[PLAYBOOK · EDITION 2026]

Selling to Shippers

A field playbook for freight forwarding commercial teams: prospecting, pricing, and the close.

Freight is sold on trust, priced on control, and lost on service

This playbook is built from thousands of conversations with the producers who consistently win — and with the sales leaders who watch others consistently lose. It is organised in five parts: the target, the approach, the discovery, the price, and the ninety days after the win.

Part one — Choose a target you can defend

- Pick a lane before you pick an account. A shipper buys the lane that hurts; the network is proof, not pitch.
- Score every prospect on three axes: lane fit, decision access, and incumbent fragility.
- Twenty accounts you understand beat two hundred you can name.
- Verticals compound. The second concert-logistics account costs a tenth of the first.

Signal	What it tells you	Action
New sourcing country	Incumbent lane knowledge is stale	Lead with the origin desk
Recent stock-out or delay	Service pain is fresh	Offer a contingency plan, not a rate
New supply chain hire	Mandate to re-tender	Reach out in the first 60 days
Customs penalty or audit	Compliance exposure	Lead with brokerage, not freight

Part two — The approach

Nobody switches forwarders because you called. They switch because something broke and you were the person they trusted when it did. The job of the approach is not to win the account; it is to be in the rotation on the day of the break.

- Open with the lane and one specific observation about it. Never open with capabilities.
- Reference the origin, the transit, the season, the equipment. Specificity is credibility.
- Give something away in the first contact: a rate direction, a capacity read, a customs change.

- Set a cadence and keep it for a year. Most wins are in months nine to fourteen.

> *The best accounts are already unhappy. Your job is to be known before they admit it.*

Part three — Discovery that qualifies the decision

Qualify the decision, not the shipper. Find the person who signs, the quarter they review, and the incumbent's last failure. Everything else is a tour of the warehouse.

- Who signs, and who can veto without signing?
- When was the last tender, and what changed since?
- What did the incumbent get wrong, and what did it cost in real terms?
- What does 'good' look like in numbers — transit, cost per unit, exception rate?
- What happens internally if this decision is delayed one more quarter?

Part four — Price is a story about control

Owned space, owned aircraft, owned consolidations, a pricing desk that answers in an hour — that is why your number holds. Explain where the number comes from and the number stops being negotiable.

Objection	Weak answer	Strong answer
"You're 8% higher."	Let me sharpen it	Here is what the 8% buys, in exceptions avoided
"We're happy today."	Keep me in mind	What would have to break for you to re-tender?
"Send a rate sheet."	Sending now	Send me one real shipment and I'll price the reality
"Procurement decides."	Understood	Then let's build the spec they will score you on

Part five — The first ninety days after the win

More accounts are lost in the first quarter of service than in any tender. Land the account as deliberately as you sold it.

- Write the SOP with operations in the room, not after.
- Agree the exception protocol before the first exception.
- Report margin and service to the shipper monthly, in their format.
- Book the ninety-day review on the day of the award.