



OPERATIONS PLANNING · FOR FREIGHT BROKERS AND 3PLS

Coordinator Work Split Guide

Before you hire another coordinator, find out which of today's work actually needs one. This guide gives you three tests, a task inventory with a default call for each task, and a one-week worksheet to measure your own team.

The problem

Most coordinator roles bundle two kinds of work. One protects margin and relationships: covering freight, negotiating, deciding how to recover a bad load. The other follows a written rule: check calls, tracking links, appointments, PODs, billing documents. A typical track-and-trace posting asks one person to track loads, contact drivers, dispatch, keep TMS records, verify documents and escalate problems, all at once [1]. When volume grows, the rule-based half grows fastest and crowds out the half that earns money.

Three tests for every task

TEST 1 · RULE**Can the rule be written on one page?**

If a good new hire could follow a checklist and get it right, the task is rule-based.

TEST 2 · RECOVERABLE**Is a mistake caught before it costs money?**

A late status email is recoverable. A load released to the wrong truck is not.

TEST 3 · AUTHORITY**Does it commit money, a carrier or the relationship?**

Rates, carrier approval, accessorial pay, credits and claims all do.

AUTHORITY? YES**Keep in-house**

Whatever the other answers. This is the work your people are paid to judge.

RULE AND RECOVERABLE**Can move**

Move it with an SOP and a named person to escalate to.

RULE, BUT COSTLY MISTAKES**Move with guardrails**

A checklist, a second check on a sample, and a hard stop that sends it back to your team.

Four steps

1**List the tasks.**

Start from the inventory on page 2. Cross out what your team doesn't do and add what's missing.

2**Measure one normal week.**

Two coordinators fill in the worksheet on page 3, five minutes at the end of each day. Don't change how they work that week.

3**Run the three tests on each task.**

Where your answer differs from our default, trust yours. You know your customers.

4**Move the two or three biggest rule-based tasks first.**

Not everything at once. Write the SOP, set the escalation path, measure for two weeks, then decide on the next ones.



Task inventory, with our default call

Defaults assume a brokerage with written SOPs. Your contracts, customers and risk appetite can change any row.

Task	Why	Default
COVERAGE AND CARRIERS		
Quoting, rate negotiation and carrier selection	Commits money and picks who hauls the freight	Keep in-house
Approving a new carrier	Carrier selection is now a liability question; keep the decision with your team [2]	Keep in-house
Collecting and checking carrier packets (W-9, insurance, authority lookup)	Rule-based data gathering; approval stays in-house	Move with guardrails
Posting loads and screening inbound carrier calls	Follows a script; booking decision stays with the rep	Move with guardrails
TRACK AND TRACE		
Sending tracking links and getting them connected	Clear rule, easy to check	Can move
Check calls and ETA updates	Repetitive, time-sensitive, fully scriptable	Can move
Routine status updates to customers	Template-based; exceptions go back to the account owner	Can move
Exception recovery decisions (re-power, expedite)	Spends money and affects the relationship	Keep in-house
After-hours load monitoring	Rule-based when paired with an escalation map	Move with guardrails
APPOINTMENTS AND FACILITIES		
Booking pickup and delivery appointments (portals, email, phone)	Clear rules per facility	Can move
Logging detention and layover in/out times	Timestamps recover money; approval stays in-house [4]	Can move
Approving detention, layover or TONU pay	Commits money	Keep in-house
DOCUMENTS AND BILLING		
Collecting PODs and uploading documents	High volume, easy to audit	Can move
Matching rate confirmation, BOL, POD and accessorials before billing	Checklist work that catches errors before invoices go out [3]	Move with guardrails
Carrier invoice audit and payment approval	Releasing money; keep the approval	Keep in-house
Claims and OS&D decisions	Liability and relationships	Keep in-house
Gathering claim evidence (photos, BOL notes, timelines)	Rule-based collection that supports the decision	Can move

One firm line: the decision to approve a carrier stays with your team. After the May 2026 Supreme Court ruling, how a broker selects carriers can be tested in court, and the decision, its criteria and its records should sit with people you employ and train [2]. Collecting the documents can move; approving them shouldn't.

One-week worksheet

Minutes per day, rough is fine. Then run the three tests: Y or N for each. Decision: K = keep, M = move, G = move with guardrails.

Task	Mon	Tue	Wed	Thu	Fri	Total min	Rule?	Recoverable?	Authority?	Decision
Check calls and ETA updates										
Tracking links and follow-up										
Customer status updates										
Appointment booking										
Detention / layover time logs										
POD collection and upload										
Billing document match										
Carrier packet collection										
After-hours checks										
Coverage and rate negotiation										
other task										
other task										
other task										

Reading it. Add the totals for everything marked M or G and divide by the coordinator's total hours. That share is the part of the seat that doesn't need to sit in your office.

Also check: the after-hours row. Evening and weekend touches are often routine status checks, which are the easiest work to hand to a team on a different shift.



Before you move anything

ACCESS

Own logins, least privilege

- A named user per person in your TMS, email and tracking tools; never shared passwords
- Multi-factor authentication on every login
- Read-only where read-only is enough; no access to rate tables they don't need
- Same-day access removal when someone leaves

PROCESS

Written before day one

- An SOP per task, with screenshots
- An escalation map: who decides what, and how fast
- Customer update templates
- A hard stop list: things the person never does

QUALITY

Check a sample every week

- Review  loads per week end to end
- Track errors by type, fix the SOP, not just the person
- A 15-minute weekly review in the first month

MEASURE

Baseline first, targets second

- Loads with tracking connected before pickup
- Time from delay detected to customer notified
- Hours from delivery to POD in the TMS
- Billing documents matched on the first pass

Measure two weeks before setting targets. A target you can't compare to your own baseline is a guess.

Common mistakes

MISTAKE 1

Moving judgment by accident

A task that looks routine but hides decisions, like screening carrier calls, ends up booking loads. Write the hard stops first.

MISTAKE 2

Losing the customer's voice

Routine updates can move. The account owner still makes the call when something goes wrong.

MISTAKE 3

Moving everything at once

Start with two or three tasks, measure, then add. Problems stay small and fixable.

About Optimus Innovations. We provide dedicated coordinators in Barranquilla, Colombia, for U.S. freight brokers and 3PLs: check calls, tracking, appointments and carrier paperwork, on U.S. business hours, inside your systems. This guide is free to use whether or not you ever work with us.

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Sources

1. Example duties from a published Track & Trace Coordinator posting (TEC Group, Fresno, CA, via Paylocity), 2026.
2. DLA Piper on *Montgomery v. Caribe Transport II*, May 18, 2026: brokers should document carrier selection and apply a consistent vetting process.
3. FreightWaves and OTR Solutions research, reported Dec. 10, 2025: only 2% of brokerages report fully automated accounts payable or receivable.
4. ATRI driver detention research, Sept. 10, 2024: detention fees are charged by 94.5% of fleets but paid on fewer than half of invoices.