

The “Moving Forward” Framework

A 4-step blueprint for adopting tech without the chaos

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Tech shouldn’t feel like another load to carry

When we asked IAM what members want to hear about, the answer was simple: tech as a whole is a challenge.



Too many options

Every tool claims to do everything. Where do you even start?



Too much jargon

APIs, integrations, AI models. It’s hard to tell what matters for a mover.



Too risky to commit

One bad contract means lost money, lost time, and a team that stops trusting new tools.

LIVE POLL Biggest tech frustration? Too many tools · Staff won’t use it · Don’t know what to buy · Security

Four steps, one security thread

1

Clear the clutter, fuel the future

Cut what's slowing you down and costing you

2

Vet vendors

Ask the questions that matter before you sign

3

Plan the rollout

Get your people to actually use the new tool

4

Layer in AI

Help your team do more, safely



Running through every step: data security and compliance

Including CMMC for movers who handle Department of War (DoW) moves, and what's changed in the last few months.

Step 1: Clear the clutter, fuel the future

Clutter is anything your business keeps carrying that slows it down: manual workarounds, duplicate entry, and outdated or “free” tools.

Why it hurts

- Eats into your margins, hour by hour
- Causes re-keying errors and missed deliverables
- Wears out your team and frustrates customers
- Leaves gaps in your data security

It rarely shows up as a line on your P&L, so it’s easy to keep carrying.



Re-keying that creates errors



Spreadsheets run a core process



Status checks by phone and text



Paper re-typed after the job



Missed deliverables and follow-ups



Shared logins, ex-staff still have access

Spot the clutter: follow one move



At every stage, ask: Who touches it? Where does it get re-keyed? What could slip through the cracks?

Put a dollar figure on your clutter

Hours lost per week × loaded hourly rate × 52

Then add errors that become claims and deliverables that slipped.

Define your finish line

What results do you want when adoption is done? Plan your workflows around those results, and make sure your provider has a clear way to get you there.

Step 2: Vet vendors before you sign

Make every vendor answer these in writing, including the ones you already use.

All-in-one

Does it cover your whole operation, or just parts of it?

Actionable data

Can you act on your data inside it, or is it just a data warehouse?

Compliance

What must you comply with, and does this get you there?

Network connectivity

Can you work with agents and partners, not just your own shop?

Stability & partnership

How long have they been around? How stable are they?

Responsiveness

Do they have dedicated support staff? How accessible are they?

True cost

Per-user, per-transaction, or % of revenue? How does it scale as you grow?

Implementation

What's their plan? Can you test and train with test shipments?

Read the small print. Understand the full cost model as you add seats, locations, or a new line of business.

Do your homework before the demo



Who to ask

- Peers who’ve made a switch: ask for recommendations
- Your associations: which vendors are members and partners?
- Who regularly shows up and engages in your association meetings
- Current customers your size, with your move types



Who to bring

- Subject matter experts from each team, not just leadership
- The people who will use it every day
- Your lead point of contact who will own the rollout

Bring your finish line from Step 1 to every demo: can this provider show you how they’ll get you there?

Red flag or green flag?

You ask	Red flag	Green flag
What will this cost as we grow?	*“Our pricing is simple, don’t worry.”*	*“Here’s the full model: every fee, per seat and per location, in writing.”*
How fast do you respond when something breaks?	*“Just submit a ticket.”*	*“A dedicated support team, known staffing hours, and named points of escalation, should it be needed.”*
Can we act on our data in the system?	*“You can export it all to Excel.”*	*“Reports and dashboards right where your team already works; automations; notifications; action triggers.”*

Step 3: The Reality of the Rollout

Don’t try to boil the ocean. Start with what matters most, and roll out in phases, where that makes sense.

Phase it

1. **Your most important workflow**
   The one with the most clutter, pain, cost of not remedying
2. **The next priority**
   Once phase 1 is steady and your team is comfortable
3. **Run the cycle again**
   Re-check for clutter, then take on the next piece

Build your rollout team

- **One lead Implementation POC at the top**
  Owns gathering guidance & decisions, and stays firm & clear to the plan & mutually agreed upon goals
- **A POC in every team**
  The go-to person for questions needing clarity for that area of expertise (Billing, Dispatch, Sales, etc.)
- **Hands-on experts**
  Subject matter experts, not just leadership

Roll out in a loop



Make it stick, without the stress

Change is stressful. Make it feel safe to learn, ask questions, and make mistakes.

Keep it clear and small

Only what each person needs now. Don’t overwhelm your staff.

Make it hands-on

Role-play for real: run a digital inventory on your office furniture.

Gamify it

Prizes and friendly competitions for coordinators, drivers, and crews.

Welcome feedback

They use it every day, so they’ll spot what you don’t. Listen and act.

Measure adoption

Logins, jobs in the system, side spreadsheets retired.

Celebrate your team

Recognize the people who embrace the new tools, publicly.

Step 4: The AI Layer

Start with three questions. If your software was built for movers, not retrofitted, its AI is ready from day 1.

1

Where is AI already at work in your system?

Smart dispatch, container optimization, weight ticket reading, translating handwritten documents, and more.

2

Who on your team would benefit most?

Anyone who heavily needs to analyze or compose emails, quotes, customer updates, etc. Also for timely decision confidence with leadership and ops. Etc.

3

Can your tech partner show you where to use it next?

A good partner brings ideas for where AI fits your business, not just a feature list, and can advise with proactive insights.



Security first: business AI isn't personal AI. Your contracts and compliance obligations decide what data it can touch.

LIVE POLL Where is your company with AI? Not using it · Some people on their own · Approved tools · Built into our systems

Know where your data goes before AI touches it

1. Ask your vendor

- Does our data ever leave our system?
- Is it sent to an outside AI provider?
- Is it used to train anyone's models?
- Who can see what the AI sees?
- Does it meet our contract and compliance requirements?
- Can we control it by user and role?

2. Vetted and safe? Put it to work

- Smart dispatch and crew suggestions
- Container and load optimization
- Reading weight tickets and handwritten docs
- Answering and/or analyzing calls
- Drafting messages, summarizing notes
- Spotting trends in your data

3. Not safe? Protect yourself

- Keep customer, payment, and other sensitive data out of it, if that data flows outside your company "walls," even if for processing answers.
- Lock down who can use it, and for what
- Switch to a tool that keeps your data protected

The answers decide what you can put in. And whatever the tool, a person reviews before anything goes to a customer, crew, or agency.

BONUS CONSIDERATION - CMMC: does it touch your business?

CMMC LEVEL 2
SELF-ASSESSMENT DUE

MARCH 1 2027

DoW-approved TSPs that miss it go into non-use.

Whoever touches DoW shipment data

TSPs
Required to self-assess all 110 controls and post your score in SPRS.

Agents
Working DoW moves for a TSP? The PPA has confirmed this applies to you, as well, if you receive CUI.

Drivers & crews
Phones, apps, and paperwork with member CUI/data are in scope for this mandate.

Vendors
Store or process shipment data/CUI? The PPA has confirmed that CMMC Level 2 applies.

Get started this month

1. Educate yourself & score all 110 controls; plan the gaps
2. Get the Assessment & Scoping Guides
3. Vet your software; find compliant tools
4. Quick wins: MFA, own logins, offboarding
5. Begin immediately; give yourself time to make needed adjustments
6. Post your score in SPRS; an official affirms

Sources: DoW Personal Property Activity Advisory 26-0087 (May 2026) and PPA CMMC FAQ (Aug 2026). Third-party assessments are suspended; self-assessments are not. Not legal advice.

Your CMMC safety bubble



Playing your part isn't enough.

If anyone who touches your DoW shipment data/CUI leaves a gap, your business is exposed.

Be your network's CMMC champion. It's a win-win: when you take the first step, it's easier for everyone, and the earlier you start, the better.

1. List every partner and system that touches DoW shipment data
2. Ask each one for their SPRS status or proof of compliance
3. Put the requirements in your agent and vendor agreements
4. Share the self-assessment guide and check in before March 1
5. Choose software with compliance built in, not bolted on

EDC® CMMC Solutions builds compliance features directly into EDC® software.

Your next 90 days

30 First 30 days

- Run the Step 1 audit; cost your clutter
- Define your finish line
- Ask your vendors the AI privacy questions
- DoW moves? Score all 110 controls

60 Days 31–60

- Do your homework: peers and associations
- Vet your current software and options
- Pick phase 1; name your POCs
- DoW moves? Ask your network for SPRS status

90 Days 61–90

- Roll out phase 1: adopt, train, role-play
- Measure adoption; celebrate wins
- Ask your provider where AI fits next
- DoW moves? Post your SPRS score early

Questions?

Get the full Moving Forward Toolkit

Clutter Finder, readiness scorecard, vendor checklist, rollout plan, AI data rules, and CMMC software solutions.

Email connect@edcus.com to get your copy.

About EDC®

Throughout more than 25 years, EDC® has been recognized for innovative and secure software solutions for the moving and storage industry, serving movers of every size and move type around the world. Our solutions include EDC-MoveStar® – sales, move, & operations management; MERXED™ AI – secure, private, & CMMC compliant AI; EasyDPS® – the industry standard for DoW TSPs & SCAC management; EDC-AgentLink® – connecting agent networks and shipment management; GOgistiX® – the industry-unifying, CMMC compliant data exchange network, connecting movers, jobs, services, & data/docs/updates; and EDC® CMMC Solutions, compliance features included in all of these software solutions.

Your presenters

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