1. Carrier Qualification Checklist

A. Basic Carrier Information

Before contacting a carrier, collect:

- [ ] Legal company name
- [ ] DBA name
- [ ] Owner or decision-maker name
- [ ] Phone number
- [ ] Email address
- [ ] Website
- [ ] MC number
- [ ] USDOT number
- [ ] Home base/location
- [ ] Number of power units
- [ ] Number of drivers

B. Authority and Compliance

Verify:

- [ ] Active operating authority
- [ ] Interstate authority
- [ ] Authority age
- [ ] Company is not out of service
- [ ] MC authority is active
- [ ] Insurance appears active
- [ ] Cargo insurance is adequate for the freight they intend to haul
- [ ] No obvious compliance red flags

Ideal Prospect Example

For a dispatch service targeting established owner-operators:

Active MC Authority + 12 months or more in business + 1–5 trucks + OTR capability

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C. Equipment Qualification

Identify exactly what equipment they operate.

- ☐ 53' dry van – new dispatchers
- ☐ 53' reefer – new dispatchers
- ☐ Flatbed – new dispatchers
- ☐ Step deck
- ☐ Box truck
- ☐ Hotshot
- ☐ Cargo van
- ☐ Power only

Also determine:

- ☐ Number of trailers
- ☐ Trailer dimensions
- ☐ Weight capacity
- ☐ Pallet capacity
- ☐ Liftgate availability
- ☐ Reefer capability
- ☐ Hazmat capability, if applicable

Do not assume the carrier can haul every type of freight.

D. Operating Preferences

Before selling your service, determine:

- ☐ Local
- ☐ Regional
- ☐ OTR
- ☐ Preferred states

- [ ] States they avoid
- [ ] Preferred lanes
- [ ] Home-time requirements
- [ ] Minimum acceptable rate
- [ ] Maximum deadhead
- [ ] Weekly mileage goal
- [ ] Weekly gross revenue goal

Example Questions

“What areas do you prefer running?”

“Are there any states or freight markets you absolutely avoid?”

“How often do you need to be home?”

“What is your maximum comfortable deadhead?” 100 miles or less

“What would make a dispatch relationship successful for you?”

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2. Carrier Need Assessment

You should identify **why they might need you**.

Potential pain points:

- [ ] They are dispatching themselves
- [ ] They are spending too much time searching for loads
- [ ] Their truck experiences too much downtime
- [ ] They have excessive deadhead
- [ ] They are unhappy with current rates
- [ ] They struggle to find reloads
- [ ] They do not like negotiating with brokers
- [ ] They need help communicating with brokers
- [ ] They are growing their fleet – scaling up, not down. Adding assets to their trucking company.
- [ ] They are unhappy with their current dispatcher

Key Question

“What is the biggest challenge you're currently experiencing when it comes to finding and managing freight?”

Their answer tells you what to sell.

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3. Carrier Financial Fit

Not every carrier is a good dispatch client.

Try to understand:

- ☐ Weekly gross revenue
- ☐ Revenue goals
- ☐ Minimum weekly freight requirement – per equipment type
- ☐ Minimum rate per mile expectations – per equipment type
- ☐ Fuel cost concerns
- ☐ Factoring company, if applicable
- ☐ Cash-flow challenges

The goal is not necessarily to obtain sensitive financial information.

The goal is to determine whether your dispatch strategy can realistically help them.

4. Carrier Prospect Scoring System

You can score prospects before investing significant time.

Qualification Area	Score
Active authority	10
12+ months authority	10
Equipment matches your specialty	15
OTR capable	10
1–5 trucks	10
Clear need for dispatching	15
Owner is decision-maker	10
Valid contact information	10
Open to discussing dispatch	10

Score Interpretation

80–100: High-priority prospect
60–79: Good prospect
40–59: Follow-up prospect
Below 40: Low priority

FREIGHT DISPATCHER CREDIBILITY CHECKLIST

Before approaching carriers, make sure your own business looks prepared and professional.

1. Business Foundation

Have:

- ☐ Legal business name
- ☐ Registered business entity, if applicable
- ☐ EIN, if applicable
- ☐ Business bank account
- ☐ Professional business email
- ☐ Dedicated business phone number
- ☐ Professional voicemail
- ☐ Website or professional landing page

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2. Professional Online Presence

Your website should clearly answer:

Who do you dispatch?

For example:

Owner-operators and small carriers operating dry vans, reefers, and flatbeds.

What do you do?

Clearly list:

- Load searching
- Rate negotiation
- Broker communication
- Dispatch coordination
- Reload planning
- Route assistance
- Appointment management
- Detention and layover follow-up
- Document support

Why should they choose you?

You need a clear value proposition.

For example:

We help owner-operators and small carriers spend less time searching for freight and more time focusing on safely operating and growing their transportation businesses.

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3. Dispatcher Service Agreement

Before onboarding your first client, prepare a professional agreement covering:

- [ ] Services provided
- [ ] Dispatcher compensation
- [ ] Payment terms
- [ ] Carrier responsibilities
- [ ] Dispatcher responsibilities
- [ ] Confidentiality
- [ ] Termination procedures
- [ ] Dispute procedures
- [ ] Communication expectations

Consider having your agreement reviewed by a qualified transportation attorney.

4. Carrier Onboarding Package

Prepare an organized onboarding system.

You may need:

- [ ] Dispatcher-carrier agreement
- [ ] Carrier information sheet
- [ ] Equipment profile
- [ ] Preferred lane profile
- [ ] Home-time requirements
- [ ] Rate expectations
- [ ] Deadhead limits
- [ ] Preferred broker requirements
- [ ] Emergency contact information
- [ ] Payment information for your dispatch fee

The easier your onboarding process is, the more professional your company appears.

5. Load-Booking and Dispatch System

Before signing clients, know exactly how you will manage freight.

Create a process for:

Step 1: Check truck availability
Step 2: Search available freight
Step 3: Calculate deadhead
Step 4: Evaluate total miles
Step 5: Negotiate with broker
Step 6: Verify load details
Step 7: Present load to carrier when required
Step 8: Obtain approval
Step 9: Secure rate confirmation
Step 10: Send load information to driver
Step 11: Track pickup and delivery
Step 12: Plan the next reload

6. Broker Verification Process

A carrier will trust you more if you can explain how you protect them from bad freight opportunities.

Have a written broker screening process that includes:

- [ ] Verify broker authority
- [ ] Confirm broker contact information
- [ ] Review available credit/payment information
- [ ] Check for credible reports or complaints
- [ ] Watch for double-brokering indicators
- [ ] Review the rate confirmation carefully
- [ ] Confirm detention terms
- [ ] Confirm layover terms
- [ ] Confirm TONU terms
- [ ] Confirm pickup and delivery requirements

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7. Rate and Profitability Analysis

Before booking freight, you should be able to calculate:

- [ ] Loaded miles
- [ ] Deadhead miles
- [ ] Total miles
- [ ] Gross revenue
- [ ] Revenue per loaded mile
- [ ] Revenue per total mile
- [ ] Estimated fuel cost
- [ ] Tolls
- [ ] Other trip costs

Important Formula

Revenue per Total Mile = Gross Load Revenue ÷ (Loaded Miles + Deadhead Miles)

This is often more meaningful than looking only at the advertised rate per loaded mile.

8. Communication Standards

Create service standards such as:

- [ ] Return calls promptly
- [ ] Respond to urgent problems quickly
- [ ] Keep carrier updated about changes
- [ ] Confirm appointments
- [ ] Communicate professionally with brokers
- [ ] Document important conversations
- [ ] Never misrepresent carrier availability or authority

Your reputation can grow—or disappear—based on communication.

9. Social Proof and Credibility

Build proof that you understand the industry.

Possible credibility assets include:

- [ ] Client testimonials
- [ ] Google reviews
- [ ] Video testimonials
- [ ] Case studies
- [ ] Educational content
- [ ] Professional social media
- [ ] Industry training or certifications
- [ ] Demonstrated market knowledge

If you are new, do not pretend to have years of experience.

Instead, demonstrate competence through your **process, knowledge, professionalism, and transparency**.

10. Your Dispatcher “Ready-to-Sell” Checklist

Before calling your first carrier, you should be able to confidently answer:

- [ ] Who do I serve?
- [ ] What equipment do I specialize in?
- [ ] What areas do I cover?
- [ ] How do I find freight?
- [ ] How do I negotiate rates?
- [ ] How do I screen brokers?
- [ ] What is my fee?
- [ ] When do I get paid?
- [ ] What happens if the carrier wants to cancel?
- [ ] How quickly do I respond?
- [ ] What makes my service different?

The Best Way to Use These Checklists

Create a **carrier prospecting system** with three stages:

Stage 1: Prospect

Find and qualify carriers.

Stage 2: Diagnose

Identify their equipment, lanes, goals, and pain points.

Stage 3: Present

Explain specifically how your dispatch service solves their problem.

Simple Sales Formula

Qualified Carrier → Identify Pain Point → Present Specific Solution → Build Trust → Follow Up → Onboard

The strongest dispatch businesses do not try to convince every carrier to become a client. They focus on finding carriers whose **equipment, operating preferences, business goals, and dispatch needs** are a good fit for the service they provide.