



FREE RESOURCE · FOR FREIGHT BROKERS

Is Your TMS Helping You Scale — or Holding You Back?

Use this 50-point checklist to evaluate your current TMS, compare potential providers, and uncover missing features, hidden costs, and the manual processes quietly eating your margin.

50

criteria

12

categories

15 min

to complete

Score your current system honestly. Then score any vendor you demo, including us.
A tool you can only use to sell yourself is not a tool worth publishing.

Published by Polt.ai · The AI-native TMS built by freight brokers

HOW TO USE THIS

Score it honestly. The gaps are the point.

Work through all 50 criteria and tick every one your current system does today, natively, without a workaround, a spreadsheet, or a second subscription. Be strict. "We have a process for that" is not the same as "the software does that."

Then total your score at the end. What matters is not the number itself, it is which categories come up empty. Those are the places your team is absorbing work the software should be doing, and they are almost always where your margin is going.

If you are evaluating new providers, print a copy for each vendor and score them during the demo. Ask them to show you the feature, not describe it. Anything a vendor calls "on the roadmap" scores as a zero.

Reading your score

40 to 50	Your platform is genuinely modern. Focus on adoption and process.
25 to 39	You have a capable core with real gaps. You are paying for the gaps in labor.
10 to 24	You are running a stack, not a system. Manual work is subsidizing your software.
Under 10	Your TMS is a database. Your team is the automation.

LOAD MANAGEMENT

- ☐ 01 Loads can be created automatically from an email, PDF, or EDI tender, with no manual entry
- ☐ 02 A single load record carries the shipper, carrier, rate, stops, and documents together
- ☐ 03 Recurring or template loads can be duplicated in one click
- ☐ 04 Rate confirmations generate and send automatically
- ☐ 05 Load status updates without anyone retyping information into a second system

TRACKING AND VISIBILITY

- ☐ 06 Tracking is native to the platform, not a paid third-party add-on
- ☐ 07 Location updates arrive automatically, without a broker placing a check call
- ☐ 08 Predictive ETAs flag a late load before the customer notices
- ☐ 09 Customers can view live status without emailing you for an update
- ☐ 10 Exceptions and delays surface proactively instead of being discovered

CARRIER MANAGEMENT

- ☐ 11 Carrier authority and operating status are verified automatically
- ☐ 12 Insurance certificates are validated and monitored for expiration
- ☐ 13 Carrier onboarding is a repeatable workflow, not an email chain
- ☐ 14 Carrier performance history is visible at the moment you assign a load
- ☐ 15 Preferred and restricted carrier lists are enforced by the system

FRAUD PREVENTION

- ☐ 16 Double-broking signals are screened automatically on every load
- ☐ 17 Identity and authority checks run before a carrier is booked, not after
- ☐ 18 Suspicious changes to carrier payment details are flagged
- ☐ 19 Fraud tooling is included in the platform, not a separate subscription

ACCOUNTING

- ☐ 20 Invoices generate from the load record without rekeying
- ☐ 21 Carrier settlements and pay status are visible in the same system
- ☐ 22 Margin per load, per lane, and per customer is calculated automatically
- ☐ 23 The platform reconciles with your accounting software, both directions

CUSTOMER AND CARRIER PORTALS

- ☐ 24 Customers have a self-serve portal for status, documents, and history
- ☐ 25 Carriers can accept loads, upload PODs, and update status themselves
- ☐ 26 Portals are branded to your brokerage, not the software vendor
- ☐ 27 Portal access does not cost extra per user or per customer

REPORTING

- ☐ 28 Dashboards update in real time, not overnight
- ☐ 29 You can see margin, volume, and carrier performance without exporting to Excel
- ☐ 30 Custom reports can be built without paying for professional services
- ☐ 31 Reports export cleanly for lenders, boards, and customers

INTEGRATIONS

- ☐ 32 The platform offers a documented, open API
- ☐ 33 Load boards, ELDs, and accounting connect without custom development
- ☐ 34 Integrations are included, not billed per connection
- ☐ 35 Your data is exportable in full if you ever leave

AI AND AUTOMATION

- ☐ 36 AI builds loads from unstructured email, not just structured EDI
- ☐ 37 Check calls and status updates run automatically
- ☐ 38 Rate guidance is based on live market data, not a stale rate table
- ☐ 39 Exceptions are detected and prioritized without a human watching a queue
- ☐ 40 Automation is built into the core product, not sold as a premium tier

USER FEES AND PRICING

- ☐ 41 Pricing is published, not hidden behind a mandatory sales call
- ☐ 42 Users are unlimited, so growing your team does not raise your bill
- ☐ 43 There are no per-module or per-feature charges to unlock core functions
- ☐ 44 There are no per-carrier or per-customer record limits

IMPLEMENTATION

- ☐ 45 Implementation is led by a named person, not a help article
- ☐ 46 Historical load and carrier data is migrated for you
- ☐ 47 You have a realistic go-live date in writing before you sign

TRAINING AND SUPPORT

- ☐ 48 Training is included for your whole team, not billed hourly
- ☐ 49 New hires can be onboarded without paying for another training package
- ☐ 50 Support reaches a human who understands freight, not a generic ticket queue

YOUR SCORE

Total the boxes you ticked.

My current TMS scored _____ out of 50

Now look at which categories came up empty. Whatever your software does not do, someone on your team is doing by hand, every load, every day. That is not a software gap. It is a payroll line.



SEE THE COMPARISON

See how Polt scores against all 50.

Polt is an AI-native TMS built by freight brokers. Load building, tracking, carrier vetting, fraud detection, and reporting in one platform, with unlimited users and published pricing. Watch the walkthrough, then run your next 30 days of loads free.

[Watch the platform overview](#)

[polt.ai](#) · No credit card required

Scoring your own vendors? Print a copy per demo and make them show you the feature, not describe it.