EXCELSIOR COLLEGE

7 Columbia Circle, Albany, NY 12203-5159
Phone: **518.608.8211** | Toll Free: **888.647.2388** | Fax: 518.464.8777
WWW.EXCELSIOR.EDU/CPD

CENTER FOR PROFESSIONAL DEVELOPMENT

FREIGHT BROKER / AGENT TRAINING

150 Hours/12 Months/Instructor-Facilitated
Course Code: **CPD064** || Course Cost: **$1695**

OVERVIEW

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 domestic freight brokerage or agency in the United States.

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 Online Training Program will provide you with the knowledge and resources needed to break into the $400 billion-plus shipping 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.

Job Opportunity and Resource Friday!

Placement Opportunity: All Brooke 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.

OBJECTIVES

Upon completion of this program, you'll be able to:

- 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 a shipment from origin to destination
- Gain valuable industry resources

OUTLINE

I. Freight Broker Basics
- Overview of the Job
  - What is a Freight Broker?
  - Requirements to Become a Freight Broker
  - What is a Freight Broker Agent?
  - Requirements of Becoming a Freight Agent
  - Why do Shippers Use Freight Brokers/Agents?
- Industry Overview
  - Overview of the Transportation Industry
  - Brief History of Surface Transportation and Freight Brokering
  - Industry Potential and Trends
- Broker Laws and Requirements by the FMCSA
  - Legalities of Broker/Brokerage Services
  - Non-brokerage Services
  - Laws Regarding Record Keeping for Brokers
  - Laws Regarding Misrepresentation
  - Broker Advertising Liability
  - Rebating and Compensation
  - Duties
  - Double Brokering Legalities
  - Laws Regarding Accounting Expenses

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

Outlines are subject to change.
For more information, visit our Web site at: **www.excelsior.edu/CPD**,
email **CPD@excelsior.edu**, or call: **888-647-2388 ext 11-8211**

- Qualities of Success

III. Getting Started
- Starting Your Business
  - Your Business Name
  - Setting Up Your Business
  - Filing for Your Broker Operating Authority
  - Filing for Your Surety Bond
  - Obtaining Your Process Agents
- The Next Steps
  - Ensure Cash Flow Resources
  - Business Bank Account
  - Setting Up Your Office
    - IT Specs
    - Office Basics
    - Transportation Software and Other Software Considerations
- Preparing Your Initial Marketing Materials
  - Determining Your Business Identity
  - Decide on Initial Niche Target Markets
  - Formulate Initial Web Site
  - Examples of Initial Marketing Materials

IV. Shipper/Carrier Marketing and Dynamics
- Setting Up Your Shipper Packet
- Setting Up Your Carrier Packet
- Setting Your Rates
  - Determining Competitive Rates
  - Resources for Rating
  - Rate Variables
  - Types of Rate Matrices
  - Fuel and Surcharges
  - Accessorial Fees
- Finding Your Shippers

V. Load Dynamics and Operations
- Building the Load
  - Load Data
  - Special Instructions
  - Rate Verification With Customer
- Matching the Carrier
  - Load Posting
  - When to Post and What to Post
  - Checking Authority and Safety
  - Insurance Verification
  - Carrier Contracts
- The Process Continued
  - Rate Confirmation
  - Carrier Pick-up and Delivery
  - Dispatching

        - Tracking and Verification
    - Carrier Relations (Your Carrier Profile)

VI. Conclusion and Appendices
    - Conclusion
    - Financial Management
        - Staffing
        - Cash Flow
        - Auditing and Billing
        - Setting Up Invoices for Payment
        - Other Brokerage Accounting
    - Insurance Claims
        - Types of Freight Claims
        - Claim Forms
        - Claim Procedures
        - Claims Laws

COMPUTER REQUIREMENTS

This program is compatible with Windows XP/Vista/7 and IE 7 or later browsers. Adobe Flash Player and Adobe Acrobat Reader are required, as is an Internet connection (high-speed recommended).

INSTRUCTOR BIOS

Jan Roach graduated with 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 training programs in 2001.