

JAK Logistics LLC Business Rules for Sales Representatives

1. Prospecting & Lead Management

- All new leads must be entered into the CRM system within 24 hours of discovery or contact.
- Sales representatives may not pursue leads already assigned or engaged by another rep.
- Lead data must be regularly updated, including contact info, opportunity status, and notes.
- All cold calling and prospecting must comply with federal Do Not Call regulations and company policies.

2. Communication Protocols

- All written communications must use approved company email templates and signatures.
- Sales representatives must respond to customer inquiries within one business day.
- Misleading claims regarding rates, service levels, equipment, or delivery times are strictly prohibited.
- All customer-facing documents (quotes, proposals) must be approved by management if above pricing thresholds.

3. Quoting and Pricing

- Quotes must be based on approved rate structures and reviewed with dispatch or pricing manager before submission.
- All quotes must include fuel surcharges and accessorials (e.g., detention, layover, TONU).
- Verbal rate commitments must be documented in the CRM and followed by written confirmation within 12 hours.
- Reps are not permitted to offer discounts, extended payment terms, or service guarantees without prior approval.

4. Contracting and Onboarding

- No freight may be moved for a customer until a signed carrier agreement and shipper credit approval are on file.
- A formal customer handoff (with load preferences, contact details, and terms) must be completed before booking.

- New customer onboarding packets must be sent within 24 hours of contract signature.
- Contracts over \$25,000 or longer than 6 months must be reviewed by company leadership.

5. CRM & Reporting

- Sales activities must be logged in the CRM daily, including calls, emails, meetings, and opportunity status.
- Weekly reports summarizing pipeline status, wins/losses, and forecasted revenue must be submitted by Friday COB.
- Failure to maintain updated records may result in removal from account ownership.

6. Performance Expectations (KPIs)

Minimum monthly expectations:

- 50 cold calls
 - 10 qualified meetings
 - \$20,000 in new gross revenue
 - 3 new active accounts
- Performance reviews are conducted quarterly; consistent underperformance triggers a performance improvement plan (PIP).

7. Conduct & Ethics

- Sales representatives must uphold the highest standards of professionalism and honesty.
- Bribes, kickbacks, or incentives from customers or vendors are strictly forbidden.
- All customer, pricing, and lane data must remain confidential.
- Any suspected fraud, policy breach, or conflict of interest must be reported immediately to a supervisor.

8. Compliance

- Sales representatives must comply with all FMCSA, DOT, and company-specific safety and service regulations.
- Misrepresentation of carrier qualifications, insurance, or equipment availability is grounds for termination.
- Representatives must complete all mandatory training (compliance, safety, CRM) within required timeframes.

9. Termination & Account Ownership

- Customers secured by a sales representative remain assigned to that rep as long as the account is active and performance standards are met.
- Accounts may be reassigned if the rep is inactive, under disciplinary review, or departs the company.
- Breaches of these business rules may result in warnings, suspension, or termination of employment or contract.