

**EQUITABLE SOLUTIONS LLC**

# Dispatcher Daily Workflow Planner

Today Board, Lane Plan, call list, booking checklist, and paperwork tracking.

Digital Product | Website-ready PDF product

Created for the Equitable Solutions LLC dispatching website.

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This product is educational material, not legal, tax, financial, or insurance advice.

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## How to use this product

Use this PDF as a working business tool. Read the training pages first, then copy the checklists, scripts, worksheets, and templates into your own dispatch workflow. Customize the words to your business voice before using them with carriers.

## Planner overview

This planner turns dispatch work into a daily operating system. It is designed around the Today Board, Lane Plan, call list, booking checklist, paperwork tracker, and end-of-day closeout.

- Use the Today Board first every morning.
- Build a Lane Plan before random load searching.
- Keep a broker call list with notes.
- Use the booking checklist before committing.
- Close each day by updating paperwork and tomorrow empty trucks.

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## Page 1 - Today Board template

Truck/Carrier	Location	Ready time	Hours/status	Target lane	Priority

- [ ] Which truck needs a load first?
- [ ] Which truck has the tightest appointment issue?
- [ ] Which truck is empty tomorrow and needs pre-planning?
- [ ] Which carrier is missing paperwork?

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## Page 2 - Lane Plan worksheet

Build the lane before calling brokers. A dispatcher who knows the lane negotiates better.

Lane detail	Answer
Origin city/state	
Destination preference	
Max deadhead	
Minimum RPM or flat rate	
No-go areas	
Fuel/toll concerns	
Backhaul/reload options	
Weather concern	
Best pickup window	
Best delivery window	

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### Page 3 - Broker call list

Time	Broker	Load #	Lane	Posted rate	Asked rate	Result	Follow-up

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# Page 4 - Load option comparison

Compare loads side-by-side before presenting them to the carrier. Do not send a weak load unless you explain why it is only a backup option.

Option	Rate	Miles	RPM	Deadhead	Pickup	Delivery	Risk notes
1							
2							
3							
4							



## Page 5 - Booking checklist

- Broker confirmed load is available.
- Pickup and delivery windows are workable.
- Carrier approved rate and terms in writing.
- Commodity and weight are acceptable.
- Broker sent rate confirmation.
- Carrier name, MC, rate, pickup, and delivery are correct.
- Accessorial rules are understood.
- Driver has dispatch details.
- Tracking method is confirmed.
- Paperwork folder is created.

# Page 6 - Tracking and paperwork tracker

Load #	Pickup arrived	Loaded	In transit update	Delivered	POD received	Docs sent	Invoice status

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## Page 7 - End-of-day closeout

- Every active load has a next-step note.
- Every driver knows next appointment or update time.
- Every POD requested or saved.
- Tomorrow empty trucks identified.
- Tomorrow lane searches saved.
- Carrier follow-ups scheduled.
- Invoices and fee tracking updated.
- Desk and CRM are ready for the next morning.

### Closeout rule

Tomorrow starts tonight. The dispatcher who pre-plans tomorrow before logging off usually beats the dispatcher who starts from zero in the morning.

## Website copy for this product

Dispatcher Daily Workflow Planner - Today Board, Lane Plan, broker call list, booking checklist, tracking log, paperwork tracker, and end-of-day closeout pages for keeping dispatch work organized from load search to invoice support.

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## Appendix

Source note: This product was drafted with reference to FMCSA final guidance on broker and bona fide agent definitions published June 16, 2023, and FMCSA broker registration guidance. Verify current requirements before publishing legal claims or training staff.

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