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# The Direct Shipper Starter Kit

The working tools from the dytch guide "How to Find Direct Shippers to Haul Freight For": the readiness check, the lane-fit worksheet, a fillable prospect tracker, the packet checklist, and a first-contact email script. Print it and put it to work.

## 1. The readiness check

Shippers hand freight to carriers they believe will still be there next quarter. Before you prospect, these five should be solid:

- [ ] Active authority and insurance that meet the shipper's stated requirements
- [ ] The ability to run the lane consistently, even when a truck is in the shop
- [ ] Cash reserves to float fuel and fixed costs through invoice payment terms
- [ ] Clean paperwork: agreements, PODs and invoices that never need chasing
- [ ] A plan for the return leg, so the round trip makes money too

Two or more shaky? Strengthen them on broker freight first. A direct relationship that collapses early costs more than the loads were worth.

## 2. The lane-fit worksheet

Fill this in before any list-building. It is your definition of a good prospect, and your pitch in four lines.

**Equipment (type, length, temp range):**

**Lanes I can run profitably, return leg included:**

**Loads per week I can genuinely commit:**

**My minimum rate per lane, deadhead included:**

# 3. The prospect tracker

Keep the list short enough to research every name. Twenty companies you actually understand beat two hundred scraped rows. Qualify each with five questions: What do they ship and does it fit your equipment? How often? Does the lane pay your minimum round trip? Who owns the transportation decision? Do they use outside carriers at all?

| Company + location | What they ship / lane fit | Decision maker + contact | Next follow-up | Status |
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Status ideas: New / Researched / Contacted / Packet sent / In their system / Won / Not now. A row with no next follow-up date is a dead lead. Be honest with it.

# 4. The carrier packet checklist

When a shipping manager asks you to send your information, what lands in the next hour is your company as far as they know it. Keep one bookmarked PDF current, in this order:

1. **Service profile (1 page)**
   Who you serve, equipment, named lanes, proof points, contact. Leave rates off it. The packet sells the conversation, not the number.
2. **Authority letter**
   Legal name, DOT and MC numbers, active status.
3. **Certificate of insurance**
   Auto liability and cargo, with your agent's contact.
4. **Safety snapshot**
   Your inspection history, summarized honestly. They can look you up regardless.
5. **References**
   Two or three names who will actually answer. Ask their permission before listing them, and warn them a call may come.
6. **Standard terms**
   Payment terms, factoring notice if you use one, detention and accessorials, stated plainly.
7. **W-9**
   Include when a real prospect is setting you up, not in the first cold send.

## Send it deliberately

Build the packet once, but send it after a real conversation, to an address you have verified belongs to the right person. It is your company's paperwork. Treat it that way.

## Three packet killers

A stale certificate of insurance. A generic blast that reads like it went to five hundred companies. Overclaiming: if a number cannot survive a check, leave it out.

# 5. The first-contact script

Adapt this after a real conversation or as a first email. Every bracket is a placeholder: fill it with something true about your operation, or delete the line.

```
Subject: [Your company] - [equipment] capacity for your [lane] freight

Hi [name],

We run [equipment] out of [home base]. [The specific commitment you can
truly make, e.g. "I have one truck open on [lane] three days a week"].
[One sentence of true proof, if you have it: an on-time record, years
running, a reference they can call. If not, delete this line.]

I am not asking you to move freight today. I would like to get set up in
your carrier system so you have a vetted backup on [lane] next time your
regular capacity falls short.

My packet is attached: authority, insurance, references and terms in one
PDF, one page summary up front.

Worth a short conversation this week? [Two specific times you can offer.]

[Name], [company], [phone or email]
```

## If this is a cold sales email

US CAN-SPAM rules apply to B2B outreach too: honest subject line, your valid physical postal address in the footer, and a clear way to opt out, honored within 10 business days. "If this is not relevant, reply 'no thanks' and I will not follow up" works, as long as you mean it. Other regions have their own rules; check the ones that apply to you.

## An example follow-up cadence

Day 1: send the packet soon after the conversation. Day 3-5: one short follow-up referencing it. Weeks 2-4: one or two touches with something useful, like a capacity update on their lane. Then one last check-in. Stop on a clear no, an opt-out, or evident lack of fit, and log it in the tracker.

**About dytch**

dytch builds lead-generation systems and websites for trucking carriers.
This kit is a free resource from our direct shippers guide.
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