



BROKER/ MENTOR EXPECTATIONS

Congratulations on receiving a new hire to aid you on your team. During this process you have the opportunity to help positively impact their career growth

A mentor is a teacher, an advisor, an advocate, and a confidant. He or she should be positive and well-seasoned enough to understand the dynamics of power and politics in the organization and be willing to share this knowledge with one or more new hires.

The onboarding phase shall consist of a new hire initial 4 weeks. During these first 30 days, these are expectations which you can conduct:

- Introduce the new hire to your entire team.
- Collaborating early morning to set daily/weekly tasks for the new hire to complete.
- Sharing resources such as giving new hires access to all team pages, logins, etc.
- Cover and complete the Ops Competency Checklist (provided).

At the end of **Week 3**, an informal check-in will take place between the training team, the broker/mentor and the mentee.

At the end of **Week 4**, New hires (mentees) will meet with their individual managers to discuss checklist items including needs and areas of concern. The training team will meet with all in hires in a group setting with training team as well.

At the end of **Week 6**, an informal check-in will take place between the training team, the broker/mentor and the mentee.

Here are some guidelines the new hire will expect to know In weeks 5-8:

- Commodity requirements specific: How well does the Mentee know what questions to ask, when to advise carriers to have the right equipment. E.g., straps vs chains, chocks, pipe stakes, ramps, delivering to a RIG or ROW? _____
- Equipment knowledge: How well versed is the Mentee in quoting different trailer types that aren't flatbed, reefer or van? _____
- Confident in utilizing SSRS tools - Hybrid delivery List and Carrier Search _____
- Is the Mentee confident in using ITS and DAT _____
- How to put out common fires: Does the Mentee know the procedure of how to deal with rejected material? How to recover cover loads? Reporting stolen loads? When dealing with double brokered loads – how to check if the payment has gone through, and when to notify the customer?
- Tracking and tracing – How familiar are the Mentee with this tool? Is Mentee able to update customers coherently? _____



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- Billing Issues – Does the Mentee understand the important procedures such as Rate sheets, Blank BOLs, Rate adjustments to the customer or carrier? _____
- Claims SOP – Does the Mentee know the standard procedures and guidelines, knowing what to do if there is an accident, claim, or fatality? Or how to determine if the customer received the material or rejected it? _____
- Taking the lead while the broker is on vacation – Is the Mentee confident enough to run this book, ask for help from the manager to quote loads, updating customers, etc.? _____
- Time Management – Does the Mentee keep a good time schedule? Does it need retracted? Does the Mentee have an opportunity to dabble in mini afternoon sales sessions? _____
- Soft intro into sales: What progress has the Mentee shown as they get ready for sales: making a rough draft lead list, making sales calls – How to word emails to prospects after those initial calls, what to attach, etc. How to utilize the CRM as a tool to stay organized, breakdown of where to look and where not to look? _____

STANDARD PROCEDURES FOR WHEN A BROKER IS NOT SHOWING SIGNS OF PROGRESS IN AN OPERATIONS ROLE.

In their first 30 days, when a new hire is not showing progress or having difficulty completing basic tasks in the operations role the following steps should be followed:

- Notify the training team immediately.
 - Be ready to discuss in detail the issues or concerns with the new hire.
- The training team will meet with the new hire in-person or remotely to assess the situation. The new hire's manager will also be notified at this point.
- The training team will observe the new hire's performance on the team.
- Based on the findings, the new hire will receive daily goals and an appointed time to complete them. These goals will be evaluated by the training team.
- If the new hire is not showing improvement, the Manager will be notified, and a course of action will take place at the Manager's discretion.

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