



Freight University

Phase 3 — Transportation Systems, Freight Classification, and the Industry → Equipment Cycle

Updated Student Follow-Along Study Guide

HOW TO USE THIS GUIDE

This is a thinking guide, not a worksheet.

Use it while listening to the Phase 3 teaching.
Pause the audio often. Write. Research. Make decisions.

Phase 3 is not about memorizing definitions.
Phase 3 is about building alignment.

Research leads you to the right industry.
The right industry leads you to the right equipment.
The right equipment leads you to the right carrier and driver profile.
The right carrier profile leads you to consistent shipper execution.
Then you scale the cycle.

If you rush this phase, you will build a trucking operation that hunts... instead of a company that controls.

PHASE 3 PURPOSE

Phase 2 taught you the deal and the structure.
Phase 3 teaches you the physical reality of freight.

This phase gives you a transportation department mindset.
You stop thinking like a truck.
You start thinking like transportation.

Then you add the Phase 3 upgrade.
You stop choosing equipment first.
You choose industry first.

Industry decides freight.
Freight decides handling.

Handling decides trailer.
Trailer decides driver profile.
Driver profile decides carrier partners.
Carrier partners decide shipper performance.
Performance creates consistency.

Consistency keeps a trucking company alive.

PHASE 3 OUTCOMES

By the end of Phase 3 you should be able to:

1. Explain transportation as a system of modes, nodes, and constraints.
 2. Choose the correct mode for a shipment and defend the decision.
 3. Identify what really changes cost: touches, time, accessorials, and paperwork.
 4. Class freight using the four drivers and avoid reweigh and reclass penalties.
 5. Read a Bill of Lading as a legal contract and a payment trigger.
 6. Choose one local industry and match it to equipment.
 7. Match that equipment to the right type of carrier and driver profile.
 8. Build a repeatable industry lane plan that prepares you for Phase 4 workflow execution.
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THE PHASE 3 CORE MODEL

The Transportation Lens

Transportation is a system.

A system has:

- Modes — how freight moves
- Nodes — where freight stops
- Constraints — what forces decisions

The Triangle

Every shipment lives inside this triangle:

- Speed
- Cost
- Handling

If you want speed, you pay.
If you want low cost, you accept time and complexity.
If you want protection, you reduce handling and control touches.

The Development Cycle

This is the Phase 3 growth cycle you will run for the rest of your career:

Research → Industry → Equipment → Carrier and Driver Profile → Shipper and Receiver Relationships → Consistency → Scale → Repeat

SECTION 1 — MODES, NODES, CONSTRAINTS

Listening Focus

- Why freight moves through networks, not straight lines
- Where money hides inside the system
- Why waiting is a cost driver

Pause and Write

1. List five nodes near you.
Examples: distribution center, cross-dock, port, rail ramp, terminal, major warehouse.
2. List five constraints you have personally felt.
Examples: appointment windows, dwell, equipment shortage, weather, traffic, facility rules.

Action

Build a one-page “Local Freight Map.”

- Your city or region
 - Three main freight corridors
 - Ten facilities you can name
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SECTION 2 — MODE FLUENCY

Listening Focus

- Truckload versus less-than-truckload versus intermodal
- Why each mode exists
- What each mode punishes

Mode Snapshot

Truckload

- Fewer touches
- Appointment discipline matters
- Time risk is the silent cost

Less-than-truckload

- Terminal network
- More touches
- Classification and packaging control the bill

Intermodal

- System move
- Handoff risk
- Schedule variability

Ocean and Ports

- Bottlenecks
- Time-based charges
- Precision required

Air

- Urgency and value
- Time is the product

Pause and Write

Choose one industry you see near you.

Answer:

- Which mode dominates this industry
- Why that mode makes sense

Action

Create a “Mode Decision Note” you can reuse.

Write one paragraph for each:

- When this industry uses truckload
 - When this industry uses less-than-truckload
 - When this industry can use intermodal
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SECTION 3 — INDUSTRY FIRST, EQUIPMENT SECOND

Listening Focus

- Why equipment-first thinking breaks trucking companies
- Why industry-first thinking creates consistency
- Why local industry selection accelerates learning

The Rule

Industry dictates equipment.

Equipment dictates driver profile.

Driver profile dictates carrier partners.

Carrier partners dictate shipper consistency.

Pause and Write

1. List ten industries within a reasonable drive of you.
2. Circle three industries you can realistically learn fast.
3. Put a star next to the industry that has repeatable freight.

Action — Choose One Industry

Pick one industry for the next sixty days.

Write:

- Why it exists in your area
- What it ships
- How it ships
- What seasonality looks like

SECTION 4 — FREIGHT CLASSIFICATION

Listening Focus

- Classification is risk pricing
- Why less-than-truckload makes class non-negotiable
- Why misclass destroys trust

The Four Drivers

- Density
- Stowability
- Handling
- Liability

The No-Guess Rule

If you do not know:

- weight
- dimensions
- packaging
- stackability

You are not quoting.

You are gambling.

Practice Exercise

Pick five commodities from your chosen industry.

For each, write:

- commodity in plain language
- packaging type
- piece count
- weight
- dimensions
- stackable yes or no

- your proposed class
Then write one sentence for each of the four drivers.
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SECTION 5 — PACKAGING AND TOUCH COUNT

Listening Focus

- A pallet is a handling contract
- Touch count increases claims risk
- Packaging can lie

Pause and Write

Write your “Packaging Questions” script.
Use this exact flow:

- What is it
- How is it packaged
- How many pieces
- Is it palletized
- Is it wrapped or banded
- Is it stackable
- Total weight and dimensions
- Any special handling

Action

Create a photo library on your phone.

- examples of good pallets
 - examples of bad pallets
When you see freight in real life, document it.
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SECTION 6 — ACCESSORIALS AND HIDDEN MARGIN LOSS

Listening Focus

- Accessorials appear when reality differs from the quote
- If you cannot prove it, you may not collect it

Common Accessorial Categories

- Location-based: residential, limited access
- Service-based: liftgate, inside delivery
- Time-based: detention, layover
- Failure-based: redelivery, truck ordered not used

Pause and Write

Create your “Accessorial Trap List” for your chosen industry.

List ten accessorials.

For each, write:

- how it happens
- how you verify it upfront
- what proof you would collect

SECTION 7 — INTERSTATE VERSUS INTRASTATE POSTURE

Listening Focus

- Do not play lawyer
- Operate like auditable
- Compliance is revenue protection

Pause and Write

Write one paragraph:

“How I will operate as if auditable.”

Action

Write a short checklist:

- what you verify before tendering a carrier
 - what you verify before tendering a load
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SECTION 8 — FREIGHT TERMS OF SALE AND RESPONSIBILITY

Listening Focus

- Who controls the move
- Who pays
- Who gets blamed

Pause and Write

Answer:

- When a shipment fails, who gets the angry phone call
- What questions prevent that failure

Action

Create a “Responsibility Clarifier” list.

Use it when speaking with shippers.

- Who schedules pickup
 - Who schedules delivery
 - Who is the billing party
 - Who approves accessorials
-

SECTION 9 — BILL OF LADING MASTERY

Listening Focus

- Bill of Lading is the legal spine
- It is proof

- It protects claims and payment

Three Habits

1. Verify shipper, consignee, references
2. Verify piece count, packaging description, weight
3. Note exceptions immediately

Practice Exercise

Create a one-page “BOL Audit Checklist.”

Use it at pickup and delivery.

Include:

- names and addresses
- reference numbers
- commodity description
- class where applicable
- piece count
- seal number if applicable
- exception notes
- signature and timestamp discipline

SECTION 10 — THREE APPLIED CASES

Use this case structure every time:

- Shipment profile
- Mode choice and why
- Top five questions to ask
- Top three failure points
- Minimum proof required
- What changes the bill

Case A — Clean Truckload

Dock-to-dock, standard freight.

Case B — Less-than-truckload with class risk

One pallet, “easy.”

Case C — Port or intermodal influenced move

Appointments, handoffs, time-based charges.

PHASE 3 DELIVERABLES

If you complete these, you are ready for Phase 4.

Deliverable 1 — Local Industry Map

- Ten industries near you
- Two shipper examples per industry
- One receiver example per industry

Deliverable 2 — Industry to Equipment Match Sheet

- Your selected industry
- Freight types
- Trailer type
- Common shipment profile
- Common constraints

Deliverable 3 — Mode Decision Sheet

- When truckload is used
- When less-than-truckload is used
- Whether intermodal is relevant
- Whether ports are relevant

Deliverable 4 — Freight Classification Practice Pack

- Five commodities
- Four drivers written for each

Deliverable 5 — Bill of Lading Audit Checklist

- Pickup and delivery checklist

Deliverable 6 — Accessorial Risk List

- Ten accessorials with proof requirements

Deliverable 7 — Phase 4 Bridge Page

Two lists:

- Movement Stream: what events must occur
 - Proof Stream: what documents must exist
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TWO-WEEK STUDY PLAN

Week 1 — System Understanding and Industry Selection

- Day 1: Build Local Freight Map and list nodes and constraints
- Day 2: Truckload versus less-than-truckload comparison notes
- Day 3: Choose one industry for sixty days and write your why
- Day 4: Draft Industry to Equipment Match Sheet
- Day 5: Start Classification Practice Pack with two commodities

Week 2 — Proof, Risk, and Phase 4 Bridge

- Day 6: Finish all five commodities in your classification pack
- Day 7: Build Bill of Lading Audit Checklist
- Day 8: Build Accessorial Risk List for your industry
- Day 9: Add port and urban constraints if relevant
- Day 10: Write your auditable posture paragraph
- Day 11: Write responsibility clarifiers and shipper questions
- Day 12: Build Movement Stream and Proof Stream
- Day 13: Assemble all deliverables into one folder
- Day 14: Record yourself explaining your strategy in five minutes

If you cannot explain it, you do not own it.

QUICK TOOLS — COPY AND USE

Tool 1 — Shipment Intake Questions

- What is the commodity in plain language

- How is it packaged
- Piece count and pallet count
- Dimensions and total weight
- Stackable yes or no
- Special handling, temperature, securement
- Pickup window and delivery appointment
- Dock and forklift availability
- Any known accessories

Tool 2 — Mode Decision Prompt

“Given this freight, what mode fits the speed, cost, handling triangle best, and why.”

Tool 3 — Accessorial Proof Rule

“If it is not verified, approved, and documented, it may not be collectible.”

Tool 4 — Bill of Lading Habit

“Verify. Describe. Note exceptions.”

WORK INSIDE THE PORTAL

Use the Consultant A I inside Freight University.
Ask questions until your answers are sharp.

Suggested prompts to ask the Consultant A I:

- “Help me choose one local industry that fits repeatable freight.”
- “What trailer type is most common in this industry and why.”
- “Give me a shipment intake question script for this industry.”
- “Walk me through class logic for this commodity.”
- “What accessories are most common for this industry and how do I document them.”
- “Give me a Phase 4 readiness checklist based on my industry and equipment choice.”

PHASE 4 PREVIEW

Phase 4 turns Phase 3 understanding into execution.

You will learn:

- The complete workflow of your first load
- Carrier onboarding and qualification
- Shipper onboarding
- Rate confirmations and agreements
- Check call discipline
- Hours of service awareness
- Documentation closeout

Phase 3 is alignment.

Phase 4 is execution.

When you are ready... move forward.