Freight Broker/Agent Training
150 hours

Course Overview/Description

Learn the skills you need to be a successful Freight Broker/Agent. This is a growing industry of licensed individuals or corporations that help make a shipper and an authorized motor carrier successful in the transporting of freight. This online certificate program is offered in partnership with major colleges, universities, and other accredited education providers.

Job Opportunity and Resource Friday!

Placement Opportunity: All Brook graduates have the opportunity to meet and discuss agent positions with freight brokerages.

Each Friday of the program, Brooke Transportation Training Solutions hosts Resource Friday exclusively for their graduates. BTTS is the only broker training school offering this excellent resource.

Graduates will be inspired, meet potential employers, and network with complementary businesses. Inspirational speakers motivate you to start your new career strong. The best businesses and brokers in the industry talk with graduates about the choice of starting their own brokerage, working as an agent for another firm, and other job opportunities. Complementary businesses also come to Resource Friday to meet the new graduates and talk through how each can benefit the other in business success.

Become a part of the exciting trucking, freight logistics, and transportation industries as a licensed freight broker or as a freight broker agent. From licensing to operations, to sales and marketing, you'll learn the basics of how to run a freight brokerage or agency.

Entrepreneur magazine has rated the freight brokerage business as one of the top home-based businesses to own, and a recent Wall Street Journal article cited freight brokering and logistics as the largest growing sector of the transportation industry. Written by freight brokerage specialists, the Freight Broker/Agent Training course will provide you with the knowledge and resources needed to break into the $400 billion-plus industry.

Freight broker professionals are in demand. No matter the state of the economy, goods will always need to be shipped. A motivated and disciplined freight broker or freight agent who has received the proper training can build up his or her business into a six-
figure earning potential. It’s an ideal home business for a self-starter who enjoys fast-paced work.

Upon registering, you’re given an initial six months to complete the program. Should you need more time, you may request a six-month extension at no additional charge.

**Course Objectives**

Upon successful completion of the Freight Broker/Freight Agent Training Program, you’ll:

- Understand the process of freight brokering from start to finish
- Have the tools needed to be successful as a freight broker or freight agent
- Learn the basics of day-to-day operations of a brokerage or agency
- Use techniques such as prospecting, sales and marketing, rating, and negotiations
- Be able to manage the shipment from origin to destination
- Gain valuable industry resources

**Course Outline**

I. **Freight Broker Basics**
   a. Overview of the Job
      i. What is a Freight Broker?
      ii. Requirements to Become a Freight Broker
      iii. What is a Freight Broker Agent?
      iv. Requirements of Becoming a Freight Agent
      v. Why do Shippers use Freight Brokers/Agents?
   b. Industry Overview
      i. Overview of the Transportation Industry
      ii. Brief History of Surface Transportation and Freight Brokering
      iii. Industry Potential and Trends
   c. Broker Laws & Requirements by the FMCSA
      i. Legalities of Broker/Brokerage Services
      ii. Non-Brokerage Services
      iii. Laws Regarding Record Keeping for Brokers
      iv. Laws Regarding Misrepresentation
      v. Broker Advertising Liability
      vi. Rebating and Compensation
      vii. Duties
      viii. Double Brokering Legalities
      ix. Laws regarding Accounting Expenses

II. **Marketing and Sales**
a. More on Marketing
   i. Market Niches
   ii. Market Trends
   iii. Competition
   iv. Networking
   v. Promotions
   vi. Your Marketing Dollars
b. Customer Relations and Customer Profile
   i. Qualifying the Prospect
   ii. Determining Needs
   iii. Features and Benefits
   iv. Managing Objections
   v. Personality Types
   vi. Building Trust
   vii. Sales Process and Growth
c. Overcoming Challenges
   i. Shipper Situations
   ii. Carrier Situations
   iii. Consignee Situations
d. Success and the Broker/Agent
   i. Why Become a Broker or Agent?
   ii. Benefits and Opportunities
   iii. Traits of a Successful Broker/Agent
   iv. Goal Setting
   v. Developing a Plan
   vi. Qualities of Success

III. Getting Started
a. Starting Your Business
   i. Your Business Name
   ii. Setting Up Your Business
   iii. Filing for Your Broker Operating Authority
   iv. Filing for Your Surety Bond
   v. Obtaining Your Process Agents
b. The Next Steps
   i. Ensure Cash Flow Resources
   ii. Business Bank Account
   iii. Setting up your Office
      1. IT Specs
      2. Office Basics
      3. Transportation Software and Other Software Considerations
c. Preparing Your Initial Marketing Materials
   i. Determining Your Business Identity
ii. Decide on Initial Niche Target Markets
iii. Formulate Initial Website
iv. Examples of Initial Marketing Materials

IV. **Shipper/Carrier Marketing and Dynamics**
   a. Setting Up Your Shipper Packet
   b. Setting Up Your Carrier Packet
   c. Setting Your Rates
      i. Determining Competitive Rates
      ii. Resources for Rating
      iii. Rate Variables
      iv. Types of Rate Matrices
      v. Fuel and Surcharges
      vi. Accessorial Fees
   d. Finding Your Shippers

V. **Load Dynamics/Operations**
   a. Building the Load
      i. Load Data
      ii. Special Instructions
      iii. Rate Verification with Customer
   b. Matching the Carrier
      i. Load Posting
      ii. When to Post and What to Post
      iii. Checking Authority and Safety
      iv. Insurance Verification
      v. Carrier Contracts
   c. The Process Continued
      i. Rate Confirmation
      ii. Carrier Pick-up and Delivery
      iii. Dispatching
      iv. Tracking and Verification
   d. Carrier Relations (Your Carrier Profile)

VI. **Conclusion and Appendices**
   a. Conclusion
   b. Financial Management
      i. Staffing
      ii. Cash Flow
      iii. Auditing and Billing
      iv. Setting up Invoices for Payment
      v. Other Brokerage Accounting
c. Insurance Claims
   i. Types of Freight Claims
   ii. Claim Forms
   iii. Claim Procedures
   iv. Claims Laws

Prerequisites/Audience

There are no specific prerequisites for this program.

PC Requirements/Materials

This program is compatible with the Windows Vista Operating System.

Adobe Flash Player and Adobe Acrobat Reader are required for this course.

Go to http://get.adobe.com/reader/ to download the Acrobat Reader.
Go to http://get.adobe.com/flashplayer/ to download the Flash Player.

This course can be taken on either a Mac or a PC. All materials for this program are available online.

Instructor Bio

**Jan Roach** graduated with a B.S. from Baylor University in 1982. She entered the transportation field in 1995 when she became a partner in a freight brokerage operation. She has over 10 years of experience in running a brokerage/agency including sales, marketing, accounting and claims, and day-to-day operations inside of a brokerage. She has also provided training in the industry since 2001.

**Jeff Roach** graduated with a B.S. from Abilene Christian University in 1986 and has been in the transportation and freight brokerage industry ever since. He first worked as a traffic manager. He then went to work for a major less-than-truckload carrier, whose philosophy was that you needed to experience every phase of the job before achieving a management position. He started out working nights on the freight docks, supervising the loading and unloading of shipments. He then worked as an inside account sales representative, and was soon promoted to outside sales for national accounts. He then obtained a position with a major truckload carrier with an air freight division, where he was the vice-president of national accounts.
In 1995 he began operating his own freight brokerage, which he grew into a multi-million dollar business. He began developing freight broker/agent courses in 2001.

Student Review

"When I thought of an online course, my first thought was that it will never be as good as a live class, until I decided to become a freight broker. I looked through a lot of online courses and thought this one was worth the price. I finally took the Gatlin Freight Broker course and since then, I couldn't have picked a better way to invest my money. It's not only the course itself, but Jeff Roach is also the best instructor that I've had.

The way he teaches is incredible. There is no way that the material cannot be understood. It is like having a live class in your home. The course covers every detail, and I've never had a doubt or question after each module. The narrative learning course is fantastic, and my favorite part is the fact that I only have to listen. I highly recommend the course for those who want to understand the freight broker industry."

— J.V., Spring 2007