

Score your accounts

1 Last month, split three ways

The share in the last column tells you how much of your margin is priced by someone else.

Where it came from	Revenue	Share of total	Where you want it
Broker trips			
Facility contracts			
Private pay			

2 Account scorecard

Fill this in before the next rate conversation. Profit per trip needs your cost per mile from the Fleet and tools sheet. Expect the revenue ranking and the profit ranking to disagree. Paid against expected: deposits against the rate card plus extras owed.

Account	Trips / week	Revenue	Profit per trip	Denial rate	Days to payment	Paid against expected
Biggest by revenue			Best by profit per trip			

3 Facility targets

Start with facilities you already serve, whether on broker trips or your own. You are at their door several times a week, which is the advantage. Bring your on-time performance.

Facility	Trips there now	Who owns transport	Next step, and by when

Accounts going quiet & private pay

4 Accounts going quiet

An account rarely tells you it moved its trips elsewhere; the calls just get fewer. Set each account's trips this week against its normal week, and call the week it drops, while the reason is still recent.

Account	Normal week	This week	Called? Who, when, and what they said

5 Private pay readiness

It stays small because of plumbing, not demand. A few things fix it, and none of them are hard. Set terms when the account opens, not once a balance has built up.

What is needed	In place?	If not, what it takes
A published rate, built from cost per mile and your margin floor		
A way to take payment without cash		
Who can quote it without calling you		
Facility terms: card or bank account on file, charged weekly		
Facility payments by direct deposit, not checks		

6 Score this component

Largest contract as a share of revenue		Score this component (1-10)	
The one thing to fix first			