

CARRIERS, OWNER-OPERATORS, DISPATCHERS, SMALL FLEETS, AND FREIGHT OPERATIONS BUYERS

Load Board Evaluation & Trial Toolkit

Replace feature-list shopping with a bounded trial record that shows whether a board fits the freight, people, controls, and total cost of the operation.

Use repeat live searches, saved commercial terms, an end-to-end workflow test, identity and security review, and a dated owner decision. A completed checklist means the trial evidence is organized. It does not rank providers, guarantee freight, certify safety or compliance, or make the purchasing decision.

HOW TO USE IT

1. Read the gates

2. Print the worksheet

3. Record actual results

Reviewed July 20, 2026 | Complete web version: loadladder.com/resources/load-board-evaluation-toolkit

WORKFLOW 1 OF 6

Gate 1 - Define the operating decision

State the exact use, people, freight, actions, and deal-breakers before comparing features.

[]	Named use Record who searches, sees contact information, negotiates, approves, and owns the account.
[]	Equipment and markets List actual equipment, markets, radius, dates, days, and operating constraints.
[]	Required actions List needed search, alert, contact, handoff, mobile, document, export, and integration tasks.
[]	Stop conditions Define the coverage, cost, terms, control, security, or identity gaps that end the trial.

WORKFLOW 2 OF 6

Gate 2 - Measure usable freight

A headline count is not useful supply for one truck or team. Preserve repeatable search evidence.

[]	Repeat searches Use the same equipment, lane or radius, pickup dates, and times; record total and usable results.
[]	Freshness Recheck a sample and record how covered, changed, removed, or expired postings behave.
[]	Duplicates and fields Count duplicates and missing rate, location, date, equipment, source, contact, or identifier data.
[]	Source access Record whose freight is shown and the contact, booking, caching, reuse, and redistribution boundaries.

WORKFLOW 3 OF 6

Gate 3 - Capture commercial terms

Save the current offer and accepted version before providing payment information or starting paid access.

[]	All-in cost Record subscription, seat, contact, transaction, setup, integration, add-on, support, and overage charges.
[]	Trial boundary Record included access, payment requirement, exact end time, post-trial price, and access changes.
[]	Renewal Record cadence, automatic renewal, notices, promotions, price changes, taxes, and commitments.
[]	Cancellation and export Test the route and save timing, confirmation, refunds, final access, export, and retention terms.

WORKFLOW 4 OF 6

Gate 4 - Test the actual workflow

Use realistic non-sensitive trial data without contacting, negotiating, or booking outside carrier authority.

[]	Roles and carrier control Test unique users, role limits, contact authority, final approval, revocation, and stops.
[]	Search handoff Test saved searches, alerts, notes, comparison, assignment, acknowledgement, mobile use, and change handling.
[]	Documents and integrations Test only the needed export or handoff without sharing production credentials or assuming logo-level access.
[]	Recovery and support Record routes for login, data, freight, billing, security, permission, export, and cancellation issues.

WORKFLOW 5 OF 6

Gate 5 - Review identity and security

A load board does not replace current company, authority, contact, insurance, or transaction review.

[]	Independent checks Preserve source identity and compare legal name, USDOT or docket data, domains, phones, and changes.
[]	Fraud stops Stop on mismatched identity, rushed off-platform instructions, credential requests, pickup substitutions, or payment changes.
[]	Account protection Review MFA, unique accounts, role scope, admin access, sessions, alerts, removal, history, and reporting.
[]	Data boundaries Review collected account, search, location, contact, document, and usage data plus access, retention, export, and deletion.

WORKFLOW 6 OF 6

Gate 6 - Make and revisit the decision

Preserve the trial, separate observations from preferences, and let the authorized carrier or buyer decide.

[]	Baseline comparison Compare usable opportunities, time, stale or duplicate exposure, rework, failures, support, and total cost.
[]	Facts and preferences Separate observed results and written terms from interface preference, claims, reviews, and assumptions.
[]	Decision record Record keep, replace, extend, or cancel; owner; date; conditions; users; permissions; cost; and deadline.
[]	Revalidation Recheck freight, price, renewal, access, roles, security, support, exports, and value before renewal or major change.

PRINT LOAD BOARD TRIAL RECORD

Preserve the original estimate or review. Add actual results separately so the decision process can improve.

Field	Working value
Provider / plan / trial dates	_____
Decision owner / users / roles	_____
Equipment / lanes / radius / dates	_____
Search sample times	_____
Total / usable / stale / duplicate results	_____
Missing fields / source boundaries	_____
Subscription / seat / add-on costs	_____
Renewal / cancel / refund / export	_____
Carrier permissions / approval stops	_____
Workflow / alerts / mobile / handoff	_____
MFA / access / fraud / support review	_____
Baseline comparison	_____
Keep / replace / extend / cancel	_____
Conditions / next review date	_____

FINAL REVIEW

☐	Relevant freight verified through repeat live searches
☐	Freshness, duplicates, missing fields, and source boundaries sampled
☐	All charges, trial, renewal, cancellation, refund, and export terms saved
☐	Carrier authorization and real search-to-handoff workflow tested
☐	Identity, fraud-stop, MFA, role, revocation, and data controls reviewed
☐	Dated keep, replace, extend, or cancel decision recorded by the authorized owner

SOURCES AND BOUNDARIES

Use current authoritative records

These links are starting points for current official information. Requirements and records can change. This resource is not legal, tax, insurance, accounting, safety, or financial advice. It does not replace source terms, qualified professional review, carrier approval, or a counterparty's current requirements.

FMCSA Broker and Carrier Fraud and Identity Theft	https://www.fmcsa.dot.gov/mission/help/broker-and-carrier-fraud-and-identity-theft
FMCSA SAFER Company Snapshot	https://safer.fmcsa.dot.gov/CompanySnapshot.aspx
FTC Free Trials, Auto-Renewals, and Subscriptions	https://consumer.ftc.gov/articles/getting-and-out-free-trials-auto-renewals-and-negative-option-subscriptions
NIST CSF 2.0 Small Business Quick-Start Guide	https://www.nist.gov/publications/nist-cybersecurity-framework-20-small-business-quick-start-guide
NIST Multi-Factor Authentication for Small Business	https://www.nist.gov/itl/smallbusinesscyber/guidance-topic/multi-factor-authentication

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