



FREIGHT BROKERAGE

SELECTION CHECKLIST



THIS CHECKLIST

is your true north, your go-to tool, whether you're selecting a freight brokerage for the first time, or looking to expand your list of trusted partners.

THERE ARE **5** FACTORS

that impact a freight brokerage's ability to adequately serve your unique needs. Make sure they have what it takes to assist your supply chain by vetting their:

1 Core Strengths

2 Carrier Vetting Process

3 Technology Usage & Load Tracking Capabilities

4 Track Record & Reliability History

5 Financial Health & Overhead Considerations



How to use this checklist:

Use the rating scale to the right of each question to assess the level of confidence you have in the brokerage regarding each of these questions/categories.

1 = Not at all confident they're a good fit **5** = Exactly what you're looking for

Make sure to use the short notes section under each question to record notes during discussions and your initial reactions for future reference.

Core Strengths Questions

Use these to make sure their areas of proficiency match your needs.

Rate Their Response

How comfortable are you in their response and/or capabilities here?

- | | | | | | |
|---|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| <input type="radio"/> What are your company's core strengths? <i>Notes:</i> | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 |
| <input type="radio"/> What type of commodities do you move most frequently? <i>Notes:</i> | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 |
| <input type="radio"/> What are you <u>not</u> good at moving? <i>Notes:</i> | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 |
| <input type="radio"/> What are your preferred lanes, regions and distances? <i>Notes:</i> | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 |
| <input type="radio"/> What is the average length of your customer relationships? <i>Notes:</i> | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 |

Carrier Vetting Questions

The quality, safety and reliability of your brokerage's carrier network matter. Ask these questions to ensure they have the same priorities as you and can provide the quality delivery experience you need.

Rate Their Response

How comfortable are you in their response and/or capabilities here?

- | | | | | | |
|---|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| <input type="radio"/> How many carrier partners do you have? <i>Notes:</i> | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 |
| <input type="radio"/> What is your carrier vetting process? <i>Notes:</i> | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 |
| <input type="radio"/> How long is your oldest carrier relationship? <i>Notes:</i> | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 |
| <input type="radio"/> How often are you adding new carriers to your network? <i>Notes:</i> | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 |

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Safety Related Questions

Safety is a key component of finding success in this industry. Make sure your brokerage has these values.

Rate Their Response

How comfortable are you in their response and/or capabilities here?

- How do CSA ratings play into your carrier selection process?
Notes: 1 2 3 4 5
- How do you make sure the safest carrier is on my load?
Notes: 1 2 3 4 5

Technology Infrastructure & Load Tracking Capability Questions

What kind of visibility and tracking needs do you have for each load? Can this company meet them? Ask these questions to find out.

Rate Their Response

How comfortable are you in their response and/or capabilities here?

- What load tracking technologies do you utilize and what are their features?
Notes: 1 2 3 4 5
- What technologies do you use to give you real-time transportation market insights?
Notes: 1 2 3 4 5
- What is your process for keeping your customer and tracking technologies up to date?
Notes: 1 2 3 4 5
- Do you offer a customer portal?
Notes: 1 2 3 4 5

Performance & Reliability Considerations

Use this set of questions to make sure they're dependable and can be counted on consistently.

Rate Their Response

How comfortable are you in their response and/or capabilities here?

- What is your on-time delivery rate?
Notes: 1 2 3 4 5
- What is your experience moving my type of commodity?
Notes: 1 2 3 4 5
- How do you make sure shipments deliver on time?
Notes: 1 2 3 4 5
- What is your process/protocol when something goes wrong?
Notes: 1 2 3 4 5



Stability, Operations & Overhead Considerations

Find out if this brokerage has the financial stability and infrastructure you need to succeed.

Rate Their Response

How comfortable are you in their response and/or capabilities here?

How long has your company been in operation?

Notes:

1 2 3 4 5

How many locations do you have?

Notes:

1 2 3 4 5

How long have you been with the company?

Notes:

1 2 3 4 5

How do you price your customer's shipments?

Notes:

1 2 3 4 5

What happens after I book a load?

Describe your booking process.

Notes:

1 2 3 4 5

What services besides trucking do you offer?

ie: warehousing, permitting, drayage etc.

Notes:

1 2 3 4 5

What is your service commitment to your shippers & carriers?

Notes:

1 2 3 4 5

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(Total up their complete score here)

Grand Total:

_____/130

How'd they stack up?

130-117

Best Match
Worth giving a try

114-98

Possible Fit
Ask for references

97-77

Questionable
Use as last resort

76-0

Probably Not
Best to pass on this one

Circumstances vary. Scores should only be used as a general guide to help you discern how well an individual brokerage aligns with your needs.

