

Why Your Trucking & Hotshot Business Sucks

You're hauling the loads, chasing the money
and handling everything else.
Why is there still so little left?



THS

TRUCKING & HOTSHOT SERVICES, LLC
STRUCTURE • COMPLIANCE • GROWTH

TRUCKING & HOTSHOT
SERVICES, LLC

FIRST READER EDITION



Why Your Trucking & Hotshot Business Sucks

Trucking & Hotshot Services, LLC

A practical book for the first purchase, the next load and the business behind both.

Expanded first reader edition

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Digital launch manuscript

Complimentary digital edition. No call or purchase is required to read this book.

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The cover is an AI-generated illustration, not a photograph of a THS-owned fleet. Mara, Drew, Rae and Niko are fictional teaching characters. Examples use assumed figures, not reported client results or market averages.

THS is a private transportation consulting, business-development and administrative-services provider. It is not a motor carrier, insurer or government agency. This book is education and planning guidance; individual regulatory, legal, insurance and tax questions require the relevant official or qualified professional.



A note from THS

For the owner trying to build a business that works as hard as they do.

Welcome. If you are deciding whether to buy your first truck, these pages can help you examine the business before the payment becomes real. If you already operate, they can help you find the unfinished work hiding between a good-looking load and money you can actually keep.

A truck brings freedom and responsibility in the same purchase. There is equipment to choose, freight to evaluate, money to collect and a growing list of people whose work has to fit together. This book is an invitation to put the business behind those decisions on paper.

You do not need to read it from beginning to end tonight. Start with the chapter nearest the decision costing you money or sleep. Read with a pencil and your own records nearby. Question the assumptions, write down what is missing and use the worksheets to make your next conversation more useful.

Some answers will mean doing the work yourself. Others will mean asking an official source or choosing qualified help. Either can be a good result when you understand what needs to happen and who owns it.

We hope these pages help you make a clearer decision and leave more room in the day for the reasons you started.

With best wishes,
The THS Team
Trucking & Hotshot Services, LLC



How to use this book

The chapters connect equipment, freight, documents and cash. Choose the reading path that matches your stage, then complete one worksheet. Assumptions are teaching inputs; replace them with your quotes, contracts and actual records.

Your decision	Start here
Before buying or starting	Chapters 1, 5, 9, 13, 16 and 17; startup cash and carrier-readiness sheets.
Running a truck but keeping too little	Chapters 2–4, 7–9 and 16; whole-trip, diesel and monthly-close sheets.
Specialized freight or fleet growth	Chapters 6, 10, 11, 15 and 18; specialized-load and onboarding sheets.
Choosing the next repair	Chapters 12, 14 and 19; seven-day action and weekly cash sheets.

Bracketed notes lead to the source register. Worksheets organize a decision; they do not authorize movement or certify compliance. Use current official records and qualified review where needed.

Avery is our THS Carrier Advisor team. Your response or confirmation names the real representative assigned.

Hop on a quick call. Complimentary 15-minute Carrier Fit Call.

Call 800-884-8520

Email admin@truckingandhotshotservices.com



Bring the unfinished work to THS

Starting or repairing a carrier business? Ask about Motor Carrier Setup & Business Development. Choosing dispatch help? Bring your equipment, intended freight and the work you need handled. Billing or bookkeeping stalled? Describe the missing handoff. We will identify the appropriate service or official route; paid work requires its own written scope.

Tell THS what you need handled

Share your name, business and preferred reply details in the inquiry. Do not send passwords, security codes, banking details or sensitive carrier documents through a general form or ordinary email. A conversation does not authorize a filing or start dispatch.



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Prologue

The truck is parked. The work is still running. There is a delivery receipt to send, a fuel charge to identify, a broker to follow up with and a message saying something in your carrier paperwork is overdue. You can spend the whole evening working and still have no clear answer to the question that matters: what did this week actually leave you?

If you have not bought the truck yet, your version may look better from the outside. The equipment listing is open. Someone has shown you a load-board screenshot. The payment seems manageable. You can already picture the business name on the door. What you cannot see in the picture is the cash you will need between accepting the work and collecting the money.

This book is for both of you. It is also for the owner adding a second truck who has discovered that a second driver brings a second stream of phone calls, records, decisions and bills. The problems change shape as the business grows. They still arrive at the owner's desk.

The title is blunt because the question is blunt. A business can feel terrible even when its owner works hard, its drivers care and its trucks look good. Too little money stays behind. Too much depends on one person remembering everything. Another purchase begins to feel like the only way out.

Imagine four desks in the same industry. Mara has a truck listing open and a down payment ready. Drew delivered two loads and cannot say what the week left. Rae is weighing a specialized movement that pays well if the route can be performed. Niko has enough trucks that his phone is now the



dispatch system. They are fictional, but the decisions are familiar. They will return in the chapters because a business problem rarely stays politely in one category.

Start with the decisions you can examine. What freight are you equipped and authorized to carry? Which customers will accept your carrier today? What will the whole trip cost? Who will assemble a payable invoice? Who will reconcile the settlement? What happens when the truck breaks down or the owner cannot answer the phone?

You do not need to master every profession involved in trucking. You need enough understanding to choose qualified help, define the work and recognize whether it was delivered. A dispatcher should be able to explain a load decision. A bookkeeper should be able to show the records behind a report. A service provider should be able to tell you what they will do, what they will not do and what remains your responsibility.

Read the chapter nearest your next expensive decision. Then write down the answer. A number you can test and a responsibility someone has accepted are more useful than another promise. The worksheets at the end give you a place to begin.



01 Before you buy the truck

A truck payment is easy to find. A complete cost of entering the business takes more work. Before you choose equipment, describe the freight you intend to carry, the places you intend to operate and the people who might actually buy that service. The equipment should follow that description. Buying first can leave you trying to make a freight plan fit a truck that was available at a good price.

Write two separate budgets. The first covers getting ready: equipment cash due, registration and professional help where needed, an insurance quote for the intended operation, inspections, initial repairs, securement equipment and systems. The second covers keeping the business alive while money is moving slowly: fuel, recurring bills, living needs, repair cash and payments that arrive after delivery. A business with enough money to open can still run short before its first invoices are collected.

The intended freight

Cargo • customers • geography



The actual equipment

Ratings • condition • insurance proposal



The cash plan

Start costs • weak week • collection timing



The purchase decision

Buy, wait or revise the plan with evidence

A planning sequence for the purchase. Each stage needs its own evidence; this diagram does not establish authority or insurance coverage.

Consider three operating weeks on paper: a normal week, a weak week and a week with a breakdown. Estimate miles, revenue, days away and cash due in each. If the weak week requires borrowing simply to buy fuel, find the gap before signing for equipment. Delay can be a sound decision when it preserves the money needed for a workable launch.

Hotshot and semi operations need their own assumptions. Equipment capacity, fuel consumption, maintenance, cargo fit and customer access differ. Avoid importing someone else's semi numbers into a pickup-and-gooseneck plan, or assuming a smaller vehicle automatically has a stronger margin. Build the comparison around the work each setup can legally and practically perform.



The attractive truck

Mara is a fictional buyer who can cover a down payment and the first insurance installment. A dually and trailer are available this week. She has a payment estimate, a picture of a load board, and a friend who says the freight is there. She has not asked which customers will accept her proposed carrier, whether her chosen equipment can serve the commodities she wants, or how she will buy fuel during the first month before collections. The purchase feels like the beginning of the business. On paper, it is the first large commitment of cash.

Her first draft budget puts \$9,000 on the equipment line and \$2,000 beside insurance. She then adds a \$2,800 repair reserve, \$1,600 of securement and operating equipment, \$2,400 for two weeks of expected fuel and tolls, \$3,000 for bills coming due before an invoice can reasonably be paid, and \$4,000 for household needs during a slow start. These figures are fictional. The exercise reveals \$13,800 of additional planned cash beyond those first two lines. A quote might change every number. The point is to list the obligations before the truck makes them unavoidable.

The purchase decision

Build three columns before you sign: what is quoted in writing, what you estimate, and what is still unknown. Put the person who can verify each unknown beside it. The broker can state its onboarding rule; the insurance professional can describe the offered policy; the equipment seller can identify the vehicle and warranty terms. None of those people can promise the entire business will work.



Buy the work before you buy the equipment

The seller knows the truck. You need to know the business the truck is being asked to support. Begin with a plain description: the commodities, expected origins and destinations, likely customers, delivery conditions and equipment limits.

“Whatever pays” is an expensive equipment specification. A pickup and gooseneck suited to one kind of machinery may be a poor answer to another shipment with different loading, height or securement needs.

Ask potential buyers of the transportation what they actually require. A useful answer identifies equipment, insurance, appointment practices, acceptance conditions and the way they tender work. It does not have to include a promise of freight. You are testing whether the proposed operation can compete for suitable work, not collecting compliments about a truck you already want.

Before closing, arrange an independent inspection appropriate to the truck and trailer. Obtain records the seller can substantiate, identify immediate repairs and ask a qualified technician about the intended duty. A pickup’s appearance does not establish towing suitability. A trailer’s deck length does not establish usable payload. Put the actual vehicle ratings, intended loading and insurance quote in the same decision file.

Separate a one-time purchase from a recurring obligation. A bargain that adds a payment, maintenance exposure and insurance cost starts consuming cash even when the freight plan is unfinished. Renting may avoid one commitment while introducing availability, mileage, permitted-use, maintenance and coverage restrictions. Compare the actual terms rather than treating rental as automatically cheaper or more flexible.



Mara's fictional startup budget totals \$24,800. That is the \$11,000 she first noticed plus \$13,800 she initially left out. It is not a recommended reserve or industry startup price. Her decision changes when one line is unsupported: she cannot treat an insurance estimate as a bound policy or a friend's revenue prediction as an accepted customer. Each missing answer deserves its own owner and date.

Four conditions before the purchase

Write down what must be true for the purchase to make sense: equipment suitable for the intended freight; an insurance proposal for the actual operation; credible customer-access assumptions; and sufficient cash through a weak collection period. A condition can remain unresolved. What it cannot do is disappear from the plan simply because the seller wants an answer today.

Keep the business identity consistent

Keep the entity's exact legal name, formation records and any trade-name documents together. Confirm that the bank, insurer, carrier registration and customer packet use the correct identities. A logo or website spelling is not proof of the legal name. Resolve punctuation, ownership and address discrepancies before they spread across new applications.



The IRS says an LLC or corporation should be formed with the state before applying for its EIN. The IRS issues the EIN without a government fee, and a third-party designee needs signed authorization. Private preparation assistance is a separate service and fee. Save the actual confirmation letter; an application worksheet is not the same record. [S25]

Create a readiness folder for the entity records, EIN confirmation, relevant carrier registrations, insurance evidence, equipment information and actual agreements. Sensitive IDs and account materials belong in a secure channel with appropriate access. This organizational recommendation does not mean every document applies to every entity or that possession of the folder clears a load.

Your next action: complete the startup cash sheet. Circle every estimate that has no quote, record or named source behind it. Those circles tell you what to investigate before the purchase.



02 Find out what the whole trip leaves

A load pays for a movement. Your business pays for everything required to perform it. The quoted loaded rate leaves out the empty trip to pickup, the time at the dock, the route after delivery and the days before the invoice turns into cash. Put those parts back into the decision.

For the fictional trip in this book, a carrier receives \$2,400 for 800 loaded miles. It drives 200 additional empty miles. The advertised loaded rate is \$3.00 per mile; revenue across the 1,000 total miles is \$2.40 per mile. Neither figure is profit. They are two ways to describe the same revenue, and they answer different questions.

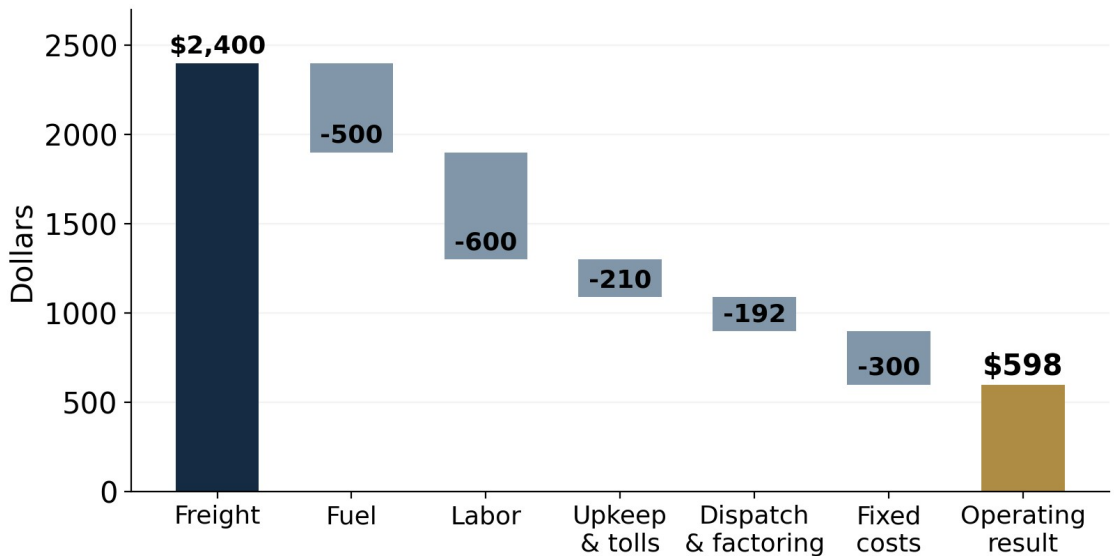
Now enter the costs. At 8 miles per gallon and a hypothetical \$4.00 per gallon, driving fuel is \$500. Assume \$600 for driver labor, \$150 for maintenance and tires, \$60 for tolls and trip charges, \$120 for dispatch and \$72 for factoring. These illustrative amounts total \$1,502. The \$898 remaining is contribution toward fixed costs, other obligations and profit. It is not a take-home promise.

For this example, allocate \$300 of fixed operating costs to the trip. That leaves \$598 as a simplified operating result before tax and other excluded items. If you instead need \$200 of loan principal during the same period, the cash available falls to \$398 even though principal generally is not an operating expense. The distinction matters when the bank balance and the income statement seem to tell different stories.

Use consistent treatment of owner labor. If the owner drives, the time still has economic value. For planning, include a reasonable labor allowance and label it. Your accountant can



explain how actual owner compensation is recorded for your entity and tax treatment. Do not record a planning allowance as an actual expense merely because it appears in a calculator.



Fictional trip. Revenue is \$2,400; simplified operating result is \$598 before tax and excluded items. Loan principal cash is treated separately. This is not a current rate or client outcome.

The load that looked better on the board

Drew, a fictional working owner, sees two possible loads for his truck. Load A offers \$2,400 for 800 loaded miles and would require 200 empty miles around it. Load B offers \$2,100 for 650 loaded miles but 100 empty miles, and the delivery appointment may cost an extra night. The loaded rate makes B appear stronger at roughly \$3.23 a loaded mile against A's \$3.00. Across all miles, B is \$2.80, still higher than A's \$2.40. That comparison is useful, but it does not settle which load is best.

Suppose B adds \$180 for lodging and parking and a day of labor or lost availability that Drew must value. Suppose A has



a later delivery near a customer already willing to book the next movement. Those assumptions change the choice even while B's revenue per total mile remains higher. Drew must check appointment certainty, the next position of the truck, who pays detention, and when a complete invoice can be submitted. A single rate metric cannot carry all of those decisions.

The useful measure

Use revenue per total mile as an early screen, then calculate contribution after costs you can attribute to the trip. Reserve a separate line for fixed costs and a separate cash calendar for payments that will come due. Keep revenue, operating result and cash available under different labels. A profitable looking load can still demand cash you do not have before collection.

Reconcile the estimate against the completed movement. If the truck drove 55 more empty miles or waited seven hours longer, write the difference and why. The point of a load worksheet is not to congratulate a prediction. It is to improve the next decision.

A busy truck can still lose the argument

A useful load decision has three views. The first is contribution: revenue less costs attributable to taking the movement. The second is the business result after a reasonable share of fixed obligations. The third is cash: what must be paid before the customer pays you. Keep them separate. An allocation is useful for judging whether the business supports itself over time; an incremental comparison can help choose among immediate alternatives. Neither excuses unsafe or unauthorized work.



Consider another fictional offer: \$1,800 for 600 loaded miles, with 200 empty miles around it. The advertisement can honestly show \$3.00 per loaded mile. The business receives \$2.25 per total mile. Assume, solely for teaching, \$2.10 per total mile of defined costs and owner labor before dispatch, and a dispatch fee of 10% of that \$1,800. The modeled costs are \$1,680 and the fee is \$180, leaving a \$60 loss. The attractive headline rate and the unfavorable result describe the same load.

That calculation does not establish a universal minimum rate. Define what the \$2.10 contains, avoid adding those items twice and check the time commitment. A load that uses two days cannot be compared with a one-day movement by mileage alone. A return option that is merely hoped for should appear as a scenario, not as revenue already earned.

In the book's original \$2,400 example, dispatch is \$120: an illustrative 5% of gross. The second example deliberately uses an illustrative 10%. Both are teaching assumptions, not THS price quotations. In a real agreement, the percentage and its revenue base must be stated. If a fee includes fuel surcharge or accessorial, calculate that treatment explicitly.



Price the uncertainty you can identify

Before accepting, ask what is known about loading time, unloading time, detention terms, cancellation, accessorial approval and the next location of the truck. A promise that someone will “take care of detention” does not tell you whether the customer has accepted a charge. Put uncertain amounts outside the base case until the agreement or evidence supports including them.

After delivery, compare estimated and actual miles, time, documents and cash. The discrepancy is useful information. A consistent 100-mile omission in empty positioning can damage a month more than a small improvement in negotiated linehaul. Review the whole trip while the details are fresh enough to change the next decision.

Your next action: take one completed load and reconstruct the entire trip. Use actual settlement, mileage, fuel and billing records. Mark missing costs explicitly. Do not let an empty cell become a zero without a reason.



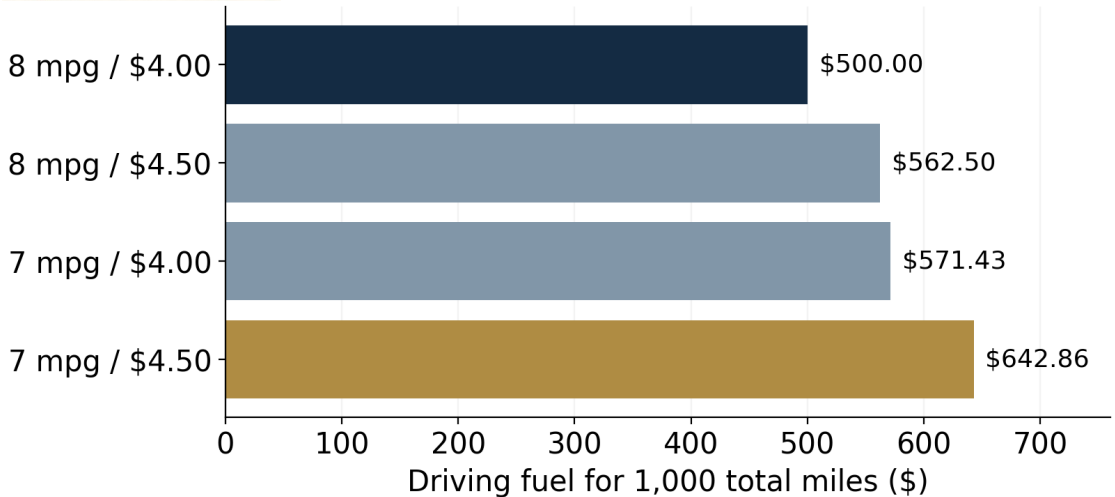
03 Build a diesel survival strategy

You cannot control the price at every pump. You can control how carefully fuel enters the load decision, how you buy it and whether the records show what happened. A diesel strategy starts with measured consumption for your own equipment and operation.

Record odometer readings, gallons, purchase location and total amount paid. Compare several complete fill intervals rather than judging fuel economy from one partial fill. Separate unusual idle time, weather, terrain, traffic and load conditions when the records allow it. The point is to find a pattern you can act on without blaming the driver for a difference the data cannot explain.

Use a dated EIA regional diesel series as a benchmark, then compare it with your route's available prices and your actual purchases. A regional average does not tell you what one station charges or what your fleet card will settle. Discounts also need a full comparison: transaction fees, network availability, credit terms and extra miles to reach the pump. [S1]

The sensitivity is simple. For 1,000 miles at 8 mpg, a \$0.50 increase per gallon adds \$62.50. At \$4.00 per gallon, a drop from 8 mpg to 7 mpg raises driving fuel from \$500 to about \$571.43. These are hypothetical calculations, not current fuel prices or fleet performance. Run both changes through the margin before accepting work.



Fictional 1,000-mile trip. Only driving fuel changes; the other example costs stay fixed. Prices and mpg are assumptions, not current quotes.

Review avoidable idle time and maintenance with the driver and qualified technician. DOE identifies idle reduction as a way to reduce fuel consumption and engine wear. Equipment needs, driver comfort and safe operation remain part of the decision; this book sets no blanket shutdown instruction or promised savings percentage. [S2]

Where a fuel surcharge is part of a contract, read its base price, mileage basis, index, adjustment interval and payment treatment. Do not assume the surcharge fully reimburses your fuel bill or appears on every load. Confirm what the written agreement actually provides.

A small fuel error across a hard week

Drew estimates eight miles per gallon from the dashboard. His fuel receipts and odometer notes later suggest closer to seven on the routes and weights he actually ran. On the fictional 1,000-mile trip, that gap is about 17.86 gallons. At the illustrative \$4.00 per gallon, the fuel estimate was short by roughly \$71.43. One trip does not establish a permanent fleet



average. It gives him a reason to measure enough complete trips to make the next estimate less fragile.

The cheap pump can be the expensive stop

Suppose a fictional driver expects to buy 80 gallons. A station offers a price 12 cents lower but requires 24 extra miles. The apparent discount is \$9.60. At an assumed 8 mpg and \$4.00 per gallon, the detour alone consumes \$12 of fuel. Waiting, labor and wear have not entered the comparison. The lower posted price loses before those additional costs are considered.

This does not mean every detour is wrong. It means a fuel stop belongs to the trip plan. Verify access for the combination, safe stopping, hours and fuel-card terms. Compare the settled purchase cost, including applicable fees, rather than a sign or app advertisement that excludes the terms your carrier will actually receive.

Put diesel in the weekly cash plan

Across a fictional 2,000-mile week at 8 mpg, \$4.00 diesel requires \$1,000 of driving fuel. At \$4.50 it requires \$1,125. The extra \$125 is payable whether or not the customer has paid the invoice. A fuel surcharge might offset part of it under a particular contract, but an expected surcharge is not a cash deposit.

Keep a small operating record by truck: opening and closing odometer, gallons, actual settled cost, idle conditions, unusual route or weather, and the estimate used before the trip. Review several consistent measurement periods. A partial fill or missing receipt can make one week's mpg misleading. Use the record to investigate maintenance or operating



differences with the driver, not to invent a performance accusation.

For operations subject to fuel-tax reporting, purchase records and jurisdiction mileage need a deliberate collection method. Texas's Comptroller explains that certain pickup-and-trailer combinations can qualify for IFTA and that appropriate credentials or a fuel trip permit may be required for interstate travel. Vehicle and operation facts determine applicability. A fuel-tax credential or trip permit does not grant missing operating authority. [S19]

Your diesel survival routine

Before the week, stress the fuel price and mpg in the cash forecast. Before the trip, plan practical stops on a feasible route. After settlement, reconcile receipts and fees. During the review, assign one investigated variance to a person and a next action. The routine is a management recommendation; it is not a promise that any truck will achieve a particular mpg or savings rate.

Your next action: choose a weekly fuel review time. Record total miles, gallons, settled cost, mpg, unusual idle hours and the variance against the plan. Assign the follow-up to a real person. A fuel program needs a decision after the report.



04 Choose a dispatcher who can explain the decision

A dispatcher's first useful answer may be that a load is unsuitable for your carrier. The truck may be in the wrong place. The appointment may consume too much time. The broker may not accept the carrier. The cargo may exceed the equipment or insurance terms. Those checks belong before a rate discussion becomes a commitment.

Clarify the fee basis in writing. If compensation is a percentage, identify the revenue included: linehaul, fuel surcharge, detention or other accessorial. If it is a flat fee, identify the period, supported trucks and included tasks. Ask what happens with cancelled loads, unused days, after-hours issues and termination. A small quoted percentage can be difficult to compare when providers include different work.

Dispatch support does not automatically include every administrative job around the movement. Decide who handles carrier packets, rate confirmations, tracking, driver updates, detention requests, BOL and POD collection, invoicing and payment disputes. An owner who thought someone else was billing can discover the missing responsibility after the truck has delivered.

FMCSA's final guidance explains that dispatch services can fall within broker or bona fide agent roles depending on the activities performed. A business name alone does not settle the classification. If a proposed arrangement involves allocating traffic among carriers or accepting freight before identifying a carrier, obtain a review of the actual model against the guidance. [S3]



A dispatcher who says no

Drew's fictional dispatcher finds an appealing load. The broker can provide a rate confirmation, but the freight dimensions do not match the equipment information on file and the delivery window leaves no credible room for the driver. A poor process turns that into a last minute emergency. A sound process holds the load while the carrier verifies the details and approves a workable plan. Declining the freight may produce no commission on that load; it can still be the most valuable decision the dispatcher helped make.

At the interview, Drew asks two candidates to work the same fictional scenario. One describes a list of broker contacts and the loads they can find. The other asks where the truck will be, how the driver hours and appointment fit, what is known about the cargo, who can approve the rate, which documents are needed afterward and how a missed pickup would be escalated. The second answer shows a process he can examine. It is not proof of performance, but it gives him a basis for a first written scope and a short review period.

The agreement names who performs each step. Finding a load is different from approving it. Returning a rate confirmation is different from submitting a complete invoice. Following up on detention is different from promising it will be paid. The carrier retains control of its actual operating decisions. The provider's role must also be checked against applicable broker and agent guidance when its activities raise classification questions [S3].



Ask for a demonstration before the sales pitch

Give each prospective dispatcher the same fictional movement. Provide a truck location, equipment configuration, driver availability, intended commodity and one missing piece of information. Let the provider ask questions before discussing rate. A person who immediately says the load is bookable has skipped the very work you are paying them to perform.

Ask what happens when the broker changes an appointment after approval. Who tells the driver? Who evaluates whether the revised plan can be performed? Who records the carrier's decision? Then ask what happens when delivery documents are incomplete. The answer should cross the handoff into billing without quietly claiming that every provider's scope includes invoicing or collections.

A first-month service review

Review process evidence alongside economics. List decisions made, loads declined and reasons, total miles, time used, document completeness, fee calculations and unresolved payment issues. Use actual records. Ten decisions can be a useful first review sample; it is not a statistical verdict on a provider or the entire dispatch market.

A dispatcher can improve a process while a weak market reduces gross revenue. A rising market can also hide poor service. Ask whether the provider performed the agreed checks, respected carrier approval and closed assigned work. Keep market changes, driver constraints and changes in available equipment visible when evaluating the result.



Control survives the agreement

Do not hand over broad credentials because the provider needs one task performed. Use approved role access where available and keep the carrier's bank, identity and final submissions under the appropriate authority. Specify access return, data ownership, notice, unresolved load files and billing handoffs at termination. A difficult exit can erase the convenience of a low introductory fee.

The legal classification question remains separate from service quality. FMCSA's dispatch guidance evaluates what the business actually does, including certain freight-allocation and intermediary activities. Ask qualified counsel to examine an arrangement that may cross into brokerage. A well-written sales script cannot cure an operating model that needs different authority. [S3]

Your next action: use the dispatcher interview sheet before signing. Keep the written scope beside the first month's results. Ask about any task that neither document clearly assigns.



05 Get accepted before you promise the load

A carrier can have a public registration record and still be unable to book a particular customer's freight. Customer acceptance, operational readiness and legal permission to perform the movement are separate checks. Treat each as a question that needs its own evidence.

Build a current carrier profile from authoritative records and documents under the carrier's control. It should describe the legal entity, relevant authority, equipment, driver availability, insurance contact and coverage relevant to the intended freight. Record who verified the information and when. A copy saved months ago may be useful history but needs a fresh check before a new decision.

Ask the specific broker or customer about its onboarding conditions. Some conditions may concern authority history, safety information, insurance, identity checks, equipment or the commodity. Do not convert one company's response into a universal rule about how old an authority must be. Record an approval, a refusal or an unresolved condition accurately.

Confirm the person and business behind a load through independently obtained contact details. Compare the rate confirmation, company identity and payment instructions. If instructions change unexpectedly, pause and verify them through a known channel. Familiar-looking branding or knowledge of your USDOT number is insufficient on its own.

Give the driver the details needed to perform the accepted work: the approved route where applicable, appointments, contacts, cargo information, securement requirements and



escalation instructions. The driver must be able to report a mismatch at pickup without being pushed to move first and sort it out later.

The application is not the acceptance

Mara has entered her company information into a customer portal. She tells a prospective driver that the customer is ready to work with them. When the driver asks for a load, a missing coverage condition appears. In this fictional scenario the application existed, but approval for the particular work did not. Mara writes down the difference before she buys specialized equipment to serve that customer.

Who actually sent the load

Drew receives revised pickup details from an unfamiliar email address. He compares the message with the rate confirmation and calls a known number obtained independently from the counterparty's verified records. He does not confirm the change through the number inside the suspicious message. That pause is a small operating control. It is also a way to avoid treating an unverified instruction as a new obligation for the driver.

Build a customer acceptance register

Use one row per counterparty, not one reassuring statement that “we work with brokers.” Record verified identity, relevant contact, application state, accepted equipment and commodity, open conditions, payment instructions and the date of confirmation. Keep proposed customers outside the revenue forecast until a defensible assumption supports using them.



Three rows can expose the problem quickly. One customer has the carrier packet but has not approved insurance. Another accepts the carrier but not the trailer being acquired. A third has accepted the relevant operation, but the customer's expected freight does not fit the intended geography. These are different work items. Calling all three "broker access" hides the decisions still required.

Authority, acceptance and capability

FMCSA distinguishes a USDOT identification number from operating authority required for certain interstate for-hire transportation, subject to the operation and applicable exceptions. A docket number or submitted application is not proof that all required authority is active. Check current official status and the movement's requirements before accepting the work. [S11]

Interstate character can depend on the intended transportation movement, even when your truck's particular leg stays inside one state. Do not classify a shipment solely by a local pickup and delivery address. Use current official guidance and obtain clarification where the shipment's character is uncertain. [S12]

Customer acceptance adds another layer. A broker's authority-age policy is its own condition, not a universal FMCSA rule. Equipment, driver availability, insurance and operational readiness add still more. Put the actual evidence beside each question rather than assuming an approval in one category settles the others.



Stop treating portal submission as a completed job

When a portal accepts an upload, save the receipt and identify what it proves. It may prove only that documents reached a system. Record a separate acceptance or open condition when the counterparty provides one. Recheck meaningful changes before the next commitment. The record protects you from buying equipment for a customer relationship that exists only in an optimistic conversation.

Prepare for the duties that continue after registration

Identify the safety, driver, equipment and operating records required for the actual operation, including applicable hours-of-service and drug/alcohol obligations. Obtain qualified guidance where scope is uncertain. FMCSA describes an 18-month New Entrant period and a safety audit within 12 months after operations begin for the program it describes. A registration service does not remove continuing carrier responsibilities. [S24]

For CDL owner-operators operating under their own authority, FMCSA's Clearinghouse resources describe both driver and employer duties, including designated C/TPA and query/consent requirements. Those roles differ when operating under another employer's authority. A Clearinghouse designation is separate from Motus TSP access. Verify which arrangement applies. [S26]

Your next action: identify three counterparties you intend to work with. For each, write the current onboarding status and the next unresolved condition. Do not count an application sent as an application approved.



06 Can your truck or carrier actually haul it

Specialized freight can display a rate that gets everyone's attention. It also deserves a more complete decision. The load's dimensions, weight, center of gravity, support points and loading method need to match equipment and a workable movement plan. A higher gross payment can disappear into costs that were never quoted.

Get verified cargo information before promising equipment. Ask how dimensions were measured, whether protrusions are included, what the gross load weighs and whether the load can be divided. Identify who loads and unloads, what equipment is needed at both ends and how securement will be achieved. A photograph can support the conversation but cannot replace measurements.

Check the truck, trailer, axle configuration, capacity and securement with qualified people. Check the carrier's authority and operation, the driver's qualifications for the movement and the insurance terms applicable to the cargo. Ask the insurer about exclusions, valuation and limits rather than assuming a certificate answers every cargo question.

FHWA explains that federal authorities do not issue oversize or overweight permits; permitting is a state function. Review each applicable jurisdiction and the actual permit conditions for the movement. Requirements for routing, travel windows, escorts, clearances or other controls can vary with the load and route. A permit in one state does not establish permission everywhere else. [S4]



Price the movement after the route is understood. Include permits, route work, escorts where required, deadhead, tolls, loading arrangements, permitted travel time and possible waiting. Separate vendor estimates from issued permits and confirmed services. An unconfirmed escort is not a scheduled escort, and a standard navigation route is not a permit route.

A written THS specialized-freight scope should name the particular work: carrier self-permitting guidance, permit and route administration or escort coordination where agreed. The carrier still needs the correct permissions and a verified movement plan. Do not treat a discussion with a service provider as permission to move.

The expensive yes

Rae is a fictional owner whose driver wants an oversized industrial load. The posted gross is higher than the freight they usually haul. The first photograph does not show a measurable width, and the stated weight does not explain the support points. Rae's first useful response is a request for verified dimensions, loading method and the intended route, not a counteroffer.

She opens an estimate with separate lines for permitted routing, travel windows, escort services where required, equipment and securement, empty repositioning, loading delay, time away and cash due before delivery. She asks the applicable jurisdictions and qualified permit contacts about movement conditions. FHWA's overview explains the state role in oversize and overweight permits [S4]; it does not grant permission for this specific load. An expected permit cost is not a permit issued.



If the shipper revises a dimension after the quote, Rae stops and checks the whole movement again. A few inches may change the permitted route, escorts or timing in a particular jurisdiction. The correct answer could be a different rate, different equipment or a declined load. Specialized knowledge is valuable because it helps a carrier distinguish an attractive gross from a movement it can actually perform.

Four kinds of capacity

A movement has equipment capacity, driver capacity, legal permission and commercial feasibility. Equipment capacity concerns the actual truck, trailer, axles, loading and securement. Driver capacity concerns qualifications, restrictions, available duty and the ability to execute safely. Legal permission concerns the operation and jurisdictions. Commercial feasibility concerns whether the complete cost and time fit the rate. Passing one test does not pass the other three.

For a hotshot combination, verify the actual ratings and weights; do not build the decision around a trailer advertisement saying “non-CDL.” FMCSA’s Class A definition considers specified combination rating or actual weight thresholds and the towed unit. State requirements, endorsements and individual restrictions must also be checked. An operation that does not require that class of CDL can still have other commercial vehicle obligations. [S13]

Turn the oversize quote into a movement file

Before confirming price, obtain a measured cargo description, proposed configuration, loading plan, expected jurisdictions and verified constraints. Next identify the permits, route



work, travel windows and escort requirements. Obtain the required permissions and service confirmations before movement. A quote should state what depends on measurements or approvals that remain open.

Texas provides a useful example of why generic escort advice is unsafe. Its published table assigns different escort arrangements according to dimensions and roadway conditions; other jurisdictions can differ. Use the actual permit and current jurisdiction requirements for the particular load. A Texas example is not permission to repeat the same arrangement nationally. [S20, S21]

Cargo securement also needs a load-specific review. FMCSA publishes general and commodity-specific rules for covered operations. The presence of straps in a photograph does not establish their ratings, attachment suitability or a compliant plan. Use the applicable requirements and qualified judgment. [S22]

The valuable refusal

Rae receives an attractive rate but no verified height or support-point information. She can request the missing details and give a conditional estimate; she cannot turn them into certainty by accepting quickly. Put every unresolved material item in the movement file with an owner. If the issue changes the equipment, coverage or route, return the decision for approval before the driver proceeds.

Your next action: use the specialized-load decision sheet. Hold acceptance while a material capacity, coverage, permit or route question remains unresolved. The right refusal protects the next load you can actually perform.



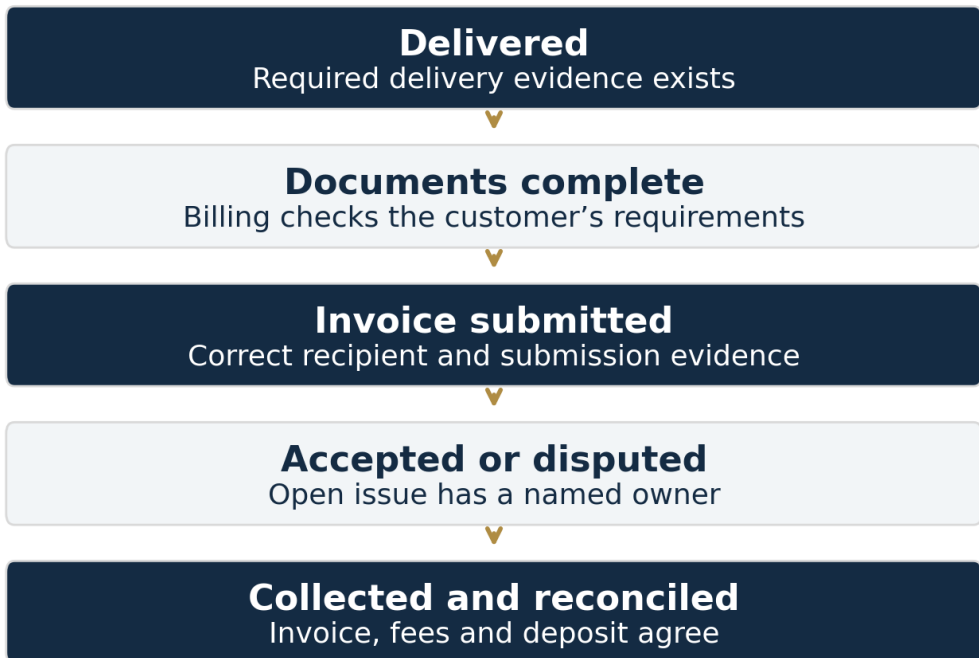
07 Stop delivering loads that cannot be billed cleanly

Delivery finishes the movement. It begins the final work needed to collect. A missing signature, an unreadable POD or a mismatch between the invoice and the rate confirmation can hold money that the business has already spent.

Create a load file with a single identifier that follows the trip from booking to payment. Save the agreed rate and amendments, pickup and delivery records, accessorial evidence, invoice and relevant correspondence together.

Decide who checks completeness and who submits the bill. If a TMS creates an invoice automatically, still confirm that it was sent correctly and accepted by the required billing channel.

Treat detention and other accessories as documented requests under the applicable agreement. Record arrival, release and supporting communications. Obtain the approval the contract requires. Do not add a charge simply because the driver experienced a delay; find out what can be billed and what evidence is necessary.



Delivery and collection are different states. Adapt the billing and acceptance process to the actual customer agreement.

Factoring changes the cash path and adds contract terms. Compare advance amounts, fees, recourse conditions, reserves, chargebacks, termination terms and customer approval requirements. Reconcile the settlement to the invoice and the bank deposit. Money advanced is not proof that every obligation around the invoice has ended.

The unpaid week begins at delivery

Drew's truck delivers on Friday. The driver photographed a signed page but one required reference is missing. The broker's billing instructions call for the full POD and rate confirmation. By Monday, nobody has checked whether the image is readable or whether the requested documents reached the right address. Drew calls this a payment problem.



The first problem is an incomplete handoff inside his own process.

Close the loop

Use a weekly aging meeting built from actual load files. For each delivered movement, identify the missing document or the acceptance receipt. Follow a dispute with its deadline and named owner. The objective is not to send more reminders indiscriminately; it is to know which part of the money path needs correction. That gives dispatch, billing and the driver a shared definition of a finished load.

Follow one invoice through every handoff

Begin with a load identifier that appears on the rate confirmation, delivery evidence, invoice and settlement. The driver returns the required documents. The billing owner checks legibility and completeness against the customer's actual instructions. The invoice goes to the correct channel. The record shows submission, any acceptance or dispute, contractual due date and collection. A person owns the next action at every stage.

Record the missing item specifically. "POD incomplete" could mean an unreadable signature, missing page, incorrect reference or an unapproved change. The driver cannot fix a vague complaint. Give the person the exact discrepancy, requested evidence and agreed follow-up. Save the revised document with its date rather than overwriting the only copy of the original.



A factoring deposit needs a reconciliation

Suppose a fictional \$2,400 invoice produces a \$2,208 initial deposit, a \$72 fee and a \$120 reserve. Those amounts total \$2,400. The cash received is \$2,208; the fee and reserve are different items. Whether the reserve is released, reduced or used for another obligation depends on the actual agreement and events. This is arithmetic for a teaching example, not a description of a particular factor's product or accounting classification.

Ask who pays when the customer disputes delivery, when an advance can be charged back, what accounts must be factored and how termination works. Compare the written terms with the operation's cash plan. An introductory fee without recourse, reserve and exit details is an incomplete buying decision.



Protect changed payment instructions

If a counterparty suddenly changes bank details or asks for a new payment channel, verify the change using a known, independently confirmed contact. Keep the request and verification evidence together. The same care applies when your carrier sends its own updated remittance information. Do not let an unfamiliar message redirect money merely because it carries a familiar logo.

The monthly report should reconcile load revenue, fees, reserves, advances, deposits and remaining balances. Ask the accountant how the agreement affects the books. A fast deposit solves a timing question; it does not, by itself, settle collectability, dispute exposure or the accuracy of reported revenue.

Your next action: find the oldest unpaid delivered load. Establish whether the bill was submitted, whether it was complete, whether it was accepted and what specifically prevents payment. Fix that process before creating more of the same backlog.



08 Hire bookkeeping before the records become a mystery

A bookkeeper can organize and reconcile records. An accountant or qualified tax professional can help interpret financial and tax questions within their engagement. Buying one service does not automatically buy the other. Write down the work you need before choosing the person who will do it.

Separate business spending from personal spending and make every transfer explainable. Keep source documents accessible through an approved channel. Banking exports are useful, but a transaction description alone may not show whether a payment bought equipment, repaid principal, covered interest or reimbursed someone.

Keep mileage and fuel data organized by vehicle, date and jurisdiction where required for the operation. IFTA and other filing needs depend on the fleet and applicable rules; the provider should identify the scope rather than assuming every pickup or carrier has identical obligations. Ask who validates data, who prepares a return and who is authorized to submit it.

Choose software around the records and responsibilities it must support. A TMS, accounting system and fuel platform can reduce repeated entry, but integrations need testing. Confirm that load identifiers, fees and settlements travel correctly and that duplicate entries are caught. One successful connection does not establish a complete reconciliation.



The bank balance is not the answer

Drew looks at the bank account on Monday and decides the previous week was good. Two loads were delivered but not invoiced, fuel-card charges will settle on Tuesday, and a maintenance bill belongs to the same operating period. His bank balance is real, but it cannot tell him whether the loads produced a margin or whether current cash already belongs to a coming obligation.

The work hidden behind a monthly fee

“We do your books” is too broad to compare. Ask which accounts are reconciled, how load revenue is matched to settlements, how equipment and loans are recorded, how owner transactions are identified, and what happens when source documents are missing. State the expected reports and the review meeting. A bookkeeping engagement should leave you able to explain the company’s position more clearly than before you hired it.

Ask the provider to show a fictional trucking month. Give it one completed invoice, one factored settlement, one equipment payment, one fuel-card statement and one owner transfer. Ask which parts require more evidence. A credible answer admits that a bank description alone may not distinguish loan principal from interest or a draw from payroll. Accuracy begins with the questions a provider refuses to guess away.

The IRS describes recordkeeping systems that clearly show income and expenses and the importance of supporting documents. This book’s monthly closing routine is a management recommendation, not a federal rule that every business must buy a specific software package. [S16]



A practical monthly close

First reconcile the operating, credit and fuel accounts included in the engagement. Next match the delivered-load register to invoices, receipts, fees and unresolved balances. Review equipment purchases, loan schedules and owner transactions with appropriate accounting treatment. Check tax-related records and any payroll or contractor-reporting handoffs within the agreed scope. Finish with a dated list of unresolved items and the person expected to settle each.

Set the closing timetable by agreement with the provider. Do not pretend a fixed date is achievable when the driver and office have not supplied records. A draft report can still be useful if it states what is missing and which decisions should wait. A clean-looking report with hidden gaps is harder to use safely.

What to ask the accountant

Ask about entity-specific owner compensation, estimated taxes, equipment treatment, state obligations and year-end coordination. A bookkeeper may assemble evidence without being engaged or qualified to advise on all those topics. Conversely, a tax preparer may prepare a return without managing your monthly billing queue. Put the boundary and handoff in writing so neither service becomes a substitute for work nobody accepted.



You should be able to answer six questions

What did each truck earn? What did it cost under the report's definitions? What remains uncollected? Which bills are approaching? What cash remains after the near-term obligations? Which missing records might change those answers? You do not need to become an accountant to insist that a paid reporting service explain its outputs.

Your next action: write a monthly service checklist and review it with the provider. Ask for a sample report using fictional data. If you cannot tell what a month's fee produces, clarify the scope before making it recurring.



09 Understand depreciation before you buy for a deduction

A tax deduction can affect the cost of a purchase. It does not make an unsuitable truck suitable or remove its payment obligation. Decide whether equipment serves the business first, then ask a qualified tax professional to model the tax treatment.

IRS Notice 2026-11 and Publication 946 describe the restored 100% additional first-year depreciation allowance for certain eligible property acquired and placed in service after January 19, 2025, with qualifications and elections. Eligibility depends on the property and taxpayer; not every truck purchase receives a full immediate deduction. [S5, S6]

The deduction that could not pay for the truck

Mara hears that a tax deduction will make the new truck almost free. She asks her tax professional to compare two cash plans before she signs. The truck requires real purchase or financing cash, insurance and operating money. An eligible tax deduction may alter the timing of taxes; it is not a lender payment or a guaranteed refund equal to the equipment price. Eligibility, business use, acquisition and placed-in-service facts matter [S5] [S6].

She brings the purchase terms, proposed use, entity information and her existing tax position to the professional. She asks how depreciation choices affect this year and later years, what records must be kept, and whether a claimed advantage survives a weak revenue scenario. The professional's written explanation becomes one input to the



business decision, not the marketing headline that justifies equipment she otherwise cannot support.

Drew, meanwhile, wants to know why a month with cash on hand produced a different taxable figure. The answer may involve timing, loan principal, owner transactions, depreciation and other facts his records must establish. This book does not decide his tax treatment. It gives him the questions and a reason to maintain records that make the professional's work possible.

The equipment test remains

After the tax discussion, return to freight, contribution and cash. Which work can the truck perform? What happens in the weak month? Will the operating margin support the payment and the cash reserve? If the answer depends entirely on a tax estimate, the purchase case is unfinished.

A deduction is not the purchase money

Use a deliberately simplified example. Suppose a tax professional determines that \$60,000 is deductible in the relevant year and that the deduction reduces income otherwise taxed at an assumed 24% marginal rate. The arithmetic tax reduction is \$14,400. It is not a \$60,000 refund, a lender payment or proof that the owner has cash to operate. Actual tax effects depend on the taxpayer, limitations and facts; this example makes no eligibility determination.

Compare the tax estimate with purchase cash due, debt service, insurance and working capital. If the business cannot fund fuel before its first collection, a deduction does not fix that immediate shortage. A tax-efficient unsuitable truck is still unsuitable for the freight plan.



Make the tax discussion happen before closing

Bring the acquisition documents, intended and actual business use, cost detail, financing and placed-in-service evidence. Ask about available depreciation choices, their timing, later sale or changed use, and federal versus state treatment. Buying in December and being ready for the intended business use can be different facts. The professional should determine which dates and rules apply. [S6]

Section 179 and the additional first-year depreciation allowance are different provisions. This book does not prescribe either election or substitute a seller's description for a tax review. The current IRS publication and Notice 2026-11 are the starting sources for the professional's analysis. Keep the written recommendation with the equipment file. [S5, S6]



The better year-end question

Instead of “What can I buy to pay no tax?” ask “Which business investment is justified, what cash does it require, and how should the tax treatment be modeled?” A business with taxable earnings has something to manage. Spending cash solely to make the number smaller can leave the owner with less capacity to survive a slow month.

Use the worksheet to compare a purchase with waiting, renting where permitted, or using existing equipment. The comparison should show the operating case before the tax effect. Only then add the professional’s scenario. The reader’s job is to bring clear evidence and a business purpose; the professional’s job is to apply the rules to the actual taxpayer.

Your next action: send the records through the preparer’s approved secure channel and request a written comparison. Do not post tax returns, Social Security numbers or bank statements in a public trucking group or a general website inquiry.



10 Add an owner operator with a complete handoff

The second truck should not begin with a handshake and a scramble for documents. Start by deciding the arrangement: who is operating, under whose authority, with what equipment and under which agreement. The answer determines who needs to verify the records and what must happen before dispatch.

FMCSA distinguishes compliant equipment leasing arrangements from selling, renting or leasing a USDOT number or operating authority itself. Where the federal leasing rules apply, the written lease under 49 CFR 376.12 addresses parties, duration, compensation, costs, insurance and other responsibilities. The authorized carrier's required responsibility for operation remains part of that arrangement. [S7, S8]

Adding a truck can add a second broken process

Niko, a fictional growing fleet owner, has enough work for another unit. An owner-operator can bring equipment, but the arrangement does not erase Niko's responsibility for work performed under the authorized carrier's operation. He begins with the actual parties, equipment, driver, insurance and lease arrangement, and asks qualified advisors which rules apply before promising a start date [S7][S8].

The first day requires more than a signed packet. The team must know who approves loads, receives documents, pays tolls, manages maintenance issues, checks the driver and equipment, administers settlements and can halt a movement.



Systems access must correspond to the person's role. A training session is complete only when the participant demonstrates the task on a realistic example and knows whom to contact when the example fails.

Niko drafts a first-week plan. The operator practices accepting a changed pickup time, reporting a damaged cargo condition and sending a complete POD. Dispatch practices declining a load outside agreed equipment or operating limits. Billing reconciles one simulated settlement. Each person writes down what they expected someone else to do. The gaps are repaired before a live shipment turns them into a dispute.

The written arrangement

Keep the lease and any other applicable agreements with the actual equipment and parties identified, the settlement method clear, and the operational responsibilities specified. Check 49 CFR Part 376 within its scope and exemptions with qualified counsel as needed [S8]. Selling or leasing a USDOT or MC number is distinct from a compliant equipment lease under an authorized carrier [S7]. Do not use an attractive recruiting pitch to blur that line.

Fast onboarding means fewer unfinished decisions

Speed comes from a repeatable intake, not from skipping checks. Start with the actual arrangement and the responsible carrier. Collect required information through an approved secure channel. Track the agreement, driver and equipment review, insurance, operating records, settlement instructions, system access and orientation. The detailed legal and safety requirements depend on the operation and need qualified review.



Distinguish receipt, review and release. A driver's document arriving in the inbox proves receipt. A reviewer may still find a restriction, discrepancy, expiration or missing verification. The operational release occurs only after the responsible carrier representative has accepted the relevant evidence and cleared material open items.

Where driver qualification requirements apply, organize the file against those actual requirements. FMCSA's Safety Planner explains driver qualification files, including owner-operator application obligations in the covered context. Do not treat an uploaded license or medical-card image as a complete determination of current qualifications. [S14]

Teach the first difficult handoff

Before the first live movement, have the operator demonstrate a changed appointment, an unsafe or mismatched cargo condition, a missing delivery document and a settlement question. Have dispatch demonstrate its escalation and approval process. Have billing identify what it needs to assemble an invoice. A ten-minute exercise can reveal an unassigned task that a signed stack of forms conceals.

Keep the first week supervised. Set an internal review point for the first complete load file and first settlement. These are suggested controls, not a promised staffing schedule or legal minimum. The objective is to find and correct a gap while the team can still explain what happened.



Prepare the exit while preparing the start

The arrangement should make returned records, system access, identification removal, unresolved payments and continuing obligations understandable. Applicable leasing rules and the specific contract control. Avoid promising that a departing operator can take a registration number as though it were rented equipment. [S7, S8]

Clear onboarding helps retention because fewer surprises arrive at settlement. It also helps the carrier decide whether it has enough office capacity to add another operator. One more truck adds another stream of documents and decisions even when recruiting was easy.

Your next action: run one fictional onboarding case through your checklist. Find every step that has no responsible person, no completion evidence or no safe way to hold dispatch when something is missing.



11 Build a fleet that can work when you step away

An owner can remember the details of one truck for a while. More equipment, more people and more customers make memory a fragile operating system. Begin by writing down the recurring work that keeps the fleet moving and collecting.

For each task, state the input, the person responsible, the interval and the output. A delivery record arrives from the driver. The billing owner checks it against the load file. A complete invoice is submitted under the agreed process. The record then shows submission and any acceptance or dispute. That sequence can be reviewed and taught.

Administrative and business-development support should also have a written scope. Decide whether the work includes onboarding, customer follow-up, document administration, operating routines, reporting or other agreed tasks. Identify exclusions and approval limits. More help becomes useful when the owner can tell which responsibility has actually moved to another person.

Review the fleet with a short weekly meeting. Discuss trucks available, operational constraints, missing documents, money due, upcoming obligations and decisions requiring the owner. Carry each unresolved item forward with a person and next action. Avoid turning the meeting into a report everyone hears and nobody owns.

The owner as the bottleneck

Niko receives every changed appointment, missing POD, insurance question, driver complaint and customer request.



His team is busy, but nothing is allowed to close until he replies. He calls this being hands-on. The pattern means the fleet stops moving when he is unavailable.

He draws one operating loop: load inquiry, feasibility check, carrier approval, dispatch, driver execution, document return, billing, collection and review. For each handoff he assigns one owner, one acceptable output and a trigger for escalation.

When a load changes after approval, the team knows which decisions must return to the carrier. When a receipt is missing, billing knows exactly who will ask for it and when.

A training course that people attended does not prove the loop works. Niko gives staff a small simulation, observes the result and then watches a real cycle with a backup ready. The next week he reviews exceptions rather than approving every ordinary step. A procedure is worth the time it took to write when somebody else can run it faithfully and recognize when it does not apply.

Delegate a completed task

Giving someone an inbox is different from giving them a job. Define the input, the expected output, the interval, permitted decisions and escalation. For billing, the input may be a delivered-load file; the output may be a complete invoice submitted through the customer's required channel, with evidence of submission. Define acceptance follow-up separately if it belongs in the role.

Give the backup a real practice case. Ask them to locate the source record, identify a missing item, contact the correct internal owner and record the resolution. If the owner must still explain every ordinary step, the procedure is unfinished.



Improve it before buying another automation tool to move incomplete work faster.

AI can prepare the decision file

AI can help summarize a load record, draft a follow-up, organize an intake or flag a discrepancy under approved access and checking procedures. A person must verify the facts that matter and authorize actions that commit the business. Do not let a fluent summary certify authority, coverage, driver suitability or a payable invoice without the underlying evidence.

Keep access narrow. Use fictional or appropriately redacted training records unless approved permissions allow actual records. Passwords, banking details and identity materials do not belong in a general prompt or public group. A human takeover needs a usable file, not merely a transcript that says an agent “handled it.”

Review the system during a quiet week

Choose one routine interruption that repeatedly reaches the owner. Document it, teach it and review a cycle run by someone else. Record the errors without turning the exercise into blame. Then decide whether the person, procedure or tool needs adjustment. Growth becomes less fragile when the office can finish ordinary work and recognizes the exceptions that need the owner.

Your next action: choose one recurring task that interrupts you repeatedly. Document it, train a responsible person and review the first completed cycle. Expand delegation after the process works.



12 Use the Fleet Planner to question the plan

A calculator is useful when it helps you see which assumption matters. It becomes dangerous when a polished result makes an estimate look certain. Enter figures from your own operation where you have them and label estimates where you do not.

Start with total miles, paid miles, expected revenue, fuel price and mpg. Add driver or owner labor treatment, maintenance and tire allowance, tolls, dispatch, factoring or payment charges and fixed costs. Check whether each figure is per mile, per load, per week or per month before combining it. Mixing intervals can create a convincing result that is mathematically wrong.

For a fleet, model the units separately before combining them. One truck's strong week can hide another truck's recurring loss. Review utilization, fixed obligations and labor capacity. A forecast that assumes every vehicle works every available day needs a clear allowance for maintenance, waiting and other interruptions.

A calculator cannot supply its own inputs

Mara enters a strong revenue estimate into a Fleet Planner and sees a healthy result. Drew enters his actual miles and fuel receipts and gets a lower one. Neither calculation is self-validating. Mara's forecast needs customers and utilization assumptions; Drew's result needs a complete cost and billing record. The tool shows what follows from the inputs, not whether the inputs will happen.



Document every field's unit. If a rate is per loaded mile, a maintenance allowance per total mile, and insurance per month, convert them deliberately. Show the cash due on debt principal separately from operating expense. At the end of each period, replace estimates with observed figures where available. A planning model becomes more useful by admitting where it was wrong.

Check the model with a known answer

Use the original \$2,400 trip as a reference test. A correct implementation should show 1,000 total miles, \$2.40 revenue per total mile and \$500 driving fuel at the stated assumptions. It should keep the \$898 contribution, \$598 simplified operating result and separately modeled \$398 after principal cash distinct. A tool that labels all three “profit” has failed the teaching test even if its arithmetic adds correctly.

Capacity is an input too

If a month assumes twenty operating days, ask whether appointments, maintenance, driver time and return positioning support that assumption. If a fleet model assumes every truck is available, state what happens when one goes down. Office capacity also matters: a truck can be mechanically available while insurance, documents or customer acceptance remain unresolved.

Use three scenarios with the same definitions. The base case contains supported estimates. The weak case reduces activity or worsens a key cost. The disruption case adds a specific interruption or collection delay. Do not average away a cash deficit in the disruption week simply because the month's total looks acceptable.



A decision threshold

Write the condition that would change the plan: less working revenue, more empty miles, a longer collection interval or a required repair. Give the threshold a date and evidence source. A model becomes useful when it tells you what you must learn or protect before acting.

The printed worksheets provide a method you can inspect. Ask THS about the availability and scope of a digital Fleet Planner. This edition does not represent an untested online calculator as a live service or create a working destination that has not been verified.

Your next action: run the worked example in Chapter 2 through your planning worksheet or a calculator you have checked. It should show 1,000 total miles, \$2.40 revenue per total mile, \$500 driving fuel and explicitly labeled exclusions. Investigate any difference before using the result for an equipment commitment.



13 Verify the paperwork claim before you pay

A caller knows your company name and USDOT number. The message looks official. It says a filing is late. Start by identifying the claim: which filing, which agency, which deadline and which record are they referring to? You need that information before deciding whether the caller offers a useful private service or makes an unsupported demand.

FMCSA warns that private vendors may contact carriers after public contact details appear and that impersonation attempts occur. Private sales contact is not automatically fraud. Verify a claimed government requirement through an independently obtained official channel rather than relying on the caller's link or number. [S9]

Do not assume every call from FMCSA is fake. Its New Entrant page states that the Contact Center calls new entrants within the first 90 days, and genuine safety-audit correspondence can require a response. Verify identity and act on genuine requirements; do not use general fraud warnings as a reason to ignore them. [S10]

Keep your Login.gov password, security codes and other credentials under your control. A website question, call, service agreement and any later account permission are distinct steps. A private provider should explain its service fee, the work included and any government or third-party charges separately.

Ask for a defined deliverable. If someone says they completed a filing, ask which filing, when, through which authorized process and what receipt or status supports completion. Keep



the provider's statement separate from what you have independently verified. Where records conflict, obtain clarification before describing a failure as proven.

The official-looking invoice

Mara receives a message using her carrier details and a government-sounding title. It says paperwork is late and payment is due today. She records exactly what the sender claims: which filing, the alleged deadline, the claimed agency and the requested fee. She does not assume the message is genuine because the sender knows public information, and she does not assume every private seller is a scam.

She navigates independently to an official source and checks what applies to her carrier and stage. If the issue might be a genuine audit contact, she verifies the notice and follows the official instructions. FMCSA warns about solicitations and impersonation while also explaining that its New Entrant Contact Center may contact a new carrier [S9][S10]. A blanket rule to ignore all calls would be wrong.

Split the claim from the sales offer

Record the sender's exact demand, claimed deadline, named filing and claimed agency. Then verify the requirement through an independently obtained official channel. Separately consider whether you want private help performing the real work. A legitimate private service can have a fee; a fee does not prove that the sender is a government office.

For example, a fictional caller says Mara's BOC-3 is late. Mara first identifies the carrier and application involved, asks for the basis of the claimed deadline and verifies the applicable



requirement and public status through official sources. An absent or unclear public entry is a question to resolve, not automatic proof that this caller is right or that fraud occurred. A pending application, different operation or incomplete information can change the analysis.

Account designation is a separate decision

FMCSA's modernization FAQs describe the carrier choosing a Transportation Service Provider, the provider accepting, and the carrier reviewing entries and completing required final submissions. An initial question, complimentary orientation, website consent or THS agreement is not that designation. Keep credentials and required identity steps under the carrier's control. [S17]

Ask a provider to identify its actual access and role before it proposes account work. This book makes no claim that THS is government-endorsed or that its Motus company account is currently authorized for your carrier. Those facts must be verified for the contemplated service. State filings, dispatch and other work need their own permissions.



Leave the conversation with a record

Save the official source, retrieval date, verified fact, unresolved question and next carrier-controlled action.

Where THS assists, ask for a documented answer or receipt that says what was checked or submitted. A useful answer can be an official referral. It does not need to become a sale to justify your time.

Your next action: write the claim down, redact sensitive details and use an official channel to verify what applies. If you want private help with a defined correction, request a written scope before authorizing the work.



14 Choose the next piece of work to fix

A list of business problems can become another reason to postpone action. Choose the problem nearest cash, safety or a decision you are about to make. Define a result small enough to verify. It may be a complete billing queue, a reliable cost record, a carrier onboarding condition resolved or an equipment decision delayed until the numbers are ready.

Write the present condition without exaggeration. “Seven delivered loads have not been invoiced” is actionable if the records support it. “Our accounting is a disaster” leaves everyone guessing. Record what is known, what remains uncertain and which documents would settle the question.

Decide whether you can perform the work, need official guidance or need a separately scoped service. A free first conversation can help route the decision. It should not quietly become an unpaid records audit or an implied authorization to file, dispatch or access an account.

Start with a complimentary 15-minute Carrier Fit Call with THS. Call 800-884-8520 to request a phone or video conversation. We hear the goal, identify the relevant THS service or official route and explain a next step. Avery is our Carrier Advisor team name. Your assigned representative is a real person. Ask about current availability; a call request does not promise an immediate answer.

A broader launch decision may fit the \$195, 60-minute Startup Review. A distinct dispatch or operating-economics question may fit the \$195, 60-minute Dispatch Performance Review. A defined paperwork correction can be quoted in writing. Ongoing Admin & BD, dispatch or systems support needs the



applicable scope and agreement. Request the appropriate review or service scope; THS confirms terms and the authorized payment process separately. A review is not a compulsory step before a ready buyer can discuss implementation.

One good repair begins with a specific sentence

Drew says the fleet is not making money. Niko says the office is buried. Mara says she is not ready to buy. Each statement could hide five different projects. Drew identifies three delivered loads without accepted invoices. Niko finds that one person alone approves all routine load changes. Mara needs a current insurance quote for the freight she intends to carry. Those are work items a person can own and verify.

The order of paid work depends on the problem. A buyer who knows exactly which recurring billing and dispatch tasks need handling can discuss an implementation scope without first purchasing a review. Another buyer may need a paid diagnostic to decide what to do. Keep the offer connected to the owner's decision and label any government, carrier or third-party charge separately.

What success looks like next week

The seven-day action sheet ends with evidence: an accepted invoice, a written carrier onboarding condition, a resolved route question, or an approved task owner who completed a cycle. It does not ask the reader to believe a guaranteed increase in loads or earnings. It makes the problem small enough to test and gives the business a way to repeat what worked.



From a missing number to defined work

An owner seeking setup or recovery needs more than an application name. Start with the current entity and carrier records, intended equipment and freight, actual operating status and the unresolved items. Distinguish a missing filing from an inconsistent entity name, an insurance condition, a driver issue or a business process nobody owns. The work plan should follow those facts.

THS's \$6,500 Motor Carrier Setup & Business Development offer is a separately agreed implementation scope. The signed agreement identifies the work, initial filings and fees included, responsibilities, exclusions and start conditions. Insurance premiums, plates, equipment, permits and other third-party charges are separate unless the agreement expressly includes them. Do not infer an all-inclusive package from the headline price.

Ask what completion will look like

For a filing, completion evidence might be a submission receipt and later official status, with those stages distinguished. For onboarding, it might be a reviewed checklist and carrier-controlled release. For business administration, it might be a documented process, assigned person and reviewed operating cycle. The agreement should say which outputs THS owes and which decisions or approvals belong to the owner or an outside party.

THS can perform agreed administrative work and coordinate defined handoffs. It cannot guarantee government approval, insurance underwriting, broker acceptance, loads or earnings. The difference between a useful implementation service and



an attractive promise is whether the buyer can identify the work, owner, evidence and exclusions before paying.

One call should produce one next decision

Bring the problem closest to cash, safety or a pending commitment to the complimentary fit call. Ask whether the right next step is official self-service, a defined correction, a review or a written implementation scope. A ready buyer does not have to purchase a \$195 review just to discuss a service agreement. A free call does not quietly become a completed audit.

Your next action: complete the seven-day action sheet. Give one task a named owner, a due date and evidence of completion. Then review the outcome. Better decisions become a business system when someone repeats them.



15 Sell the service the carrier can actually perform

Freight does not become good business only because a load board displays it. A carrier needs a clear description of the service it can consistently deliver: equipment, geography, cargo fit, scheduling, documentation and the person who can make a decision. For specialized freight, the proposition may include verified dimensions, permits, routing and an operating contact who understands where an ordinary load turns into a different movement. Describe the capability you can document today. Leave future equipment and hoped-for insurance changes in a separate plan.

Rae writes a one-page fictional capability sheet for her current operation. It lists the equipment and capacity subject to verification, the states she is prepared to serve, examples of cargo she can evaluate, an insurance contact and how a shipper or broker requests a feasibility check. She removes a statement about nationwide oversized capability after realizing she has not established the permit and escort network for every route. The narrower version gives a buyer a clearer reason to call and gives her dispatcher a more honest screen.

Find the customers who buy your actual service. Log the contact, their stated need, current acceptance conditions, follow-up date and outcome. Distinguish a lead from a qualified opportunity: somebody may admire the truck but have no freight it can handle. Avoid depending entirely on a single broker relationship or promising capacity to a customer



before the carrier has checked drivers, equipment and availability.

In a first conversation, ask about the freight, frequency, origin and destination patterns, required equipment, timing, documents and how the buyer selects carriers. Listen for predictable administrative demands as well as rate. A customer that needs flawless PODs by the next morning cannot be served by a carrier that has never assigned document ownership. Business development and operations meet at this handoff.

Close the loop after every proposed job. Record why the business won, lost or declined the work. Price, capacity, onboarding, insurance, route and response time are different causes. The next outreach message should reflect evidence from these outcomes instead of a broad statement that the market has no freight.

A capability sheet is a promise you must keep

Write equipment and service descriptions around what the carrier can substantiate. Identify the kind of freight it can evaluate, operating geography, practical scheduling, decision contact and required verification. Avoid a large list of future capabilities that forces dispatch to explain later why the actual truck cannot do them.

For specialized freight, a useful inquiry asks for dimensions, weight, loading conditions, origins, destinations and time requirements before quoting. For ordinary work, appointments, equipment, cargo, insurance and customer acceptance still matter. The sales process should make it easier to obtain those answers rather than treating operational questions as an obstacle to closing.



Build follow-up around the buyer's work

Record what the prospect actually needs and when it decides. Follow up with a useful next step: a corrected capability sheet, a feasibility question, an accepted onboarding condition or a requested scope. A repeated “checking in” message is less useful than one that advances a known decision.

Keep customer development distinct from brokerage. A business-services company receiving a shipper's request must examine the actual arrangement before accepting freight and assigning it among carriers. The legal classification depends on activity, not on calling the process a referral. THS is not a motor carrier; any transportation commitment needs the correct authorized party and operating model. [S3]

Your next action: draft a capability sheet limited to equipment and service you can substantiate. Ask one real prospective customer what would have to be true for it to offer a suitable shipment. Record the answer without treating the conversation as a booking.



16 Put a calendar beside the profit statement

A month can produce a positive operating result and still leave the business unable to buy fuel on Wednesday. Profit, receivables and bank cash move on different clocks. Build a thirteen-week cash view with a weekly beginning balance, reasonably expected collections, fuel and payroll, debt payments, insurance, taxes and repair commitments. Record uncertainty rather than forcing a precise date on a payment nobody has promised.

Drew's fictional calendar begins with \$6,000 in available operating cash. He expects a \$4,000 invoice next week, but its paperwork has not yet been accepted. This week requires \$2,500 for fuel, \$1,800 for driver pay and \$1,000 for insurance. The cash left would be \$700 before an unplanned repair, even if the income statement shows revenue earned. He treats the \$4,000 as uncertain until its status and timing are documented. He now has a specific reason to fix the invoice process and protect a reserve.

Keep household draws visible when they materially affect the business. A single-truck owner may pay personal needs from the same activity, even when formal accounts are separate. Plan for that cash instead of pretending that survival stops at the business ledger. Ask a qualified accountant how owner transactions should be recorded for the actual entity.

Build the cash view from dated obligations

Begin with available operating cash, excluding amounts you cannot use freely. Add collections with their supporting status



and expected date. Subtract scheduled operating payments, debt cash, taxes where planned, required equipment spending and owner cash needs. Show the next week's opening balance as the preceding week's closing balance. Keep uncertain collections visible rather than silently treating them as guaranteed.

In Drew's fictional week, \$6,000 less \$2,500 fuel, \$1,800 driver pay and \$1,000 insurance leaves \$700. Suppose a documented \$1,200 repair is also due before collection. The week becomes negative \$500. A \$4,000 invoice expected later cannot repair the timing unless its payment actually arrives in time. The immediate task is to verify collection, arrange a legitimate funding or timing solution, or change planned spending before the shortage interrupts work.



Give each collection a realistic state

An uninvoiced load is different from a complete invoice acknowledged by the customer. A disputed charge is different from a scheduled remittance. Put those states beside the forecast. For a meaningful decision, compare a supported collection date with a delayed one and identify the lowest cash point under each.

Review the forecast with the actual bank and load records weekly. Record what changed. The exercise should produce an action, such as resolving a missing POD, postponing optional spending or preparing for a maintenance interruption. A thirteen-week sheet that nobody updates is decoration around the same cash surprises.

Your next action: list the next thirteen weeks, major bills and collections with their evidence. Mark the lowest projected cash point. Give one person ownership of the oldest unresolved invoice before assuming additional revenue will arrive.



17 Know what protection was actually purchased

A certificate can tell another party that certain coverage is represented as in force, subject to its terms. It cannot, by itself, answer every question about a shipment's cargo, value, driver, route, equipment or exclusion. Before quoting unfamiliar work, ask the insurance professional about the actual intended operation and get the answer documented in the manner the insurer or agent supports.

Rae considers a high-value industrial movement. The rate is attractive, but the commodity description is vague. She obtains verified cargo details and asks whether the applicable policy terms, valuation and limits address that movement. She does not present a certificate to the customer as proof of every possible claim outcome. She also checks whether subcontracted escort or pilot services require their own arrangements and what her own contract makes her responsible for.

A claims plan deserves the same discipline. Preserve the load documents, photos, communications and relevant instructions; follow policy reporting provisions and professional advice. Drivers should know whom to call and what to preserve. This book does not interpret a policy or predict payment of a claim.

Match the quote to the work

Give the insurance professional the actual intended operation, truck and trailer, drivers, geography and cargo. Ask about effective dates, insured parties, relevant limits and exclusions,



deductibles and how changes must be reported. The policy and qualified advice control; this book does not interpret a particular insurer's terms or promise a claim will be paid.

FMCSA's filing chart distinguishes operation-specific federal liability and cargo requirements. For certain non-hazardous for-hire property operations, federal cargo filing requirements differ from household-goods operations, while a broker or customer may impose its own insurance conditions. A federal filing minimum is not the same as the coverage your buyer requires or the policy your operation needs. [S18]

Add a coverage check to dispatch

Use a verified operating profile to flag unfamiliar commodities, unusual value, different equipment, altered geography or other facts that need fresh advice. When a material question is open, hold the commitment and assign the call to the insurance contact. "We have insurance" is not a specific answer to "Does this proposed work fit the current policy?"

Also distinguish an inspection appointment from completed evidence. FMCSA's Safety Planner describes periodic inspection requirements for covered vehicles and combination segments. A truck's inspection record does not automatically supply a missing trailer inspection. Use the applicable rules and qualified reviewer for the actual equipment. [S15]

Your next action: take the two kinds of freight you most want to haul and ask your insurance contact how the current coverage applies to each. Save the actual written response and the conditions that would require a fresh question.



18 Train for the job that happens after the class

Niko needs another dispatcher. He can teach the screens and scripts in a week, but competence appears when the appointment changes, the cargo description is incomplete or the carrier declines a broker's proposed terms. A training program has to include decisions under pressure, documentation and the right to stop and escalate, not just a tour of the load board.

Start with a role definition. A trainee should know whether the job includes searching, carrier qualification, negotiation within limits, paperwork, driver communication, billing support or after-hours response. Set approval limits in writing. Then use real-world-shaped fictional exercises: one straightforward load, one counterparty discrepancy, one unsuitable cargo, one missing POD and one high-revenue movement with weak cash timing. Require the trainee to explain what evidence would change a no into a yes.

A useful training scorecard

Evaluate whether the learner asks for missing information, identifies limits, records the carrier's approval, communicates a change and passes complete documents to the next person. Speed matters after the process is right. A fast booking that misses the equipment restriction is an error, not a sign of readiness.

Use a progression: observe a qualified person, perform with supervision, demonstrate a fictional exception and then handle authorized work with a backup available. Set the



graduation standard before the exercise. Require another attempt when the learner guesses at a material fact or bypasses approval.

Live learning needs permission and supervision

Real conversations with brokers, insurance professionals, factoring contacts or TMS specialists can make learning more practical when access and permission are appropriate. They do not make an untrained person an authorized decision-maker. Protect carrier, customer and shipment information. Do not expose sensitive live records merely to make a class feel impressive.

A separate dispatch-business training offer can explain business formation and setup assistance only within an approved written scope and qualified provider boundaries. It must distinguish instruction from employment, supplied customers, income, brokerage authority or a functioning business handed over without further work. The book's purpose is to help a reader judge competent training; it does not announce an unapproved course or enrollment date.

Your next action: give a trainee one fictional load with a hidden disqualifier. Ask them to state the questions, decision authority, documentation and handoff before you evaluate their speed.



19 Make the next ninety days visible

A book can leave the reader with too many reasonable actions. Choose one primary business constraint for the next ninety days: cash conversion, load selection, customer acceptance, a missing operating role or an equipment decision. Record a starting measure that you can actually collect. Choose a second measure that prevents you from improving the first at the expense of safety or cash.

For the first thirty days, reconstruct a small sample of completed loads and close the document trail. Set a weekly cash calendar, check fuel purchases against miles and clarify who owns billing. A new operator may instead spend this period confirming equipment, insurance and customer assumptions before purchase. The assignment changes with the stage; the requirement for evidence does not.

In days thirty-one through sixty, test one changed process. A dispatcher uses a written load approval screen. A billing owner closes every delivered load within an agreed internal interval. A fleet manager trains a backup on one recurring task and reviews the first completed cycle. Keep the test narrow enough that you can say whether it happened and what it changed. Do not call a busier month a successful process merely because freight demand improved.

In days sixty-one through ninety, decide what to keep, revise or stop. Compare the same measures with the original records, note changes in equipment, customers, season and fuel, and look for unintended effects. If revenue rose but receivables aged and cash worsened, the new system needs work. If a dispatcher created documented decisions and a



clearer handoff but the market was weak, judge the service with both process and economics visible.

The first thirty days should leave evidence

Choose one constraint and collect a starting record. For a prospective owner, it may be equipment and cash assumptions still missing evidence. For an operating carrier, it may be incomplete invoices or uncertain total-mile economics. For a fleet, it may be an onboarding process with no accountable release owner. A plan becomes useful when the first week produces a document or completed decision you can inspect.

At thirty days, compare the same measures and describe what changed around them. Fuel, available equipment, customer mix and collection timing can affect the result. Keep the review honest enough to revise an unsuccessful experiment. An attractive dashboard is not evidence that the process improved.

What the driver headlines actually establish

On August 31, 2026, USDOT reported more than 28,000 drivers placed out of service for English-language proficiency since June 2025. That is a dated agency-reported enforcement figure. It does not establish 28,000 permanent driver exits, a specific increase in freight rates or a revenue forecast for a hotshot carrier. Other reported license or school figures concern different measures and should not be added to it as a single total. [S23]

An owner can monitor policy, capacity and actual market offers without making a purchase on a headline. Compare current customer acceptance, suitable rates offered to the



actual carrier, empty miles and collections. Treat the proposed August 2026 language-rule changes as proposals unless final status is independently verified. The useful business response is to inspect your own evidence and meet applicable requirements.

Close a loop before opening another

Pick one task, name its owner, define its output and review the result. Then decide what to standardize. The business does not need every possible service at once. It needs the next recurring process to work reliably enough that another load or truck enters something better than the same unfinished routine.

Source note: the August 7, 2026 FMCSA announcement describes proposed rulemaking. This book does not represent that announcement as an adopted final rule. [S27]

Your next action: write the one result you want ninety days from now, the starting evidence, the person responsible and the date of the first weekly check. Keep the plan on a page you will actually open.



Afterword

The truck can be parked and the business can still be working against you. An unbilled load, an unexplained settlement, a missing fuel record or a responsibility nobody accepted can consume the evening that should have belonged to something else.

You do not have to solve every problem at once. Begin with one decision you can explain using your own records. Price a whole trip. Complete an invoice. Check the equipment before the purchase. Ask a dispatcher to show the process. Give a trained person a task with a clear output and review the first cycle.

Then repeat it. The business becomes easier to manage when the next load, driver or truck enters a process that already works. Growth still brings difficult choices, but it need not bring the same avoidable confusion every week.

If you want help with the work, bring the decision you are trying to make. A useful first conversation ends with a next step: official guidance, a defined correction, a separately requested review or a written implementation scope. You should be able to see what is included before you authorize it.



Know what needs to be finished? Hop on a quick call with THS.

800-884-8520

admin@truckingandhotshotservices.com

Complimentary 15-minute Carrier Fit Call. Phone or video by confirmed availability. Avery is our Carrier Advisor team; the assigned representative is a real person. Keep sensitive documents in the approved secure channel for later work.

Request your next step with THS

Just ask. Learn more. Get help.



Worksheets

Make a copy for your own operation. These are planning and task-control sheets, not regulatory certifications, filing authorizations or legal agreements. Use actual quotes and records. Assign unresolved questions to a real person.

Sheet	What it helps you decide
Startup cash and funding	What must be paid before the business collects.
Whole trip and weak week	What the movement contributes and when cash is needed.
Dispatcher interview	Which work, decisions and fees a provider includes.
Monthly close	What records and explanations your provider delivers.
Weekly cash	Where collections and obligations leave a shortage.
Specialized movement	Which measurements, permissions and costs remain open.
Carrier readiness and onboarding	What evidence remains before carrier-controlled activation.
Tax decision packet	What your tax professional needs before purchase.
Seven-day action	One completed task you can check next week.



Startup cash sheet

Use written quotes. These categories are planning prompts, not universal requirements or a recommended reserve. Keep business and household cash separate. Unknown does not mean zero.

Getting ready	Amount	Evidence or open item
Equipment cash due		
Insurance and required setup		
Inspection and repairs		
Securement and tools		
Registration and agreed help		
Systems and training		
Total launch cash		

Freight and equipment assumption to verify:

Responsible person:

Decision date:



Funding before collection

Show when cash is due and when usable funds arrive. Replace the assumed collection date with evidence. Household cash does not disappear because it is outside the business accounts.

Funding need	Amount	Cash due date
Fuel before collection		
Recurring bills and debt cash		
Repair and downtime cash		
Owner household needs		
Less usable committed funds		
Remaining funding gap		

Weak-week condition:

Action before the shortage:

Owner:

Review date:



Whole trip decision sheet

Fictional example. Replace the figures with your records and terms. Revenue, contribution, operating result and cash are different outputs.

Input	Example	Your figure
Gross freight revenue	\$2,400	
Loaded / empty miles	800 / 200	
Total miles	1,000	
Revenue / loaded mile	\$3.00	
Revenue / total mile	\$2.40	
Fuel economy / price	8 mpg / \$4.00	
Driving fuel	125 gal / \$500	

Load identifier:

Date:

Total time for movement:

Cash needed before collection:

Payment timing and source:

Whole trip costs and result

Continue the same fictional trip. Confirm each fee’s actual base. Avoid counting labor, maintenance, depreciation or other allocated costs twice.

Item	Example	Your figure
Driving fuel	\$500	
Labor allowance	\$600	
Maintenance and tires	\$150	
Tolls and trip charges	\$60	
Dispatch / factoring	\$120 / \$72	
Total trip costs	\$1,502	
Contribution before fixed costs	\$898	
Fixed operating allocation	\$300	
Simplified result before tax	\$598	

Excluded or separately treated: income tax, unexpected repairs, additional waiting, claims and depreciation unless included in the allocation. The assumed \$200 principal cash due changes available cash from \$598 to \$398; it is not added again as an operating expense.



Diesel and weak-week check

Fuel = total miles ÷ mpg × price per gallon. The same fictional 1,000-mile trip begins with \$500 driving fuel and a \$598 simplified result.

Change	Added fuel	Revised result
\$4.00 to \$4.50 at 8 mpg	\$62.50	\$535.50
8 to 7 mpg at \$4.00	\$71.43	\$526.57
Both changes	\$142.86	\$455.14

All other example costs stay fixed. This does not model every real-world cost change or predict actual mpg.



Weekly fuel review

One truck and one consistent measurement interval.
Investigate missing receipts before judging the result.

Truck and review dates

Opening and closing odometer; total miles

Gallons and settled cost including fees

Measured mpg and price per gallon

Idle or unusual operating conditions

Variance from plan and assigned follow-up



Dispatcher interview

Use the same fictional load for each provider. Keep answers beside the proposed written scope.

Included tasks and tasks retained by carrier

Counterparty and customer acceptance checks

Equipment, driver, insurance and route review

Who approves loads and material changes

Fee percentage or amount and revenue base

Documents, billing and dispute responsibilities

Coverage when unavailable; exit and records



Monthly bookkeeping close

Agree the scope and timetable with the provider. A missing record must have an owner and an effect on the report.

Bank, credit and fuel accounts reconciled

Delivered loads matched to billing and collection

Factoring fees, reserves and advances reconciled

Equipment, loan and owner transactions reviewed

Tax professional and reporting handoffs

Reports delivered and definitions explained

Unresolved records, assigned owner and due date



Weekly cash planning

Repeat this sheet for thirteen weeks. Use supported timing and a delayed-collection scenario. This is a planning aid, not an accounting statement.

Cash movement	This week	Next week
Beginning usable cash		
Supported expected collections		
Fuel and operating payments		
Labor / owner cash needs		
Insurance and recurring bills		
Debt cash and planned taxes		
Repairs and committed equipment		
Ending usable cash		

Lowest projected cash point:

Uncertain collection and evidence:

Action, owner and deadline:



Specialized movement decision

This sheet does not authorize movement. Use current jurisdiction requirements and actual permit conditions.

Verified cargo dimensions, weight and loading

Equipment, axle, capacity and securement review

Carrier, driver and applicable coverage

Jurisdictions, verified route and clearances

Permits, travel windows and escort confirmations

Complete quote, exclusions and cash due

Material open item and carrier approval



Carrier readiness record

A task-control record for the actual operation. Receipt is distinct from review and approved release.

Legal identity and current carrier status

Operation, commodity, geography and equipment

Applicable authority and state requirements

Driver, inspection and operating-record review

Insurance evidence and open conditions

Customer acceptance and billing process

Named carrier decision-maker and unresolved holds



Owner operator activation

Adapt to the arrangement with qualified review. This sheet does not replace a lease or authorize use of a registration number.

Actual parties, arrangement and agreements

Driver, equipment and insurance review

Settlement terms and required records

Role access and operational orientation

Demonstration of changed-load and POD handoffs

Post-training supervisor and backup

Carrier-controlled release and remaining holds



Tax decision packet

Send sensitive records only through the tax professional's approved secure channel. This sheet does not determine a deduction.

Business purpose and freight the equipment serves

Purchase terms, acquisition and ready-for-use dates

Cost detail, financing and business-use evidence

Professional's applicable methods and limits

Current and later tax effects; federal and state

Purchase cash, recurring cash and weak-case plan

Professional response, unresolved items and date



Seven-day action plan

Choose one task nearest cash, safety or a pending commitment. These are your own dates and assignments, not THS response promises.

Present condition and supporting evidence

One result to complete

Named responsible person and backup

Documents or decisions still needed

Due date and check-in

Evidence that will prove completion

Unresolved issue and next action



Sources and evidence limits

Bracketed notes support factual claims. Management routines and fictional examples are original THS teaching material. Sources were retrieved October 3, 2026; S5, S9, S13, S17 and S23 were rechecked October 4, 2026. Publication, update, observation and retrieval dates differ. A missing reliable date or source limitation is stated. Check current sources and your operation's facts before acting.

S1 EIA Gasoline and Diesel Fuel Update

Weekly diesel regional series. Retrieved October 3, 2026; displayed release September 29 and observation September 28, 2026. No current pump price is reproduced. Survey benchmark, not a carrier quote.

Open official source

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Idle Reduction explanation and technologies. Retrieved October 3, 2026; reliable publication/update date not established. General practices; no equipment-specific savings percentage.

Open official source

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Final guidance published June 16, 2023; Section IV D–F. Retrieved October 3, 2026. Actual activities and control matter; this book makes no determination of THS or a reader’s legal classification.

Open official source

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S4 FHWA Oversize and Overweight Load Permits

Permits and state permit contacts. Retrieved October 3, 2026; publication/update date not established. National overview; obtain current jurisdiction and movement conditions.

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Open official source

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S6 IRS Publication 946 How To Depreciate Property

2025 tax-year edition; What Is Qualified Property, Placed in Service, special allowance and elections. Retrieved October 3, 2026. Tax-year label is not retrieval date; no reader-specific deduction determination.

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Bulletin dated March 19, 2026; registration versus compliant equipment leasing. Retrieved October 3, 2026. Not approval of an individual transaction or lease.

Open official source

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S8 49 CFR 376.12 Lease Requirements

Opening applicability and exemptions; (a)–(e), (h), (j). Retrieved October 3, 2026; displayed Title 49 current through October 1, 2026. Title currency is not this section’s amendment date. Qualified review of applicability remains necessary.

Open official source

<https://www.ecfr.gov/current/title-49/subtitle-B/chapter-III/subchapter-B/part-376/subpart-B/section-376.12>



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S9 FMCSA Fraud Alerts

Position on Aggressive Telemarketing and verification advice. Page updated September 29, 2026; retrieved October 3. Image filename dates are not verified incident dates. No individual sender is classified here. Rechecked October 4, 2026.

Open official source

<https://www.fmcsa.dot.gov/registration/fraud-alerts>

S10 FMCSA New Entrant Program

Have you heard from FMCSA; contact within 90 days and audit correspondence. Retrieved October 3, 2026; reliable page-update date not established. Legitimate contact and independent verification both matter.

Open official source

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S11 FMCSA Get Operating Authority

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Open official source

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S12 FMCSA Interstate and Intrastate Commerce Guidance

Essential character and shipper intent. Historical guidance currently posted; retrieved October 3, 2026. Page-update date not relied on. A local leg can be part of interstate commerce.

Open official source

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Open official source

<https://www.fmcsa.dot.gov/registration/commercial-drivers-license/drivers>

S14 FMCSA Safety Planner Driver Qualification Files

Section 6.1.2 and owner-operator applications. Retrieved October 3, 2026; guide date not established. Underlying current rules and operation facts control; no paper medical-card shortcut prescribed.

Open official source

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Open official source

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S16 IRS Recordkeeping

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S17 FMCSA Registration Modernization FAQs

TSP designation, acceptance and carrier final review/submission. Retrieved October 3, 2026; living page includes rollout language. Does not establish THS access, approval or a specific screen being available. Rechecked October 4, 2026.

Open official source

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S18 FMCSA Insurance Filing Requirements

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Pickup combination question; IFTA credentials and fuel trip permits. Retrieved October 3, 2026; page date not established. Texas administration, vehicle-specific applicability; not operating authority.

Open official source

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S20 TxDMV Oversize and Overweight Permits

Permit Options and General Single-Trip. Retrieved October 3, 2026; page date not established. Texas only; issued permit conditions control.

Open official source

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Open official source

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S22 FMCSA Cargo Securement Rules

General and commodity-specific rules. Retrieved October 3, 2026; page date not relied on. Applicable requirements and actual cargo/configuration control.

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S24 FMCSA What Is the New Entrant Program

18-month period and audit within 12 months after operations start. Page updated May 22, 2023; retrieved October 3, 2026. Does not promise a reader's audit appointment or outcome.

Open official source

<https://www.fmcsa.dot.gov/faq/what-new-entrant-program>



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When to get an EIN; application authorization and free IRS issuance. Retrieved October 3, 2026; page date not established. Private assistance fees and government fees are distinct.

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<https://www.irs.gov/businesses/small-businesses-self-employed/get-an-employer-identification-number>

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CDL owner-operator driver/employer roles; C/TPA and consent. Retrieved October 3, 2026; page date not established. Described roles differ by arrangement; C/TPA designation is not Motus TSP designation.

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Published August 7, 2026; Key Elements of Proposed Rulemaking. Retrieved October 3. Proposal is not proof of final-rule adoption.

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