



## Rate Con Ready — Expanded Study Guide

### The Pre-Booking Checklist That Protects Your Company

This study guide is built to do two things for you:

1. Make sure you fully understand the discipline behind signing a rate confirmation.
2. Give you repeatable ways to practice until this becomes automatic—so you stop booking problems and start booking clean, profitable freight.

## The One Rule That Runs Everything

**A rate confirmation is a commitment.**

When you sign it, you are saying: “We are picking up. We are delivering. No excuses.”

**Professional standard:**

You do not sign and then “figure it out later.”

You figure it out first... then you sign.

**Why this matters**

- Backing out hours after signing damages your name.
- Your name is your credit in trucking.
- A carrier who looks unreliable gets quietly removed from future opportunities.

**Self-check:**

If you are not one hundred percent sure you can execute... **you are not Rate Con Ready.**

## The Rate Con Ready Checklist (Study + Real-World Use)

### Gate 1 — Broker Verification

**Purpose:** Protect your money and your time.

**What you verify**

- Is this a new broker to you? If yes, you go into verification mode.

- Company identity and legitimacy
- Payment terms (standard pay, quick pay, fees)
- How documents are submitted (email/portal/factoring)

## **Red flag you must memorize**

**Original paperwork required** (original B-O-L, mailed originals) is a major warning sign. It slows funding, creates missing-document leverage, and scammers use it.

## **Student drill**

Write your “new broker script” and practice it out loud:

- “What are your payment terms?”
- “Do you accept digital documents?”
- “What paperwork do you require to invoice?”
- “Who handles detention approval and how is it documented?”

## **Improve your skill:**

Build a one-page “Broker Profile Sheet” you fill out every time you work with someone new.

# **Gate 2 — Load Reality Check**

**Purpose:** Remove surprises before they become delays.

## **Confirm these before rate talks**

- Pickup type: appointment vs first-come-first-serve
- Delivery type: appointment vs open window
- Live load/live unload/drop and hook
- Commodity, weight, trailer requirements
- Any special rules: driver assist, seals, pallet exchange, PPE

## **Paperwork clarity (this protects pay)**

- How many documents total?
- How many stops?
- How many signatures required?
- Any special photo requirements?

## **Improve your skill:**

Make a “Load Facts Template” in your phone notes so you never forget a question.

## **Gate 3 — Money Math Discipline**

**Purpose:** Stop taking loads that steal days.

### **The standard from the session**

**You need one thousand dollars plus per day.**

That means you calculate by days consumed, not just total rate.

### **What to include in time math**

- Pickup day reality
- Delivery day reality
- Deadhead to pickup
- Facility delay probability
- Traffic/weather risk

### **Improve your skill:**

Start a “Time Cost Journal.” After each load, write:

- Expected days vs actual days
- What caused delay
- What you would demand next time for that risk

That’s how you become a pricing professional.

## **Gate 4 — Accessorial Discipline (Detention + Lumpers + Hidden Costs)**

**Purpose:** Don’t donate time or money.

### **Your must-ask questions**

- Are there lumper fees? Who pays? How do you get reimbursed?
- Is detention common at this shipper or receiver?
- When does detention start? What’s the hourly rate?
- What documentation is required to get it approved?

**Key principle**

If it's not clearly agreed to... you don't assume it will be paid.

**Improve your skill:**

Create a "Facility Notes" list for shippers/receivers:

- average wait time
- how they check in
- what time they actually start unloading
- whether detention is realistic to collect

This becomes your private advantage over time.

## **Gate 5 — Hours of Service Reality Check**

**Purpose:** Never sign a load that requires violations.

**Confirm before signing**

- Driver hours available now
- Recaps and reset timing
- Can you legally make pickup on time?
- Can you legally deliver on time?

**Reality check**

If the plan requires speeding, skipping breaks, or "pushing it"... that load is already broken.

**Improve your skill:**

Have your driver send a standard "Clock Status Update" before every booking:

- drive hours remaining
- on-duty remaining
- next reset timing
- any appointment constraints

## **Gate 6 — Equipment & Maintenance Readiness**

**Purpose:** Don't sign loads your truck can't finish.

**Confirm**

- Any warning lights, derates, leaks, tire issues
- Maintenance due during the trip window
- Reefer needs (if applicable): temp control, reefer fuel, continuous mode

**Improve your skill:**

Create a 3-minute pre-book “mechanical truth” call:

- “Anything wrong today?”
- “Any lights?”
- “Any air loss?”
- “Any tire concerns?”
- “Any maintenance due before delivery?”

You’re not being paranoid—you’re being professional.

## Gate 7 — Compliance Readiness

**Purpose:** Movement without interruption.

**Confirm**

- I-R-P cab card current
- Insurance cab card current
- Annual inspection current
- Driver docs current
- No known issues that increase inspection risk

**Improve your skill:**

Build a “Compliance Ready” folder on the driver’s phone with photos of all documents—plus physical copies in the truck.

## Gate 8 — Communication System

**Purpose:** Prevent failures caused by silence.

**Confirm**

- Who tracks the load?
- Who talks to the broker?
- How are delays reported immediately?
- What’s the escalation plan?

**Improve your skill:**

Write your standard communication cadence:

- pickup confirmed
- loaded confirmed
- departure confirmed
- mid-route ETA update
- check-in at receiver
- empty call with paperwork

Professional carriers don't "wing communication."

## Gate 9 — Lane Strategy Thinking

**Purpose:** Build lanes, not random moves.

**The owner mindset**

- Who is the shipper? Who is the receiver?
- Is this lane repeatable?
- Does this broker have volume?
- Could you run multiple trucks here later?
- Is there freight coming out on the backhaul?

**Improve your skill:**

Start building a "Lane Board" list:

- lanes you like
- what rate per mile you need
- what the facilities are like
- who controls the freight (broker, shipper, receiver)

This is how one truck becomes a system.

## Gate 10 — Rate Con Review (The Final Gate)

**Purpose:** Make sure what you signed is what you thought you booked.

**Verify every time**

- correct pickup and delivery addresses

- correct appointment times and dates
- correct equipment, commodity, weight
- correct stop count and order
- detention terms written
- lumper terms written
- billing instructions clear and digital
- rate and pay terms correct

**The rule**

**If it's not written, it doesn't exist.**

**Improve your skill:**

Create a “Rate Con Review Checklist” and require a second set of eyes if you have staff—especially on new broker loads.

## **Skill-Building Assignments (How You Improve Fast)**

### **Assignment 1 — One Load Simulation (repeat weekly)**

Pull one real load from a load board and fill out this worksheet:

- Broker verification questions
  - Load facts questions
  - One-thousand-plus per day math
  - Accessorial risk plan
  - HOS feasibility check
  - Rate con review checklist
- Final decision: **sign or decline** with a two-sentence explanation.

### **Assignment 2 — Create Your “Decline Script”**

Most beginners don't decline professionally. Build your script:

- “I can't make the appointments legally with current hours.”
- “The paperwork process doesn't match our billing standards.”
- “The rate doesn't match the time and facility risk.”
- “We can revisit if terms change.”

### **Assignment 3 — Build Your Company Playbook**

Create a simple playbook with:

- Broker verification standards
- Minimum rate per day standard
- Detention and lumper requirements
- Communication cadence
- Rate con review rules

That's how you turn knowledge into a system.

## Mastery Self-Test (Answer Out Loud)

1. What does signing a rate con commit you to?
2. What's the biggest danger of "original paperwork required"?
3. Why is per-day math more important than total rate?
4. What must be true for detention to get paid?
5. What HOS reality makes a load a "no"?
6. What mechanical risk is an automatic decline for you?
7. What documents must be current before you roll?
8. What's your communication cadence on every load?
9. What makes a lane repeatable and scalable?
10. What are the top five things you verify on the rate con?

If you can answer those clean without thinking... you're building Rate Con Ready discipline.

## The Standard You're Training Toward

A professional carrier doesn't get paid because they "book loads."  
They get paid because they **execute commitments cleanly**.

Rate Con Ready is not paperwork.  
It's not a checklist.

It's a business discipline that protects your company name while you grow.