivity

Finding the Promised Productivity Gains

Capturing productivity depends on use case selection, adoption, and measurement

95%

Initiatives reporting little or no return.

The GenAI Divide - STATE OF AI IN BUSINESS 2025.

40%

Productivity increase in business professional writing and analysis tasks.

Noy & Zhang, "Experimental Evidence on the Productivity Effects of Generative Artificial Intelligence," Science (2023).

34%

Productivity improvement for less-experienced workers in issues resolved per hour.

Brynjolfsson, Li & Raymond, "Generative AI at Work" (NBER Working Paper 31161)

30-50%

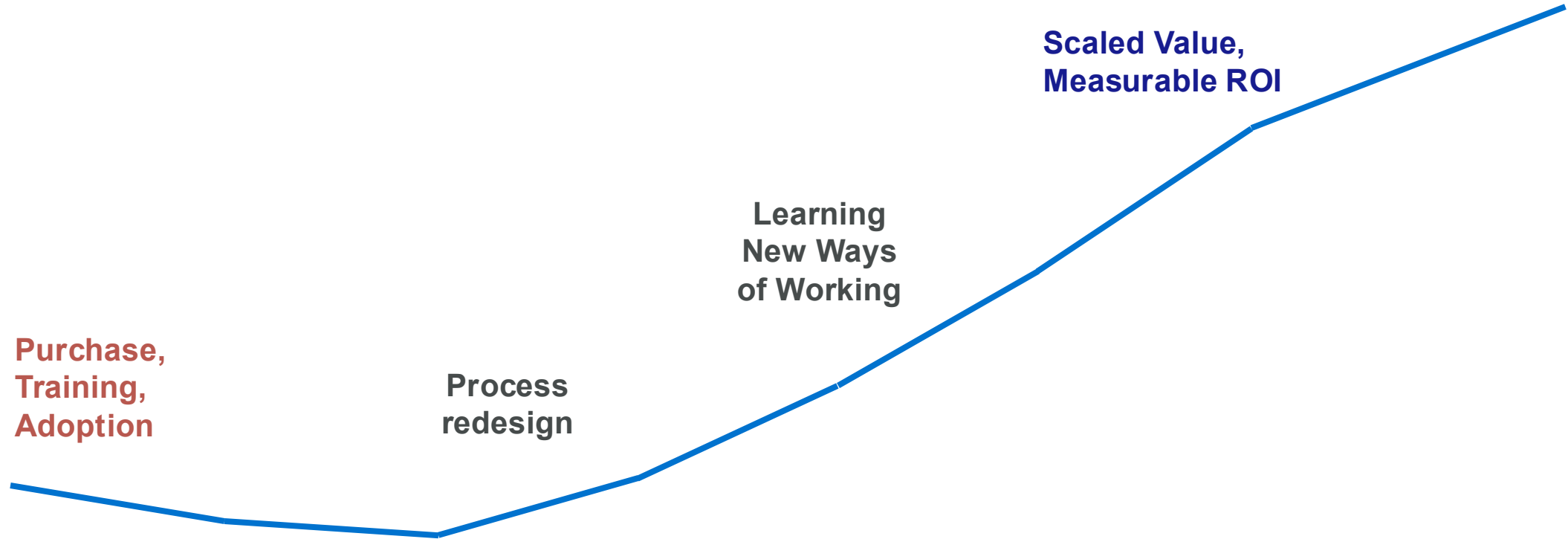
Reduction in unplanned equipment downtime

McKinsey & Company, Predictive Maintenance Research

The Solow Paradox

Costs arrive first. Organizational productivity often arrives later.

“You can see the computer age everywhere but in the productivity statistics.”



Source: Brynjolfsson, Rock & Syverson, The Productivity J-Curve, NBER.

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Productivity: measure business value, not activity

Licenses and prompts are adoption measures, not outcomes

EFFICIENCY

Hours saved

- Cycle time reduced
- Faster close

QUALITY

Errors reduced

- Exceptions resolved
- Consistency

RISK

Loss avoided

- Controls strengthened
- Anomalies identified
- Fraud caught/reduced

CAPACITY

Work absorbed

- Faster onboarding
- Higher-value work enabled

Impact math: hours saved × rate + avoided loss + avoided external spend + increased revenues + better retention + new customers +

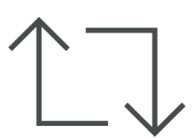
Hint: Your systems may not pick these up through normal operations – you may need to prompt this data from your use cases and pilot champions

Piloting

Identifying the Right Processes

Key Considerations

Find the Right Process to Automate



Repetitiveness

Processes that involve repetitive tasks.



Error Prone

Process is prone to human error.



Volume

Processes that are performed frequently by multiple individuals.



Employee Impact

Process impacts the roles and responsibilities of employees.



Cost Savings

Process has high potential cost savings from automating a process.



Scalability

Process needs to scale as the business grows.

Your First 10-Day Pilot: Pick One

One pain point. One dataset. One goal. One measurement.

Pilot idea	Pain point	Data you already have	How you'll measure it
Load-document reader	BOLs, PODs, and rate cons keyed by hand	Emailed and driver-app documents	Minutes per document; keying errors
Invoice & accessorial check	Missed detention, lumpers, or accessorial charges	Rate confirmations + invoices	Dollars recovered; disputes caught early
Compliance expiry watch	Expired COIs, authority, and DQ-file items found late	Carrier packets, insurance certificates, DQ files	Items caught before use; hours saved
Fuel-card & expense screening	Unusual fuel and card transactions go unreviewed	Fuel-card statements	Exceptions flagged vs. confirmed
Shop-notes summarizer	Repeat repairs hidden in technician notes	Work orders and technician notes	Repeat repairs found; time to diagnose
Customer status drafts	Check calls and “where’s my load?” emails	TMS status + customer inbox	Response time; calls avoided

Illustrative starting points. Pick the one that is repetitive, high-volume, low-risk, and easy to roll back — compare to your current processes.

The same discipline works at every company size

Scale changes the operating model, not the logic of a good pilot

Smaller organizations

Start with one workflow and an existing platform.

Favor document search, invoice review, email classification, policy Q&A, or forecasting support.

Advantage: fewer handoffs and faster decisions. Meaningful impact for resource-stretched environments.

Larger organizations

Start with one workflow but build the foundation for the next “n” projects (reusability).

Establish data quality standards, ownership, access controls, governance, and success metrics early.

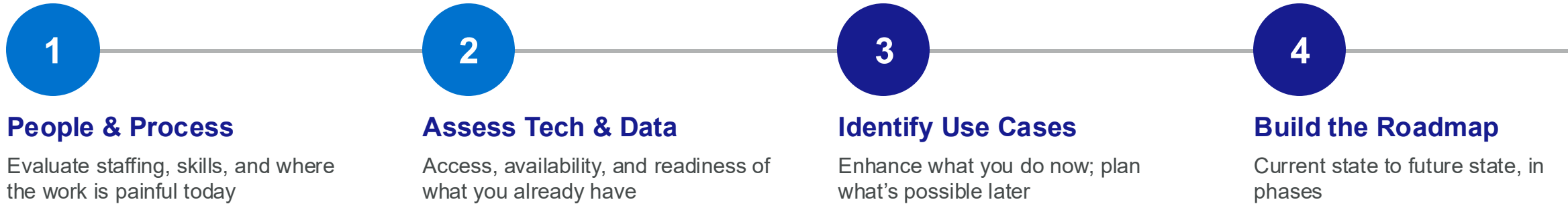
Evaluate whether the underlying data, processes, and operating model can support scaling beyond a single pilot.

Advantage: successful pilots become repeatable capabilities rather than isolated experiments.

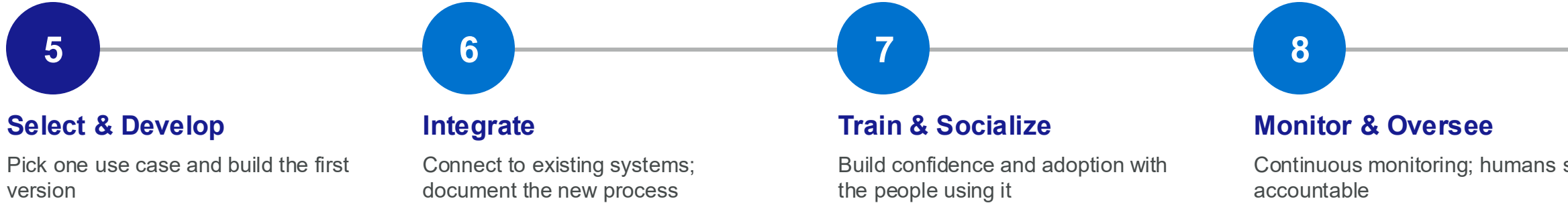
From Readiness to Roadmap

A straightforward path from first look to scaled use

LOOK



BUILD & SUSTAIN



Small starts live in steps 3–5: pick one use case, build it small, and prove it before you scale.

Adapted from the Forvis Mazars AI Strategy & Integration “AI Transformation Journey”

Small Starts, Large Impacts

From one business-unit pilot to enterprise-wide AI

START SMALL

Focused AI strategy for one business unit

Identified high-impact use cases and a clear roadmap

ENABLE

Copilot across the enterprise

Cybersecurity and data controls, executive pilots, training, communications

EXECUTE & SCALE

Automate and expand

Process automation for quick productivity gains; analytics for higher-value, complex use cases

SUSTAIN & GOVERN

Governance and a Center of Excellence

Secure, scalable, sustainable growth

WHAT HAPPENED NEXT

< 6 months

to enterprise-wide Copilot adoption, with strong executive alignment and workforce engagement

3x+

growth in AI investment, driven by proven ROI

“Start small. Prove value. Scale with confidence.”

Source: Forvis Mazars client engagement (diversified middle-market manufacturer). Results are client-specific and do not guarantee future outcomes.

Your Next 90 Days

A starting plan you can put on the calendar

DAYS 1–30

Inventory & Policy

- Inventory current AI use
- Write a one-page acceptable use policy
- Name an AI owner and a small steering group
- Identify three candidate use cases tied to measurable outcomes

DAYS 31–60

Pilot

- Pick the highest-confidence use case
- Define the success measure
- Run a small-team pilot (a 2–10 day build plus validation)
- Set up security and data handling first

DAYS 61–90

Decide & Scale

- Review results against the measure
- Decide: scale, iterate, or stop
- Document what you learned
- Choose the next two use cases

The organizations that keep winning build the habit of doing this again and again.

Adapted from Ryan Kauzlick and Kathryn Schneider, "AI and Automation in the Dealership Lifecycle," Forvis Mazars (Aug 2026)

Why AI Adoption Stalls

Four patterns we see — and “pilot purgatory” is one of them

TOP-DOWN MANDATE

No follow-through

Leadership announces a tool, no one is trained, nothing changes, and the tool is cancelled within months.

BOTTOM-UP SPRAWL

No governance

People adopt consumer tools on their own. Leadership has no visibility, and data may leak without sufficient controls.

PILOT PURGATORY

Never scaled

A pilot runs for years without being scaled, retired, or measured against a metric.

FEAR

Quiet resistance

Employees worry AI is meant to replace them and quietly resist. Adoption may not reach the level needed to see a return.

THE FIX IS CULTURAL

Name champions in every department. Train on the work people actually do. Set clear guardrails. Measure active use — a license sitting unused is not adoption.

Adapted from Ryan Kauzlick and Kathryn Schneider, “AI and Automation in the Dealership Lifecycle,” Forvis Mazars (Aug 2026)

Data Quality

Data quality: what AI needs from you

AI cannot resolve organizational ambiguity by itself

Reliable inputs

Complete, current, traceable data; data needs to be “boringly reliable”

Shared definitions

One meaning for customer, revenue, margin, and exception

Process ownership

Accountability for the workflow and outcome

Feedback loop

Corrections captured so performance improves over time

AI does not eliminate data problems, but it certainly can scale them!

Governance

Governance without killing innovation

Governance is the confidence to move faster inside clear boundaries

1

What data can AI access?

Classify information, set boundaries, and verify vendor handling.

2

Who is accountable?

Name the business owner, technical owner, and risk owner.

3

Where is human review required?

Define decisions AI may support versus decisions people must make.

Guardrails should scale with data sensitivity, external impact, autonomy, and reversibility.

Guardrails: Your Weigh Station

Governance principles that let you start small and stay in control

Confidence, not blind trust

Align outputs with your existing controls, policies, and expectations.

Every use needs an owner

Documented accountability — a job title and a name. Accountability never shifts to the model.

Trust, but verify

Check outputs against a known source. Build in approvals, reconciliations, and spot checks.

Can't explain it? Don't rely on it.

Keep it defensible and auditable.

Match oversight to exposure

Let impact and exposure set the level of review. Start low-risk, with easy rollback.

Use enterprise tools only

Use organization-sponsored licenses with data protections. Personal accounts may not keep your data out of public model training.

Know the risks: hallucinations • different answers each time • models don't think like humans • and AI now intersects with cybersecurity and cargo-theft risk

Sources: Forvis Mazars "Practical AI: Small Starts, Large Impacts"; Heavy Duty Trucking (Jan 2026)

Governance without killing innovation

No B.Y.O.A.I.



- Only use organization-sponsored enterprise AI license (CoPilot, GPT, etc.)
- Personal versions do not have agreements in place to prevent sensitive data from being used to train public AI models
- Data may be discoverable or interested parties may be able to *infer* sensitive, specific information from well-prompted questions and responses
- Agents are good at giving you what you ask, and without regard for governance and security

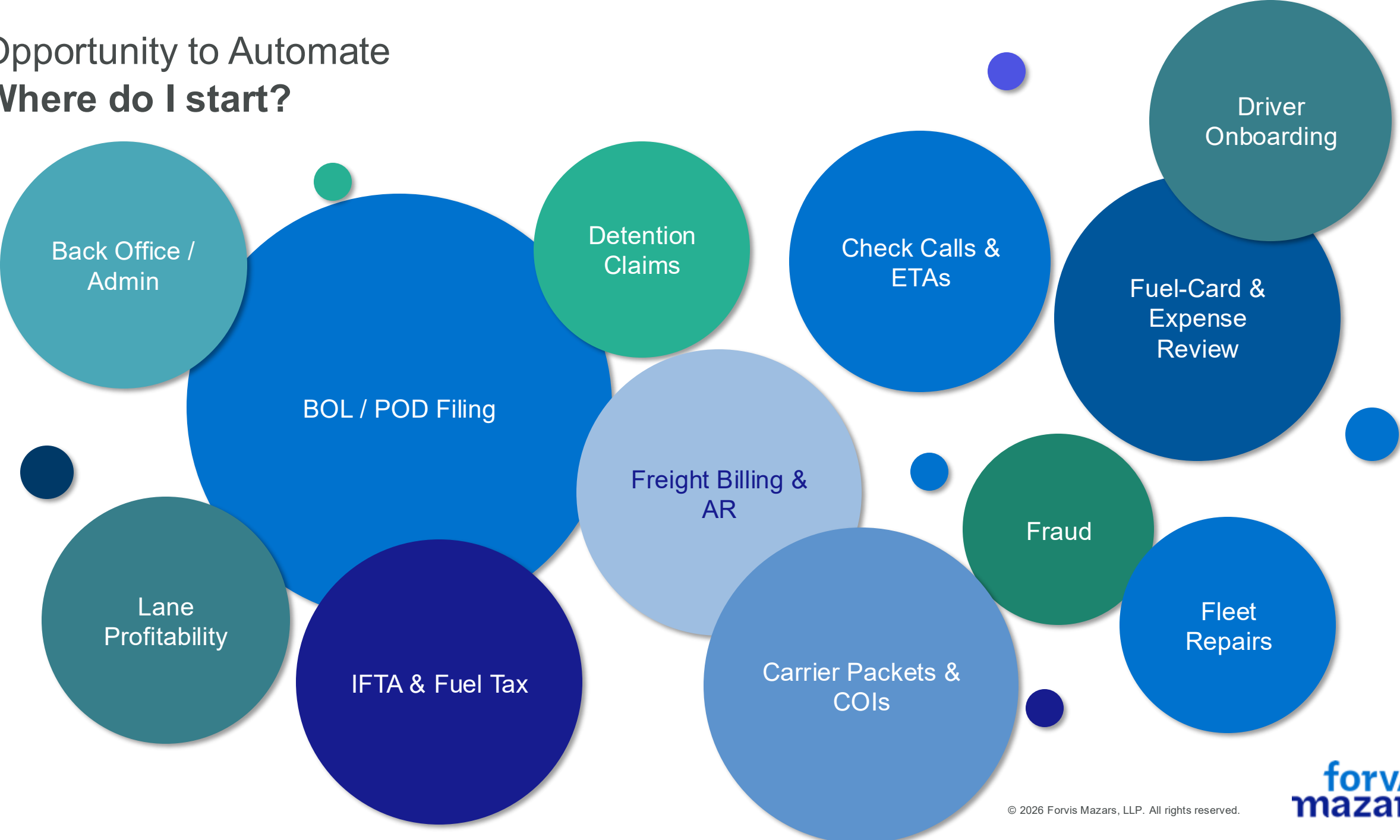
03

Opportunity



Opportunity to Automate

Where do I start?



Where AI Shows Up on the Road

Four areas to consider

01 Planning & Dispatch

- Pricing and lane optimization
- Driver scheduling and route planning
- Fewer empty miles via real-time re-routing

42% of carriers say pricing & lane optimization is where AI is changing operations (Trimble, 2026)

02 Maintenance & Safety

- Predictive maintenance and diagnostics
- AI dashcams and driver-safety analytics
- Shop assistants that search manuals and work orders

Repair & maintenance cost per mile rose 8.6% in 2025 (ATRI)

03 Customer Experience

- Automated check calls and ETA updates
- Instant “where’s my load?” answers
- Drafted status emails, reviewed by a person

AI tools are beginning to handle check calls, status updates and load searches (FreightWaves, 2026)

04 Back Office & Admin

- Reading rate confirmations, BOLs, and PODs
- Invoice, accessorial, and settlement checks
- Carrier packets, COIs, and compliance documents

Where most of our real-world examples live — coming up shortly

Sources: Trimble Transportation Pulse Report 2026; ATRI 2026 Analysis of the Operational Costs of Trucking; FreightWaves (Apr 2026); Heavy Duty Trucking (Jan 2026)

What If ...

Opportunity Cost

What if load documents and routine payments could be handled for you? (BOLs, PODs, rate confirmations, vendor checks, invoices)

Parameters

Assumption	Value
Est. Hours Worked per Day	8
Est. # Days per Week Worked	5
# Hours Per Year	2080
# Corporate Holidays Per Year	10
# of PTO Days Per Year	15
Est. Hours of Work Performed	1880
Est. Days Worked Per Year	235
Est. Weeks Worked Per Year	47
Est. Burden Rate	30%

* Shaded rows are calculated values

Keying Load Documents

- **Frequency:** Daily
- **# Keyed Each Day:** 60
- **# Mins / Occurrence:** 3
- **Est. Labor Cost / Hr:** \$39.72
- **Est. Employees:** 1
- **Est. Yearly Cost:** \$28,003

Performing Check Processing

- **Frequency:** Daily
- **# Performed Each Day:** 20
- **# Mins / Occurrence:** 10
- **Est. Labor Cost / Hr:** \$20.88
- **Est. Employees:** 1
- **Est. Yearly Cost:** \$16,356

04

Real-World Examples and Demo



Live demonstrations

- **Data sets:** Load reporting database, contract/confirmation documents, fuel card usage, vendor and accounts payable, driver settlements, fleet technical data.
- You may have specific concerns or automations that will streamline your workload. You may already be beyond generative AI and using agents.
- **For this demo** – we’re performing “triage” – asking AI to help us spot anomalies, trends, or other areas of concern from financial/revenue risk, compliance risk, and fraud risk. These foundational steps can be combined and programmed into agentic agents that automate these steps.

Live demonstrations: Prompts

Please compare rate confirmation and contract documents to load reports and identify any anomalies.

Analyze contracted detention rates vs actual

Identify fuel card anomalies

Please identify potential fraud, waste, or abuse concerns in the AP/Invoices data

Analyze and report any observations of interest related to driver settlements

Prioritize the list of concerns just discussed

For the given telemetry data, please summarize early triage of fleet health and potential issues

Lessons Learned from Triage

- Often, the value of Generative AI is not the anomaly itself. As we investigate exceptions and ask follow-up questions, we uncover underlying issues in policies, procedures, internal controls, or information systems.
- **The Flywheel Effect:** Lessons learned from initial triage are used to strengthen processes and controls, improving the overall operating environment.
- In subsequent cycles, the volume of anomalies, red flags, and areas of concern declines. The exceptions that remain are easier to identify and are more likely to represent true anomalies requiring attention.

Data Sources and Approach

- **Small Pilots** – Excel or dumps from your accounting or TMS systems, run from your desktop PC
- **More Efficient:** Point AI at source data in your TMS, accounting information systems, etc. Use a custom prompt that details exact requests and expectations.
- **End Game:** Modern data platform connected to all data, cleansed and “AI-ready.” Analysis and alerts occur in real-time and managed by **AI agents** that perform follow-up work prior to reporting to you. In some cases, agents schedule repairs on their own, email you the weekly financial exception reports, and offer recommendations for system improvement for the next cycle.
- Many TMS vendors and accounting/financial systems bake in AI functionality like this – see what your vendor has.

5

Leadership



Lead the workforce transformation

What becomes the new definition of valuable work?

Augment

Remove friction, not headcount. Discuss “how do we help our people” instead of staff reduction

Experiment

Create a safe environment to test and share. Encourage ideas and experimenting within your guardrails

Celebrate

Make practical wins visible.

Redesign

Change workflows and how work gets done, not just tools.

Reskill

Build judgment, verification, and data literacy. Foster comfort with thinking and working differently.

Technology adoption becomes transformation only when work changes.

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