

THE MOST COMPREHENSIVE
GUIDE TO BUILDING YOUR
OWN FREIGHT BROKERAGE
FROM THE GROUND UP

THE FREIGHT BROKER MANUAL

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HEY THERE SOON-TO-BE FREIGHT BROKER!

Alex here. I'm the CEO of AKLogistix, a 7-figure freight brokering company based in Texas. My business serves thousands of shippers and carriers internationally and operates around the clock to close major deals, give great customer service, and operate smoothly.

Congratulations on investing in Freight Broker Mastery and taking the first step toward changing your life through this lucrative industry.

It doesn't matter where you come from or what your previous experiences are — you *can* succeed at brokering. Even if you know absolutely nothing about trucking or brokering and are brand new to the industry, don't worry. A couple years back, I was there too...

MY STORY - AND HOW YOU CAN DO IT TOO...

Just a few years ago I was working at a sales job and had the opportunity to start driving a truck for an oil company, delivering large equipment to work sites. I seized the opportunity (just like you're doing right now with this course) and decided to get my Class A Commercial drivers license. This was the beginning of a journey that took me from making on average \$40,000 a year as an employee to over \$1,000,000 a year as an entrepreneur.

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After I got my Class-A CDL, I decided to buy my own truck and trailer and start serving local businesses who needed their goods shipped. And I quickly got customers.

Within a year I had two trucks, two trailers, two in-house drivers, and a salaried employee. I couldn't believe what I had built in just twelve months.

But there was one big problem standing in my way: I couldn't take on as much business as I wanted to. I only had two trucks and two trailers. So if someone called and needed something moved that day but my drivers were already booked, or if it required a type of truck I did not have, I lost that sale.

Then a light bulb went off in my head and it was clear to me that to keep the sale, I had to outsource and hire other companies like mine to do the job. That's when I decided to start freight brokering instead of moving the products myself.

A freight broker is the middleman between the drivers and the shippers.

It means that if someone needs something shipped in my network of shippers, I have a network of carriers (not trucks that belong to me) who can move that product right away. And I make a percentage of that sale.

When I got into brokering, major shifts happened:

- I was no longer capped out on my time or the capacity of my team
- I could make unlimited sales and move unlimited shipments
- I was able to leverage other people's resources
- I could automate my business 24/7

Want to see what this looks like?

Read this quick story.

When I had two trucks and was shipping equipment myself, I was working with a large international company – United Rentals – managing a few of their local branches in the United States.

When I became a broker, I suddenly had a much bigger capacity and was able to take on all of their branches in the United States and Canada. This multiplied my revenue automatically and required almost no extra assets.

All I had to do was pick up the phone and coordinate the drivers.

Compared to trucking? It was cake.

Essentially, brokering leads to expansion and having the opportunity to scale quickly.

What's great about being a broker is the opportunity to equally serve shippers and carriers. You will provide so much value to **everyone** in the marketplace. I've never seen so many *happy* shippers and truck drivers. And having those relationships on both sides of the coin makes sales automatic.

While brokering seems easy and profitable, it's essential to remember that the beginning of your journey is always going to be the toughest. You profit from 100% commission, so getting used to being an entrepreneur in the beginning without a consistent salary can be difficult for many.

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I suggest having enough savings for 3 to 6 months, as this is how long it takes on average to start making money from brokering. But the key is to have patience during this initial period. Your success depends on you being focused, hustling, making consistent phone calls, and putting in the work. This is not a get rich quick scheme.

The good news? Once you start making income, it won't really go backward from there. Trust me that you will get your opportunity if you stick with it.

UNDERSTANDING THE BASICS:

WHAT IS A FREIGHT BROKER?

A freight broker is the person in the middle between the shipper and the truck (aka carrier). They have access to the people who have trucks and they're able to quickly arrange the shipment.

Here's an example:

Shipper: Alex, will you move my product for \$1000 for me?

Alex: Sure!

Alex: Driver, can you move this product for me for \$800?

Driver: Sure!

Commission for Alex: \$200

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YOU CAN REPEAT THIS MODEL FOR HUNDREDS OF BUSINESSES MULTIPLE TIMES A DAY WITHOUT REQUIRING ANYTHING MORE THAN A SMARTPHONE. THAT'S HOW BROKERING WORKS.

HOW MANY CUSTOMERS CAN YOU HAVE AT A TIME?

As a broker, all you need is a handful of customers who need repeat business. Let's say you have 100 customers who all need you to move something once a month. Or 5 customers who need something 3 times a day. It's up to you.

There's a big world and a lot of things moving, every single day.

It's all about finding your niche and maximizing profit from it.



DO YOU NEED AN OFFICE TO BE A FREIGHT BROKER?

HAVING A PHYSICAL OFFICE ISN'T ESSENTIAL — WHAT IS ESSENTIAL IS THAT YOU HAVE A COMMUNICATIONS SYSTEM IN PLACE SO THAT YOU CAN MAKE AND RECEIVE UNLIMITED CALLS. (SIDE NOTE: THERE IS SUCH A THING CALLED A VIRTUAL OFFICE!)

Here are the must-haves when creating your “office,” even if it’s a home office:

- A high-functioning computer
- Strong WiFi
- A phone (smartphone is always best)
- Filing system (it’s up to you if you want to have a physical filing cabinet or use something like Google Drive to manage your business)
- Email address and a website

THE IMPORTANT THING IS TO STAY ORGANIZED. SOME OF THE TOOLS I USE ON A DAILY BASIS IN MY “OFFICE” ARE:

- Gmail and the rest of the free tools in GSuite (Docs, Sheets, etc.)
- Quickbooks Online - not free, but I prefer it. Zipbooks is a free option.
- Broker Software - there are tons out there; AscendTMS is a free option.
- GoogleDrive - spreadsheets for load tracking, AgileCRM is another free option.

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THE MINDSET OF AN ENTREPRENEUR

IT'S NOT GOING TO BE EASY IN THE BEGINNING. BUT IT'S WORTH IT. TRUST ME. YOU HAVE TO STICK WITH IT, AND YOU HAVE TO HAVE PASSION.

Understand that nothing is typically gonna' go the way it should or work out perfectly.

You have to expect some things to just come up during shipments in transit. If a move goes 100% according to plan from start-to-finish... that's not normal!

Now if there are changes, updates, address changes, issues before, during, or after shipment... THAT would be completely normal!

So learn to roll with it instead of freaking out.

Constantly strengthen the following skills as you build your business

- Taking responsibility for your successes and failures
- Trusting yourself to make decisions with power
- Trusting others to help you grow and scale
- Approaching your business with humility and open-mindedness

Here are some things I tell my students regularly to constantly upgrade their mindset for success:

- Always keep your word to others and yourself
- Failures are not failures – just experiences that pull you closer to your goals
- Pain equals progress, so embrace growing pains
- Practice integrity & honesty in every move you make
- Be persistent and never give up
- Always stay solution-focused, not problem-focused
- See problems as opportunities for growth



AS YOU'RE GETTING STARTED WITH YOUR BUSINESS, IT'S GOING TO BE CHALLENGING.

And you might have friends and family scratching their heads, saying things that aren't exactly encouraging about your new business. A lot of people look at entrepreneurs like they're out of their minds. They just can't understand why anybody would want to leave the "security" of being an employee.

That's why you're now a member of my community, as part of this course.

If you have any issues with the above, if you're struggling with getting your mind in the right place to do your best work, or if you just have a random question, reach out in the community. Start a thread. Ask questions. Don't be afraid to reach out.

Everybody struggles in the beginning. You're not alone.

Here are two books I recommend you read over the next few months:

- *How to Win Friends and Influence People* by Dale Carnegie
- *The 10X Rule* by Grant Cardone

If you like listening more than reading, that's cool too. You can listen to the audio versions of those books, or you can listen to podcasts. Here are a few top-rated podcasts for getting into a business owner's mindset:

- *The GaryVee Audio Experience*
- *The Tim Ferriss Show*
- *Millionaire Mindset*

THE IMPORTANT THING HERE IS TO SURROUND YOURSELF WITH POSITIVE MEDIA THAT'S GOING TO HELP YOU GROW AND MOVE FORWARD IN YOUR BUSINESS.

AS MUCH AS YOU CAN, YOU NEED TO START LIMITING YOUR EXPOSURE TO NEGATIVE MEDIA OR MEDIA THAT DOESN'T GET YOU CLOSER TO YOUR GOAL. YOU CAN FOCUS ON WATCHING TV OR KEEPING UP WITH THE NEWS *AFTER* YOU BUILD YOUR BUSINESS.

FOR NOW, FOCUS ON DEVELOPING YOURSELF.

GETTING STARTED WITH BUSINESS STRUCTURE

First, choose a business name.

You have the creative freedom to choose what you want here – it can be your name, or any other idea that you want your business to have.

The only thing you have to look out for when choosing a name are that the name is unique to you and isn't held by someone else already. You can easily identify if your name is available by conducting a country or state search online.

Next, register your business type.

There are tons of options, but I recommend registering as a Corporation.

IF YOU DO NOT WANT TO REGISTER FOR INCORPORATION STATUS, HERE ARE ALL OF YOUR OPTIONS (NOTE, IT IS ALWAYS BEST TO CONSULT WITH A CPA ON THE MATTER IF YOU ARE ABLE TO)

- CORPORATION OR S-CORP
- PROPRIETORSHIP
- LIMITED LIABILITY COMPANY (LLC)
- UCR REGISTRATION
- SUB CHAPTER S CORPORATION
- SCAC CODE REGISTRATION

To register your business as a Corporation, you'll need to file paperwork with your state. This varies by state, but you can find the information you need pretty easily by searching "register as corporation in (STATE NAME).

You also have to apply for a Federal Identification Number (FEIN or Federal EIN). That's a number you get from the IRS for your taxes.

You can apply for one at the link below.

<https://irs-taxid-numbers.com/fein/>

You need a FEIN in order to apply for your license as a broker, so don't skip this step.

A NOTE ON PARTNERSHIPS:

If you are thinking of going into a partnership with someone else to run this business, it's essential to have a partnership agreement for the two parties to sign. The document should include the list of responsibilities and expectations of each party, so that there are no problems early on in your business. You may want to involve them when you're filing the paperwork for your corporation with your state.



A NOTE ON ACCOUNTING:

You must have a separate business account for your brokering business so that your personal expenses (or, if you have another business, other business expenses) do not interfere with your brokering business expenses and transactions.

Keep these separate and organized. Start the separate account now, before you take any further action in your business. It will make things easier later. All transactions related to your brokering business should go through a single account.

GETTING YOUR LICENSE AS A FREIGHT BROKER

The first step in getting Operating Authority as a broker is to fill out FMCSA's application for Motor Property Carrier and Broker Authority Form (OP-1).

"What's an Operating Authority, Alex?"

Glad you asked!



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OBTAINING OPERATING AUTHORITY

In order to operate as a freight broker, you have to obtain Operating Authority.

(It's basically like a license to do all this stuff.)

The type of authority that's granted to you by the Federal Motor Carrier Safety Administration (FMCSA) is also referred to as an "MC" number.

Operating Authority dictates the type of operation a company may undertake the cargo it may carry, and the geographical area in which it may legally operate.

COSTS FOR OBTAINING AN OPERATING AUTHORITY

Separate filing fees will be submitted to the individual Operating Authority that's granted to you. The cost is \$300 for submitting the OP-1 form, and \$50 for filing the BOC-3 form.

You're probably wondering what those forms are, though.

To apply for broker authority, you have to submit three forms to the FMCSA:

FORM 1: OP-1 FORM

Form OP-1 is the main application for broker authority and to obtain an MC number.

You need to have your FEIN and your business set up before you apply.

The FMCA will prompt you on the application portal to provide the FEIN and the names and titles of your company's officers (that means you, or you and your business partner) so if you haven't gotten that all set up yet, go back and do that.

When you're ready, you can apply online at <https://www.fmcsa.dot.gov/registration>

There are clear directions on their site for filling out the application, so don't get overwhelmed. Just follow the instructions.

If you get confused, throw a post in the group and we'll help you through it.

Having Broker Authority is required to operate as a legal freight broker within the United States, so don't skip this step.

Like I said earlier, there is a \$300 non-refundable fee for submitting the OP-1 form. On average, it takes four to six weeks to learn if your application has been accepted. Look out for a letter from FMCSA with your MC number listed. After that, you'll receive a final authority letter a few weeks later that confirms your acceptance.

FORM 2: BOC-3 FORM

Another essential aspect of your application is Form BOC-3 – Designation of Agent for Service of Process.

The people you select for this are also referred to as processing agents. They are people who act as the responsible legal party on your behalf in every state you operate in.

This proves that you're prepared to take action and responsibility if something goes wrong in your business: no matter where it happens, whether you're actually physically present or sitting on a beach, running your business from your phone.

There is a \$50 filing fee for this form.



FORM 3: BMC-84 OR BMC-85

The next form you have to submit is the BMC-84 or BMC-85, which proves that you have purchased a surety bond (BMC-84) or trust fund (BMC-85) for \$75,000.

You will not be granted Operating Authority if you cannot prove Financial Responsibility, and submitting this form proves that you have protection as a broker.

It's important to note that your bond has to be maintained in order to have your operating authority. If you fail to do so or decide to switch bond options without reporting it, your operating authority will be revoked.

There is no filing fee for either the BMC-84 or BMC-85 forms – they're just legal requirements to prove that you're financially responsible for your business. But regardless you have 2 options here.

The first is if you have \$75k in cash, in which case that can be put into a trust and be 100% returned. If that's not possible, the other option is to pay for the 75 surety bond either weekly, monthly, quarterly, or yearly.

If you haven't submitted all three forms within 20 days of filing your original application, the FMCSA will issue you a notice that you have 60 days from the date of the notice to fulfill your full applications. So go ahead and get started here:

<http://www.fmcsa.dot.gov/registration-licensing/licensing/agents.htm>

You're ready to apply for broker authority when you have completed the OP-1 Form, BMC-84 or 85 Form, and BOC-3 Form.

THE FMCSA REVIEWING PROCESS OF YOUR APPLICATION

Like I mentioned before, once you complete your application for your broker authority, the FMCSA reviewing process will begin.

In your application, they're looking to ensure that the information you entered is correct and complete, and that you've met all of the above mentioned requirements to run a brokering business (the bond, etc). If your application is incomplete or if you didn't fulfill the above requirements, your application will be rejected.

If your application has mistakes or requires more investigation, the FMCSA will go through a vetting process that can take up to 10 weeks.

(That's why you need to double-check before submission.)

A quick note here: the FMCSA will not call you about your application. They will send you a letter. There is a note about fraud on the FMCSA site when you apply, but I'd like to mention it here as well.

Often, new applicants will get targeted by people trying to market their products and services to new brokers, saying they're "required."

If you receive a call or an email that seems "off" while you're waiting on your application approval, let us know in the group.

You may also want to report a fraudulent request for information to the DOT, by contacting the Office of Inspector General (OIG) Hotline at (800) 424-9071 or via their website at <https://www.oig.dot.gov/hotline>

You can also report aggressive or misleading marketers to the Federal Trade Commission at <https://FTC.gov/complaint>

STAYING COMPLIANT WITH ALL RULES AND REGULATIONS

Once you're accepted, it's time to learn the essential recording regulations in which you must conduct your business. You can find updated regulations at any time by going to www.fmcsa.dot.gov, but here are the most important points to remember.

You must keep a record of every transaction.

I recommend having a spreadsheet that allows you to track your customers, the addresses, the registration numbers of both your carriers and shippers, etc.

Specifically, your records need to contain:

- The name, address, and phone number of the shipper, and the carrier info
- The amount of compensation that you received (both for the complete deal and for the amount that you specifically made)
- Any additional expenses/transactions that took place separate from the direct deal

It's important to keep your transactions organized and on file for three years.

Technically, they are public records and can be requested if you're ever audited.

Keep them on securely file for at least three years, to cover your bases. And keep in mind, the IRS is not going to be very happy if your data goes missing somehow if you store everything in the cloud, so make backups on a regular basis just in case.

AN IMPORTANT NOTE ON MISREPRESENTATION:

As a broker, you are not permitted to do business or advertise under any name that isn't registered and permitted by your operating authority.

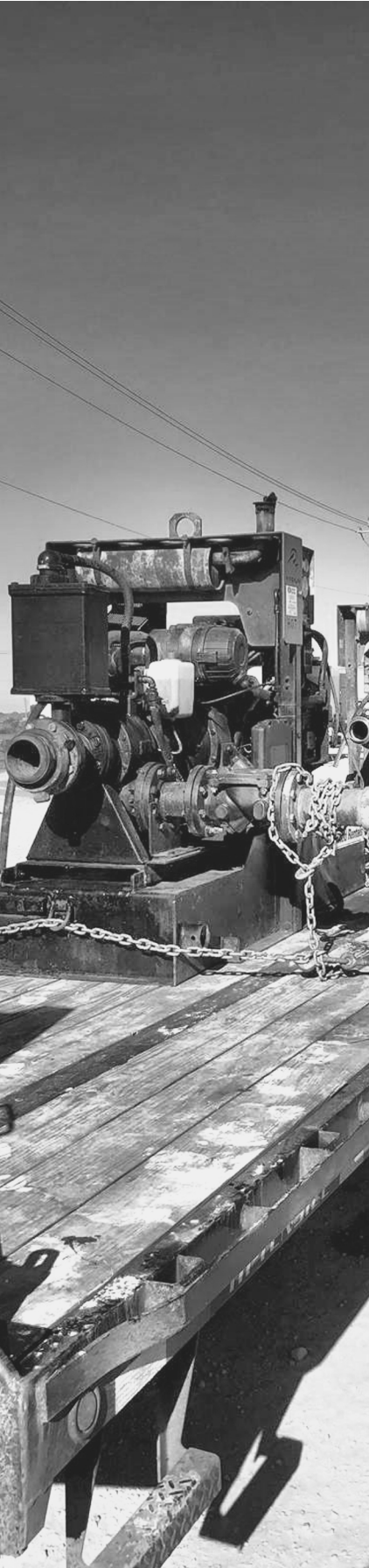
You also cannot represent your operations under the name of a carrier. It has to be under your registered name.

Basically, you're doing business as you, period. Don't mess around with this. Be ethical.

ACCOUNTING REQUIREMENTS

As I mentioned earlier in the "Getting Started" section, you must have a separate business account for your brokering business. All money that is used in this business needs to go through that account.

Make sure you have the separate account set up for it. It's required.



IDENTIFYING YOUR NICHE

WHY CHOOSE A NICHE?

Picking a niche can help your business stand out.

If you just say, “hey, I’ll ship anything,” that won’t really stick in people’s minds.

But if you become the go-to person for handling the shipment of flammable chemicals in your region and you brand your business logo with flames, then if someone needs flammables shipped, your name is more likely to pop into their brain.

PICKING A NICHE WILL MAKE IT EASIER TO STAY ORGANIZED.

If you ship anything and everything and you ship from anywhere to everywhere, you can get overwhelmed pretty easily. If you focus on one specific niche, you can cut down on stress there. You’ll be focused and clear as you start your business.

If you want to expand after you’ve been in business for a while, that’s fine. Just start out focused on one niche. It’s a lot easier to gain traction that way.

THERE ARE TWO MAIN THINGS TO CONSIDER WHEN NICHING: INTEREST AND PROFITABILITY.

First, think about your own interests.

What are you into? What do you like?

You could build an entire niche around cars, for example. If you're obsessed with cars, you can focus exclusively on brokering deals for moving car parts, lugging old cars, transporting new cars from manufacturer to dealers, etc.

You can do the same thing with steak. Think about everything that goes into eating a delicious steak at a high-end restaurant. Farming equipment and feed needs to be moved to raise the animals, the animals themselves might need to be moved, the meat has to get to the grocery store or the restaurant.

All you need to do is pick one piece of that puzzle and specialize in that. You could become the go-to person for transporting fresh and frozen meat from processing plants to restaurants in your state.

No matter what you're interested in, there's transportation involved.

Today's world is made up of complex supply chains. They already exist. You just need to figure out how you can best tap into that network and help people make deals for moving goods along that supply chain.

THE SECOND THING TO CONSIDER IS PROFITABILITY

Anything can be profitable. Like I said, there are supply chains for everything from steak to Lamborghinis. However, some niches are more profitable than others as a rule. Here are a few I know for a fact that are on the more profitable side:

Pharmaceuticals, medicines, oil, petroleum, temperature-controlled shipments, flatbeds, heavy haul, HAZMAT (hazardous materials such as chemicals, flammables, etc) – essentially anything that is of high value or requires a specialized piece of equipment to move.

UNDERSTANDING EQUIPMENT TYPES

When you're a broker, it's essential to understand the various equipment types so you can provide the right solutions to best serve your customers.

Once you pick a niche, it will make sense to familiarize yourself more with the specifics of each type of equipment you'll need for that specific niche, but here's an overview of a few main equipment types:

DRY VAN / BOX TRAILER:

These are extremely common, and most likely what you think of when you hear "tractor-trailer." They're long, enclosed trailers that sit behind a rig and they can carry almost anything.

REEFER (REFRIGERATED):

These are similar to Dry Vans, but they're temperature controlled. They're specialized pieces of equipment, less common, and often more profitable compared to Dry Vans.



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FLATBEDS AND STEPDECKS, R6N:

These are versatile. They aren't enclosed the way Dry Vans are, so they can accommodate large, irregularly-shaped loads as well as heavy items.

DRY BULK TRAILER (HOPPER)

These are giant containers for shipping bulk goods. They come in different sizes and can be used to transport anything from flour and sugar to industrial pellets and cement.

DOUBLE DROP

These are used for oversized freight, ie freight more than 10' tall. They contain a "well" with a lower deck height that is situated between a front and back deck.

FOR MORE DETAIL ON DIFFERENT EQUIPMENT TYPES (BECAUSE THERE ARE SEVERAL MORE TYPES), YOU CAN READ MORE USING THE LINKS BELOW. THEY ARE GREAT RESOURCES!

[HTTPS://WWW.GWTRANS.COM/FLATBED-TRUCKING-TRAILERS/](https://www.gwtrans.com/flatbed-trucking-trailers/)

[HTTPS://WWW.FREIGHTRATECENTRAL.COM/TRUCKING-COMPANIES/FLATBED-TRUCKING-TRAILER-TYPES](https://www.freightratecentral.com/trucking-companies/flatbed-trucking-trailer-types)

If you have issues or questions about equipment types after you've picked your niche and you don't see it covered at those links, make sure to ask in the group.

IMPORTANT NOTE ON OVERSIZED/OVERWEIGHT, WEIGHT LIMITS AND WEIGHT DISTRIBUTION:

What's classified as oversized and overweight can vary based on state.

As a broker, you need to be mindful of the limits in the state you're moving a load through. For Texas, where my brokerage is based, any time I hear "over 48,000 lbs" or "more than 8.5 feet wide," I know that load is going to need overweight permits and/or wide load permits.

If you're shipping stuff across state lines, you'll need permits in all of those states.

This can be costly in permits, so it's to your advantage to niche down to one region.

You also need to be mindful of any irregularities in weight distribution so that you can alert your carrier. When a load is irregularly shaped, it can require different hookups or types of hitches between truck and trailer, or between the trailers the truck is pulling in tandem.

This is the carrier's responsibility to handle, ultimately... but as the broker you need to be able to let the driver know when they'll need to account for an irregularly shaped or irregularly distributed load. The last thing you want to do to both the shipper and carrier is to have the truck show up without the necessary equipment/hitch.

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FINDING YOUR FIRST CUSTOMERS: SALES BASICS

All right.

You set up your “office.” You set up your business structure. You have your Operating Authority. You picked a niche and you have a basic grasp on the equipment types.

What’s left?

CUSTOMERS.

Getting customers is about building relationships with the right people.

As we already established, transportation is all around us, so our potential customers are just as plentiful. All you need to figure out is how to identify the right shippers, get into contact with them, and start doing business with them.



STRATEGY 1: COLD CALLS

Your first option is to use the telephone. Get into contact with people and ask questions.

If you want to build a freight brokerage built around transporting steak, for example, you can start by going to Google, searching for steak companies, manufacturers, distributors. Call up the big steakhouses, find out where they get their steaks shipped from.

You can also do research about trucking companies with the truck types to match that niche. In this example, since we're looking to move steaks, you'd be researching trucking companies that have Reefers, refrigerated trailers.

A quick note about strategy, here:

With big chains, you can target one individual branch, get a great relationship going with the shipping department at that location, and then immediately have an "in" with the rest of the chain, because when you call them up, it'll be a warm introduction since you're already on their vendor list.

So go for chains, whenever possible. The whole idea of this business is to build relationships, so if you can create a good relationship with a person who's connected to a large network, that means a lot of potential business. This means if you have the choice between calling up a "mom & pop" steakhouse or an Outback Steakhouse, always call up the Outback Steakhouse first. If you can tap into that network, great!

Next step: do some research on that company.

Find out what they move, where they are, who is the shipper decision maker. The info is on the website. Look for shipping department and figure out who's in charge.

Then go find that person's Facebook, LinkedIn... learn about them. Get to know them and their interests so you can build rapport much easier.

Next step:

Call them.

Is the shipping department there? (don't tell them who you are unless asked)

I'm with AK Logistix...did I catch you at a good time?

Yes!

Great!

Once you get them on the phone, use this helpful objections guide included in the Freight Broker Manual to handle the conversation gracefully and address any objections that come up.

Objection Handling

If there are no objections and the prospect seems open to talking, use this helpful guide included in the Freight Broker Manual to go through a few questions to see how you can best help them.

Cold Call Script



STRATEGY 2: LINKEDIN

This strategy is similar to cold-calling, except instead of picking up the phone to build a relationship, you send messages to your prospect. You might call them up on the phone later on, but you're introducing yourself online.

The advantage here is that you can outsource some of this activity to a virtual assistant, if you use one. It's a little less labor-intensive for you.

Also, when you do call the prospect, they might recognize your name from your LinkedIn connection and message.

The disadvantage is that it can be harder to build a relationship online than it is if you just pick up the phone, especially if your prospect is more comfortable with the phone than with the internet.

Besides, the whole point of this strategy is to get them onto a phone call with you anyway, so you might be better off just giving them a cold call in the first place.

Regardless, if you do choose to use this strategy, you'll go to LinkedIn and search for distributors, manufacturers, etc... find the companies relevant to your niche on LinkedIn and find the decision makers for their shipping departments, the same way you would have found them if you were planning on cold-calling. You can also search for shipping managers or logistics managers using the search filters on LinkedIn.

Send a connection request with a short message that says something like this:

“Hi there, [THEIR NAME]!

[YOUR NAME] here, always looking to expand my network of logistics professionals.

Would you be open to connecting?

-[YOUR NAME]”

Then, once they accept, send them a short message that says something like this:

“Hello, [THEIR NAME]!

Thanks for accepting and connecting on LinkedIn.

After reading your bio, it seems we have a lot in common.

What may I provide YOU with years of entrepreneurial experience?

Here’s how YOU can assist Me:

Does your company require TOP LEVEL Freight Service? Yes?

Please REPLY with your Freight Lanes or Shipping Manager’s contact info.

We specialize in moving ALL shipments throughout North America

I’ll speak to you soon!

-[YOUR NAME]”

Feel free to change it up based on your niche (for example, instead of saying you specialize in ALL shipments, you can mention you specialize in flatbed trucking in Texas and surrounding states or whatever you're involved in). Once you get their contact information, you can refer to the section above when you call.

PITCHING AND CLOSING



Ask them if you can quote any shipment(s) they have for today.

Once the relationship is established, the customer will call back when they have a load. Sometimes, especially when you're first starting out working together, you'll need to call back to check if they have any loads.

Don't be afraid of follow-up. Approach it with positive energy. You're offering to help them out.

When the customer gives you a load, you'll need to ask some questions:

Where is it picking up, where is it delivering to, what is it, whether it's hazmat or needs refrigeration, how heavy is it, how wide is it, are tarps needed or not, and do you need straps or chains to secure the load... essentially, you need to understand everything you can about the load so that you can make sure you get the right driver for the job.

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FINDING DRIVERS FOR YOUR CUSTOMERS

Once you have a load from a customer, it's time to find a driver with a truck.

A Load Board is where carriers and brokers come together in the marketplace.

Brokers post things that need to be shipped, carriers can call them and say "yeah, I can move that." Vice versa, drivers can post their information, and brokers can call them up and ask them to move a load.

You can sometimes SEE how much the trucks are being paid to move something. Carriers can advertise a minimum price to charge. However, note that pricing is completely open to negotiation, and it changes every day based on a million factors. Time of year (in terms of supply and demand), location, type of load... the possibilities are endless.



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There are tons of boards, but Truckstop.com and DAT.com are two of the most popular.

You should be making a minimum of 15% of the total deal, to start.

As you gain experience, you can start making more.

LET'S REVIEW:

Carriers can do two of these things on a Load Board (and more):

- Post their truck - I'm at x location and I'll be here y time. I can go z place
- Search where loads are, and try to grab one from a broker

Brokers can also do these two things (and more):

- Search for trucks and reach out to the carrier to pick up a load
- Post the details on the loads they have available with location / destination / time in order to have carriers call them.

If the broker posts a load on a board and gets no calls, they'll need to start making outbound calls on trucks in that area, within a certain radius.

They might start within a hundred mile radius and have to move on to a two hundred mile radius... but the bottom line is that they need to find a truck for that load, one way or another.



**THAT PROCESS MIGHT LOOK A LITTLE
SOMETHING LIKE THIS:**

Broker calls up the carrier and says, “Hey, I see you have a truck for today in x location. Did you guys get that covered yet?”

“No, we need a load!”

“Great, I have a load going from x location to y location. Are you interested in that?”

“Yes, tell me more...”

“Awesome, here’s the pickup time, delivery time, details, etc...” (The broker will provide enough details for carrier to answer yes or no without giving actual names and addresses of where its picking up and/or delivering to until the broker books the truck and contract has been signed)

“How does that sound?”

“Sounds good, what’s the rate?”

“Does \$X work?” (Leave it open-ended here)

At that point, the carrier will either say yes or no. If they say yes, start the booking process.

If they say no to the rate... “Okay, do you know what rate will work and I’ll see if they can afford us? Oh, you need \$Y? Ok, I’ll tell them we’ll need \$Y to do it and make sure that will work”.

THIS IS A NEGOTIATION PROCESS.

**IT’S YOUR JOB TO JUST GET THE BEST DEAL FOR
EVERYONE INVOLVED.**

Sometimes, the carrier will just call in and ask if it's available.

At that point, the broker says, "yes, it's available. Any questions on the load?"

If the broker did their job and put all the information in the posting, the driver will probably have no questions except "yeah, what's the rate?" (unless you already put the rate in as well)

The broker then throws out a market rate, something that will make them some money, and better than what's out there available for the carrier if able... ending it with "will this work?"

Another option is if the broker is not familiar w/ the lane rate or unsure of the rate to offer carrier, the broker to ask the carrier, "What rate do you required to do this load"?

Estimating market rates is somewhat of an art, and it comes with time and experience. At the same time there are some resources out there to help with knowing the market rates for each lane.

IF THE CARRIER SAYS YES, THEN GREAT.

The broker then needs to go into basic questions to make sure they're equipped to handle the load: getting their MC # / DOT #, firstname / lastname of dispatcher + driver, callback #, driver's # , email, trailer type, trailer #, truck #, tarps / chains / binders / any other tiedowns, reconfirm that pickup/delivery times can be met, ETA on driver arriving to the pickup, etc.

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If the broker has never worked with that carrier, they need to exchange a broker / carrier contract, also called a carrier packet. That needs to be signed by the carrier (driver) or dispatcher working on behalf of the carrier and returned to the broker.

Once the relationship has been established, they can continue working together without signing an all-new packet, unless it expires and needs to be renewed, or if either party's company changes contracts or policies, etc.

Also, the broker needs to provide the rate confirmation: a document with the load #, all the details, what the carrier will be paid, etc. The driver signs it and returns it to the broker.

Unlike the broker / carrier contract, the rate confirmation has to happen every single time there is a new move.

Once the move starts, stay in contact with the carrier (and the shipper for any updates).

Make sure they receive the load at the final destination, and make sure everything went smoothly for the carrier.

If anything goes wrong during the move, (like a delay), make sure you're in contact with both the shipper and the carrier. Your job is to make sure that everyone has as good an experience as possible with this deal.

Remember what I said earlier on in the course... if the movement of a load goes perfectly, that's a pleasant surprise.

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When faced with stressful situations, always remember to remain calm. In the event of challenges, you must be calm and solution focused. This is part of your job and the value you bring so don't get caught up in others drama and problems. Stay positive. It's all going to work out in the end.

STANDING OUT FOR THE LONG TERM

First of all, be consistent. Follow up a lot. Follow up so much that they get tired of hearing from you and give you your shot.

Take an ongoing interest in potential clients even when they're not interested in you. Stay interested in them!

The simple fact is that in trucking, there's a lot of challenges, so your potential customers are constantly looking for great, skilled logistics partners. You just need to be there to provide them the solution when your opportunity comes. There is constant opportunity no matter what/who the company is, no matter what your niche.

This business is ultimately about relationships with both shippers and carriers.

Stick in people's minds as a positive and helpful person always ready with a solution, and eventually they'll start coming to you with business.

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It helps to have a clean, professional web presence as well.

You don't need to invest in a fancy website right off the bat, but you should have a simple website, a professional picture on your Facebook profile with all non-professional posts set as only visible to friends, and a LinkedIn presence that's polished and free of typos.

One important thing is to make sure you have a high-quality picture of yourself smiling at the camera on both Facebook and LinkedIn, as well as any other profiles you are using for your brokerage.

When you're making connections with people, first impressions matter. When you make that first cold-call, they'll probably look your name up online after you hang up.

Make sure what they find online is going to present you in your best light.



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Since you won't be meeting your customers in person for the most part, it can be helpful for them to put a face to your name. It will help them remember who you are. An easy way to do this is to put a picture of yourself in your email signature.

This seems like a minor detail, but it can really help you stand out.

Most importantly, in every single interaction with a client or a potential client, remain calm, positive, and polite. Even if someone is speaking (or typing) in a less-than-respectful way to you, always take the high road. Integrity and patience will never go out of style.

And this doesn't mean you have to talk like a Sunday School teacher when you're trying to build rapport on your calls. Just make sure you're staying positive overall. Don't beat yourself up if you ever lose your cool, but that should be the exception and not the rule.

Over time, you'll stand out. Your reputation will spread, and both shippers and carriers will realize you're a good person to work with: friendly, honest, and ethical. That will get you even more business as time goes on.

**CONGRATULATIONS! IF YOU'VE READ THIS FAR
AND FOLLOWED ALL THE STEPS, YOU ARE MOST
LIKELY WELL ON YOUR WAY TO A 7 FIGURE
BROKERAGE, JUST LIKE MINE!**