

Same-Day Client Onboarding Checklist

From handshake to first booked load — in 24 hours.

Within 1 Hour

- Send Dispatcher–Carrier Agreement (DocuSign)
- Send Letter of Authorization (LOA)
- Send Intake Form
- Add carrier to CRM

Within 4 Hours

- Collect MC Authority (MCS-150)
- Collect W-9
- Collect Certificate of Insurance (\$1M auto / \$100K cargo)
- Collect voided check / factoring NOA
- Verify MC active on SAFER
- Save full packet to shared drive

Within 24 Hours

- Submit packet to your top 10 brokers
- Set up communication preferences with driver
- Send welcome email with your daily schedule
- Book first available load — even break-even — to test workflow
- Schedule a Day-7 check-in call