

Freight Dispatcher Startup Checklist

A practical checklist for launching an independent dispatch service for motor carriers.

A dispatcher generally works as an authorized agent of a motor carrier. Structure services carefully and obtain legal guidance so the business does not improperly operate as an unlicensed broker.

Training is always first. Never attempt to start a dispatcher business before you are trained.

Business Setup

- ☐ Choose a business name and entity structure.
- ☐ Obtain an EIN and business bank account.
- ☐ Set up business email, phone, website, and payment method.
- ☐ Define services, pricing, and refund/cancellation terms.
- ☐ Prepare a startup budget.

Agreements & Legal Boundaries

- ☐ Use a written dispatch service agreement.
- ☐ Include a limited power of attorney or agency authorization when appropriate.
- ☐ Clearly identify the motor carrier as the transportation provider.
- ☐ Avoid representing freight as your own or allocating loads among carriers.
- ☐ Obtain legal review of agreements and business practices.

Tools & Systems

- ☐ Secure reliable computer, phone, headset, and internet access.
- ☐ Select load boards and carrier-approved technology.
- ☐ Create a carrier profile and document checklist.
- ☐ Set up calendars, reminders, and load-tracking sheets.
- ☐ Create invoice and payment tracking.

Carrier Onboarding

- ☐ Verify carrier authority and insurance.
- ☐ Collect W-9, authority letter, insurance certificate, and contact details.
- ☐ Review equipment type, preferred lanes, home time, minimum rate, and restrictions.
- ☐ Confirm who may approve rates and sign confirmations.
- ☐ Document communication and check-call expectations.

Daily Dispatch Workflow

- ☐ Review driver availability and hours.
- ☐ Search for suitable loads based on carrier instructions.
- ☐ Verify broker identity and load details.
- ☐ Present load options to the carrier for approval.
- ☐ Negotiate only within the carrier's authorized parameters.
- ☐ Send confirmations and load documents promptly.
- ☐ Track pickup, transit, delivery, and paperwork.
- ☐ Submit completed documents and maintain records.

Client Acquisition

- ☐ Define ideal carrier type and fleet size.
- ☐ Create carrier outreach script and service presentation.
- ☐ Set weekly prospecting and follow-up targets.
- ☐ Use a consultation form to assess fit.
- ☐ Request testimonials or referrals after proven service.

Risk Controls

- ☐ Watch for fraudulent emails, altered rate confirmations, identity mismatches, and payment scams.
- ☐ Never use a carrier's credentials without authorization.
- ☐ Protect passwords and sensitive documents.
- ☐ Maintain written records of approvals and changes.
- ☐ Create an emergency and after-hours procedure.

Carrier Intake Snapshot

Carrier legal name: _____

MC/USDOT: _____

Equipment: _____

Preferred lanes: _____

Minimum rate or RPM: _____

Home time requirements: _____

Driver contacts: _____

Factoring company: _____

Special restrictions: _____