1. Shipper Qualification Checklist

Use this to determine whether a prospect is worth pursuing **before spending too much time calling and emailing them**.

Company Information

- [ ] Legal company name
- [ ] Website
- [ ] Physical locations
- [ ] Number of facilities
- [ ] Years in business
- [ ] Industry
- [ ] Products they manufacture or distribute
- [ ] Estimated company size

Freight Profile

- [ ] What products do they ship?
- [ ] How frequently do they ship?
- [ ] Full truckload, LTL, or both?
- [ ] Primary equipment needed
- [ ] Dry van
- [ ] Reefer
- [ ] Flatbed
- [ ] Box truck
- [ ] Specialized equipment
- [ ] Hazmat requirements
- [ ] Temperature-control requirements

Lane Information

- [ ] Primary pickup locations
- [ ] Primary delivery locations
- [ ] Most frequent lanes
- [ ] Difficult lanes
- [ ] Backhaul opportunities
- [ ] Regional or OTR freight

- [ ] Seasonal shipping patterns

Transportation Pain Points

Look for prospects experiencing:

- [ ] Primary carriers rejecting loads
- [ ] Last-minute truck shortages
- [ ] High freight costs
- [ ] Poor carrier communication
- [ ] Late pickups
- [ ] Late deliveries
- [ ] Seasonal capacity problems
- [ ] Difficult lanes
- [ ] Emergency freight
- [ ] Rapid company growth
- [ ] New warehouse openings
- [ ] New distribution centers

Decision-Maker Information

- [ ] Transportation Manager
- [ ] Logistics Manager
- [ ] Supply Chain Manager
- [ ] Shipping Manager
- [ ] Operations Manager
- [ ] Procurement Manager

Collect:

- [ ] Name
- [ ] Title
- [ ] Email
- [ ] Phone number
- [ ] LinkedIn profile
- [ ] Best time to contact

Opportunity Score

A prospect is especially valuable if they have:

Recurring freight + transportation problems + accessible decision-maker + equipment that matches your carrier network.

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2. Freight Broker Credibility Checklist

Before approaching shippers, make sure your brokerage can pass their credibility test.

Legal and Compliance

- ☐ Active broker authority
- ☐ Active MC number
- ☐ Required FMCSA filings completed
- ☐ BMC-84 or BMC-85 active
- ☐ Process agent filing active
- ☐ Business entity properly registered
- ☐ EIN established
- ☐ Business bank account
- ☐ Required state registrations completed

Insurance and Risk Management

- ☐ Carrier insurance verification process
- ☐ Minimum auto-liability requirements established
- ☐ Minimum cargo insurance requirements established
- ☐ Contingent cargo coverage considered
- ☐ Carrier safety verification process
- ☐ Claims procedure established

Carrier Network

- ☐ Verified carrier database
- ☐ Active dry-van carriers
- ☐ Active reefer carriers
- ☐ Active flatbed carriers
- ☐ Owner-operators
- ☐ Small fleets

- [ ] Backup carriers for important lanes
- [ ] Carriers organized by equipment and geographic lane

Carrier Verification

Before assigning a carrier, verify:

- [ ] Active operating authority
- [ ] USDOT number
- [ ] MC number
- [ ] Insurance
- [ ] Cargo coverage
- [ ] Safety information
- [ ] Equipment
- [ ] Identity of carrier
- [ ] Contact information
- [ ] No obvious double-brokering concerns

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3. Sales and Professional Credibility

Before contacting a shipper, have:

- [ ] Professional company email
- [ ] Professional website
- [ ] Company phone number
- [ ] Professional voicemail
- [ ] Clear value proposition
- [ ] Shipper capability statement
- [ ] Broker information packet
- [ ] Carrier network summary
- [ ] Service-area map
- [ ] Equipment capabilities
- [ ] Testimonials or references, if available

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4. Operational Readiness

Ask yourself:

If the shipper gives me a load today, am I ready?

You should have:

- [ ] Load intake process
- [ ] Carrier sourcing process
- [ ] Rate negotiation process
- [ ] Rate confirmation process
- [ ] Tracking procedure
- [ ] Pickup confirmation procedure
- [ ] Delivery confirmation procedure
- [ ] POD collection process
- [ ] Detention process
- [ ] Layover process
- [ ] TONU process
- [ ] Claims process
- [ ] Carrier payment process
- [ ] Shipper invoicing process

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5. Your Shipper Sales Message

Your brokerage should be able to clearly answer:

Who do we help?

What type of shippers do we serve?

What problem do we solve?

Capacity, difficult lanes, overflow freight, last-minute loads, specialized equipment, etc.

Why should they use us?

What makes us different from other brokers?

How do we cover their freight?

Explain your carrier network and sourcing capabilities.

What happens when there is a problem?

Explain your communication and recovery process.

A Strong Broker Credibility Formula

COMPLIANCE + CARRIER CAPACITY + INDUSTRY KNOWLEDGE + COMMUNICATION + PROBLEM-SOLVING + CONSISTENT EXECUTION = SHIPPER TRUST

The ultimate goal is to make a shipper feel comfortable enough to say:

“I don't know this broker very well yet, but I trust them enough to give them one load.”

Once you successfully move that first load, your job is to turn it into **repeat freight and a long-term shipper relationship**.