

Freight Business Plan Template

A guided planning document for launching a freight brokerage, dispatch service, or related logistics business.

This template is for planning and educational use. Licensing, insurance, tax, and legal requirements vary. Verify current requirements with the appropriate agencies and qualified professionals.

1. Executive Summary

Business name and location: _____

Business model: brokerage, dispatch, consulting, or combination:

Primary services: _____

Target customers: _____

Competitive advantage: _____

First-year goals: _____

Notes:

2. Company Description

Mission statement: _____

Vision statement: _____

Ownership structure: _____

Business formation status: _____

Service territory: _____

Why the business is needed: _____

Notes:

3. Market Analysis

Ideal customer profile: _____

Industries or commodities served:

Geographic lanes or markets:

Competitor strengths and weaknesses:

Market opportunity: _____

Customer pain points: _____

Notes:

4. Services & Pricing

List each service: _____

Explain how each service works:

Pricing method or fee structure:

What is included and excluded:

Payment terms: _____

Service standards: _____

Notes:

5. Marketing & Sales Plan

Website strategy: _____

Email and phone outreach: _____

Networking and referral plan:

Social media or content plan:

Lead tracking process: _____

Monthly sales goals: _____

Notes:

6. Operations Plan

Daily workflow: _____

Technology and software: _____

Carrier or client onboarding: _____

Document management: _____

Communication standards: _____

Issue escalation and after-hours plan:

Notes:

7. Compliance & Risk Management

Required registrations and licenses:

Contracts and service agreements:

Insurance needs: _____

Data protection and record retention:

Carrier/customer verification:

Contingency planning: _____

Notes:

8. Management & Staffing

Owner responsibilities: _____

Future roles: _____

Contractor or employee plan:

Training standards: _____

Performance measures: _____

Notes:

9. Financial Plan

Startup expenses: _____

Monthly fixed expenses: _____

Variable expenses: _____

Revenue assumptions: _____

Break-even estimate: _____

Cash reserve goal: _____

Notes:

10. Milestones

30-day launch milestone: _____

90-day business milestone: _____

Six-month milestone: _____

One-year milestone: _____

Notes:

Startup Budget Worksheet

Expense	Estimated	Actual	Notes
Business formation	\$ _____	\$ _____	
Licensing/registrations	\$ _____	\$ _____	
Insurance/bonding	\$ _____	\$ _____	
Website/domain	\$ _____	\$ _____	
Software/TMS/load board	\$ _____	\$ _____	
Marketing	\$ _____	\$ _____	
Office equipment	\$ _____	\$ _____	
Professional services	\$ _____	\$ _____	
Operating reserve	\$ _____	\$ _____	
Other	\$ _____	\$ _____	

Revenue Projection

Month	Customers/Loads	Average Revenue	Estimated Expenses	Estimated Profit
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				