

How to Start Your Own Trucking Fleet

Quick Start Checklist

The following checklist will give you an introduction to some of the key things you will need to accomplish in order to become a successful fleet owner. You will need additional training, information and resources on an ongoing basis, but this information will help you get started. Additional information and other resources are available at

www.ldsewell.com

- Obtain and complete our How To Become An Independent Owner Operator Quick Start Checklist – This checklist continues and builds from that information.
- Review and Audit your operation to be certain you have all mandatory requirements met and that you have adequate additional risk management measures in place to your own satisfaction, to accommodate your fleet start up and expansion plans.
- Select and obtain a suitable business location to accommodate expansion plans.
- Set up your office – desks, chairs, copier, fax, all other items necessary to operate.
- Update any regulatory authorities of your new address and intended expansion as applicable.
- Decide on equipment types and how you will obtain your equipment.
- Develop a systematic maintenance program to keep your equipment up and to meet all related regulatory requirements (consider how you will handle on the road breakdowns and repairs too).
- Consider what you will and won't haul, where you will operate, and how (short haul, regional, long haul, OTR, Specialized Niche such as boat hauling etc.).
- Decide what drivers to recruit and method of affiliation (employees, owner operators, lease purchase etc.).
- If you are going to have lease drivers or offer a lease purchase program ***be warned*** you will need to become extremely educated in the intricacies of doing this, and consult a knowledgeable trucking attorney to review, everything including your agreements and all methods related to your program before implementation and periodically from then on for the duration.
- Be certain your staff is well trained on dealing with your drivers and that all operations staff and others having responsibility and or authority to direct the activities of drivers know and fully understand what they can and cannot direct them to do both legally and as a matter of your own policies within the legal confines (example; treating and directing leased owner operators like employees may result in the government reclassifying them as employees and all kinds of fines, penalties, liability and potential lawsuits may occur as a result - also directing ANY driver [employee or leased] to run illegally, over hours, by pass scales etc. may result in severe consequences including criminal prosecution in some cases).

- ❑ Decide on your dispatch systems (including software and hardware), obtain it and get in depth training before you begin expansion.
- ❑ Develop and have in place all internal management controls and filing systems for all areas of your operation from hiring, onboarding, dispatch/operations, safety, risk management, compliance, personnel/HR, payroll, accounting, bookkeeping, accounts receivable (your billing department), accounts payable, shop/maintenance, facilities management and any other area of your company.
- ❑ Determine your recruiting methods and tactics and what specifically you will offer your drivers.
- ❑ Decide what type operation you are going to build and select applicable methods to do so, then develop your fleet start up, operations and expansion plans, policies and procedures in writing and write your new business plan.
- ❑ Review all current regulatory and legal requirements, issues and concerns and be certain you have considered and addressed all critical areas and issues and make all relevant and necessary arrangements and adjustments to address each item concerned.
- ❑ Contact your liability insurance carrier and any other insurance companies you may have and as may be concerned and consult with them on your plans and be sure you obtain any additional coverage and have adequate coverage in place in all areas such as applicable as general liability etc.) and that you are clear on costs, methods and criteria (driver minimum hiring criteria, workers comp, general liability etc.).
- ❑ If you are going to have employees you need to investigate and become familiar with work comp requirements and record keeping and determine whether it applies to you yet or not, and you need to be aware of all other personnel/HR issues (which are many and complex).
- ❑ Consider consulting with a business attorney who specializes in trucking and review your plans if needed or desired.

Get the information, training, resources and ongoing support you need before you start your fleet. Then design it and build it right from the ground up and you will be successful and be able to enjoy your business in the same industry where most others will fail, and many others will continuously struggle and be stressed out because they are not prepared.

If you would like additional help, information, training and resources you can find it at www.ldsewell.com. I hope you found this check list to be useful and if you have any questions or recommendations you can contact me at ldsewell@ldsewell.com