Bright Trucking
Four Month Development Review

Company systems and investor readiness

Approximately four months of development following the operating-cycle pause reflected in the OCA
Prepared for creditors and prospective capital partners | November 7 2026

FINAL DRAFT | Sources and key on page 8 | Owner letter on pages 9 and 10

Review access key

★ View on website

★★ Linked in Sources

★★★ Preview available upon request

Select a gold marker to open its numbered entry on the Sources page. Stars identify the main review route; login requirements and limits appear beside the links. Future priorities are unmarked.

We used this development period to build the systems Bright Trucking needs to hire people, coordinate freight, explain its costs, and present an equipment investment clearly. The resulting package connects recruitment and training with shipment communications, operating analysis, and investor materials.

We expect the future value produced by these reusable systems to exceed the value of the time invested in creating them. Each qualified hire, additional productive truck, and customer relationship gives us another opportunity to use that work.

The package created

Workstream	What it gives the company
Communications framework	Consistent booking, shipment-update, delivery, and contractor records.
Operating Cost Analysis	A basis for explaining costs, utilization, compensation, and expansion scenarios.
HR process documents and automations	A defined route from initial interest through screening, onboarding, and agreements.
Training center materials	Learning centers, role guides, certification materials, and road-test content.
Investor and equipment materials	A website, video presentation, and program documents for reviewing a proposed equipment relationship.

Why this matters to an investor

An investor can inspect how equipment would enter production, who would operate it, how the company would coordinate the work, and how modeled revenue would meet operating costs. The package also makes the role of an equipment investor with financing capacity or an available line of credit easier to understand.

This review records materials and systems developed. Implementation and testing progress is identified where relevant; the three principal refinement priorities appear under Three priorities for expansion.

Communications and cost analysis

Communications framework

01 **Load Booked Receipt** ★★★. A standardized customer communication documenting a confirmed load, assigned contacts, equipment, shipment details, and applicable service information.

02 **Load Delivered Receipt** ★★★. A standardized delivery and closeout communication that supports proof of delivery, charge review, and the handoff to invoicing.

03 **Shipment Update** ★★★. The shared update framework, form specification, and email copy for shipment status, ETAs, delays, exceptions, and the next planned update. Final configuration and live testing remain implementation work.

04 **COM 16 for Book Your Own Freight contractors** ★★★. The booked-load and revenue record, with the related communications structure for contractor-managed freight.

05 **COM 17 for Book Your Own Freight contractors** ★★★. The delivered-load and invoice-document record, including supporting paperwork and items requiring company review.

Hiring dependency. COM 16 and COM 17 were prerequisites in our process for hiring Book Your Own Freight contractors. They supplied the booking and closeout records needed for that operating model, including the company handoff for invoicing and settlement review.

Operating Cost Analysis

06 **Operating Cost Analysis workbook** ★★. The OCA organizes recorded operating activity and the relationships among revenue, mileage, utilization, expenses, compensation, and remaining earnings.

07 **OCA guide and investor reading materials** ★★. Supporting explanations help readers follow the workbook, understand the assumptions, and interpret the operating examples.

08 **OCA introduction video** ★. A recorded explanation connects the operating record to the cost analysis and investor presentation. Video review and source-exhibit materials were also developed.

09 **Three operating-model cost breakdowns** ★★. Separate startup and operating schedules were developed for Company Driver, WeBook Independent Contractor, and Book Your Own Freight Independent Contractor models.

10 **Utilization and growth scenarios** ★. The analysis compares production levels, rates, shared fleet costs, and reinvestment toward three, six, and nine trucks. These are modeled scenarios.

Current companion schedule	Master version
Company Driver cost breakdown	4
WeBook Independent Contractor cost breakdown	4
Book Your Own Freight cost breakdown	5

These master versions identify the companion cost-breakdown documents, rather than a numbered version of the OCA workbook.

HR process documents and automations

The pipeline covers three job profiles: Company Driver, Independent Contractor, and Fleet Manager. The contractor profile supports the WeBook and Book Your Own Freight operating models.

Recruitment and initial interest

11 **Three job profiles** ★. Role descriptions establish the opportunity, responsibilities, and expectations for the three positions.

12 **Driver Interest Form** ★. The initial point of entry collects interest before the full qualification process begins.

13 **Interest Received automation** ★★★. The response email introduces the onboarding stages and directs applicants toward their next steps, including the Clearinghouse consent step where applicable.

14 **Public recruitment video** ★. A public presentation introduces the driver opportunity and gives prospects a consistent explanation before an HR conversation.

15 **Driver recruitment website advertising** ★. Website recruitment content presents the opportunity and connects prospects with the interest, application, and supporting information.

16 **Driver Next Steps Hub** ★. A central destination organizes applicant instructions and the progression through onboarding.

Application and screening

17 **General Driver Application** ★. The application collects the information used to review a driver for the available operating opportunity.

18 **Application automation** ★★★. The application response and progress messaging acknowledge submission and explain the remaining steps.

19 **Operating Model and Equipment Qualification Form** ★. A separate form identifies the contractor operating arrangement, equipment supplied, and equipment-related qualification information.

20 **Two Consumer Report Authorization packets** ★★. Separate packets were created for independent contractors and company drivers. The independent-contractor packet includes the W-9.

21 **Adverse-action notice materials** ★★★. The notice documents and associated process instructions support the screening workflow when an adverse-action step is required.

22 **Qualification and consent instructions** ★. The process organizes authorizations, Clearinghouse consent, screening review, and applicant follow-up within the onboarding stages.

Company value. The recruitment message, forms, notices, and progress emails now belong to one defined process. That gives HR a repeatable starting point for each applicant and gives the applicant a clearer next action.

Offers onboarding and agreements

HR process documents and automations continued

23 **Three conditional Offers of Intent** ★★★. Separate offers were developed for Company Driver, Independent Contractor, and Fleet Manager roles, connecting the initial conversation to the remaining onboarding conditions.

24 **Drug Testing Itinerary automation** ★★★. The internal preparation and email workflow standardizes the applicant instructions for the arranged drug-testing appointment.

25 **Orientation and travel itinerary automation** ★★★. The workflow organizes the travel, location, timing, and orientation instructions sent to the applicant.

26 **Three training itinerary frameworks** ★★★. The general organization was created for Company Driver, Independent Contractor, and Fleet Manager training. Detailed pacing and delivery still require further development.

27 **Three role agreements** ★★. The Company Driver employment agreement, Independent Contractor Operating Agreement, and Fleet Manager employment agreement establish the respective working arrangements. The contractor chooses the applicable operating model within the ICOA.

28 **Contractor settlement planner** ★. The planning tool helps contractors review their share, modeled costs, and the effect of operating assumptions before choosing an arrangement.

29 **Electronic signature preparation and testing** ★★★. The Adobe Acrobat Sign work includes template preparation, field and participant decisions, and selected document tests. Remaining templates continue through review and setup.

How the HR pieces connect

An interested driver can move from the role information and interest form to the application, required authorizations, qualification review, initial conversation, and conditional offer. Testing, final clearance, orientation, training, and the appropriate final agreement complete the later process.

For an independent contractor, the ICOA remains the final document signed in our onboarding process. It captures the selected operating model after the preceding qualification and onboarding steps.

Why this work adds value

The offers, itineraries, and agreements convert recruitment into an organized route toward productive service. They make responsibilities visible, reduce the need to rebuild instructions for each person, and give management a common basis for preparing a hire.

The three training itineraries already have a structure. The remaining task is to work through the actual lessons and practice activities, verify the order and timing, and sharpen delivery. That refinement is one of our three expansion priorities.

Training center materials

The training package gives the company a reusable body of instruction and assessment material for drivers, contractors, and fleet managers. Its components can be improved as training is delivered and operating experience accumulates.

Learning and reference materials

30 **Two learning centers** ★. A Driver and Contractor Learning Center and a Fleet Manager Learning Center organize the lessons and resources used for each audience.

31 **Three core reference guides** ★★. Separate guides support Company Driver and WeBook IC operations, Book Your Own Freight IC operations, and Fleet Manager responsibilities.

32 **Three complete certification question sets** ★★. Certification tests were developed for the three corresponding training tracks: Company Driver and WeBook IC, Book Your Own Freight IC, and Fleet Manager.

33 **Three certification answer keys** ★★★. A matching answer key supports consistent review and correction for each certification test.

34 **Road-test materials** ★★★. The documented road-test content and evaluation requirements support the practical part of driver qualification and training.

35 **Training videos and supporting lessons** ★. The learning centers bring together video explanations and written operating instruction so the reference material can be taught and revisited.

Additional management reference work

36 **Operations Manager Reference Guide foundation** ★★★. A separate freight-market intelligence guide was developed as Revision Draft 01. Its 12 core reading blocks explain what to monitor, why it matters, where to find the readings, and how to interpret them together.

What the counts represent

Component	Count	Scope
Learning centers	2	Driver and Contractor; Fleet Manager
Core role reference guides	3	Company Driver and WeBook; BYOF; Fleet Manager
Certification question sets	3	One complete set for each training track
Certification answer keys	3	One matching key for each question set
Training itinerary frameworks	3	General organization created; detail to refine

The Operations Manager foundation guide is additional work beyond the three core role guides. Training itinerary frameworks are listed with onboarding on the preceding page; they are shown here only to clarify the training package.

Company value. The company now has material that can be taught, referenced, and assessed across repeated hires. The itineraries still need to be worked through in detail before their pacing and delivery are treated as settled.

Investor and commercial materials

Investor and equipment package

37 **Key and Ignition investor website** ★ **IMPORTANT START HERE**. The Key & Ignition site connects the OCA explanation, startup requirements, operating-model economics, contractor planning, and growth scenarios in one review experience.

38 **Three-part investor video presentation** ★★. The presentation explains the Dealer Carrier Master Equipment Program Suite and gives prospective participants a guided introduction and deeper program explanation.

39 **Dealer Carrier Master Equipment Program Suite** ★★. The actual program document package gives the proposed equipment relationship a written structure for review, discussion, and completion.

40 **Investor outreach and funding guide** ★★★. Additional draft materials explain the company preparation, funding discussion, example payment structures, and the supporting information to provide during review. These remain review drafts.

How the package supports an investment discussion

The website and cost schedules make a central funding distinction visible: equipment acquisition and financing capacity are separate from deployment and operating liquidity. A prospective equipment investor can see which part of the launch they would support and how the company expects production to fund ongoing costs.

That clarity gives both parties a more concrete basis for a discussion. The investor can review the operating model, examine the assumptions, and connect the proposed equipment arrangement with the personnel and systems needed to use it.

Management expects this clearer explanation to improve the prospect of reaching a suitable agreement, including with an investor who can provide financing capacity or use an available line of credit. An executed transaction and subsequent operating results will establish the financial outcome.

Additional customer acquisition preparation

41 **Shipper availability email campaign draft** ★★★. The outreach draft uses planned truck location and timing, a designated fleet-manager contact, booking and delivery examples, and a shipper setup route. It also accommodates the customer's own agreement and invites future freight opportunities.

Before campaign launch, the final links and campaign setup still need completion.

Why these materials matter together

An investor can now review the financial explanation alongside the operating preparation. The recruitment pipeline identifies how people enter the company, the training package explains how they learn the work, and the communications framework shows how the company intends to document service once a truck is producing.

Three priorities for expansion

The next development cycle can begin with materials already created. The principal work is to connect, validate, and refine that foundation as Bright Trucking prepares for expansion.

1 Automate OCA data intake

Connect the operating and accounting records to the OCA so recurring revenue, mileage, and expense information can enter the analysis with less manual work. Define the field mappings, exception review, and reconciliation needed to keep the numbers useful.

Completion evidence. Run a controlled reporting period through the process, reconcile it to the source records, and verify that corrections carry into the analysis.

2 Complete the customer shipment tracking page

Develop the customer-facing page that brings shipment information and available tracking into one clear place. Connect it with the booking, status-update, and delivery workflow, and confirm what customers can see for the applicable shipment.

Completion evidence. Follow a test load from booking through delivery and verify customer access, current status, update timing, and supporting links.

3 Refine the three training itineraries

Work through the learning centers and actual videos, decide the most useful sequence, assign practice and discussion time, and sharpen the daily plan for each role. This requires reviewing and rehearsing the training, which is why it remains a meaningful block of work.

Completion evidence. Walk through each itinerary against its lessons, reference guide, certification, and applicable practical evaluation. Confirm that a trainer can deliver the sequence in the time allowed.

The return on the investment of time

Our argument is that these four months created value that Bright Trucking can use repeatedly. The communications framework supports additional loads; the HR and training materials support additional hires; the OCA supports operating decisions; and the investor package supports a clearer equipment and financing discussion.

We expect the investment of time to produce more value than it consumed. That return will be earned by putting the systems to use, securing suitable capital, deploying productive equipment, serving customers, and retaining cash for the next stage of growth.

Review basis. This document consolidates management's November 7, 2026 account and the current company materials checked for this review, including the Key & Ignition blueprint, the three cost-breakdown masters, COM 16 and COM 17 review materials, Shipment Update build sheet, OCA video review, Investor Outreach and Funding Guide, Operations Manager Reference Guide, and shipper email draft. The value argument expresses our expectation for future use of these systems.

Inventory convention. Related items are grouped for readability. File formats, earlier revisions, and shared content appearing in more than one tool are not separate accomplishments. Household and personal work are outside this review.

Sources and access

★ View on website ★★ Linked in Sources ★★★ Preview available upon request

Match the numbers below to the 41 inventory entries. Member collections require login and the applicable role or program access. Select a link to view the material or request a preview.

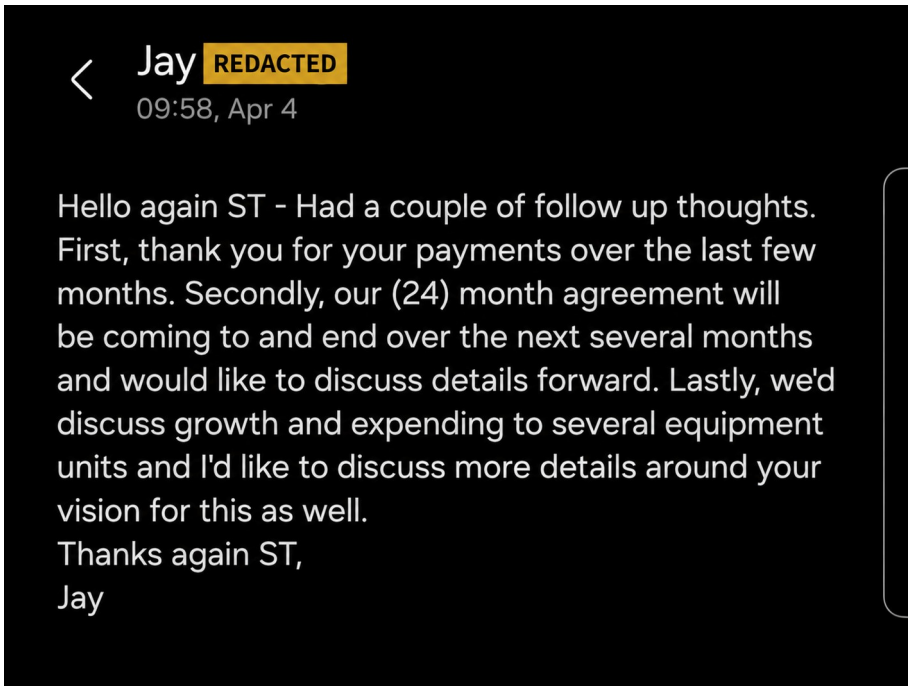
Inventory 01 to 21	Inventory 22 to 41
01 ★★★ **Load Booked Receipt** Request preview | Operations	22 ★ **Qualification and consent instructions** Next Steps Hub
02 ★★★ **Load Delivered Receipt** Request preview | Operations	23 ★★★ **Three conditional Offers of Intent** Request preview | HR
03 ★★★ **Shipment Update** Request preview | Operations	24 ★★★ **Drug Testing Itinerary automation** Request preview | HR
04 ★★★ **COM 16 for BYOF contractors** Request preview | Operations	25 ★★★ **Orientation and travel automation** Request preview | HR
05 ★★★ **COM 17 for BYOF contractors** Request preview | Operations	26 ★★★ **Three training itinerary frameworks** Request preview | HR
06 ★★ **OCA workbook** Member dashboard | Login required	27 ★★ **Three role agreements** ICOA example | Other roles | Request
07 ★★ **OCA guide and investor materials** Member dashboard | Login required	28 ★ **Contractor settlement planner** Open settlement planner
08 ★ **OCA introduction video** Watch on website	29 ★★★ **Electronic signature preparation** Request preview | HR
09 ★★ **Three cost breakdowns** Complete source schedules | Public	30 ★ **Two learning centers** Driver and Contractor | Fleet Manager
10 ★ **Utilization and growth scenarios** View growth model	31 ★★ **Three core reference guides** Role document collections | Login required
11 ★ **Three job profiles** Company Driver | IC | Fleet Manager	32 ★★ **Three certification question sets** Role assessment collections | Login required
12 ★ **Driver Interest Form** Open interest form	33 ★★★ **Three certification answer keys** Request preview | HR
13 ★★★ **Interest Received automation** Request preview | HR	34 ★★★ **Road test materials** Request preview | HR
14 ★ **Public recruitment video** View homepage video	35 ★ **Training videos and lessons** Driver and Contractor | Fleet Manager
15 ★ **Driver recruitment advertisement** Open Driver Opportunities | Public	36 ★★★ **Operations Manager guide foundation** Request preview
16 ★ **Driver Next Steps Hub** Open Next Steps Hub	37 ★ **Key and Ignition investor website** **IMPORTANT START HERE**
17 ★ **General Driver Application** Open blank application	38 ★★ **Three part investor presentation** Member dashboard | Login required
18 ★★★ **Application automation** Request preview | HR	39 ★★ **Dealer Carrier Equipment Program Suite** Member dashboard | Login required
19 ★ **Operating model and equipment form** Open IC qualification form	40 ★★★ **Investor outreach and funding guide** Request draft preview
20 ★★ **Two authorization packets** Company Driver | Independent Contractor | Adobe	41 ★★★ **Shipper availability campaign draft** Request draft preview
21 ★★★ **Adverse action materials** Request preview | HR	

Access notes. Items 06, 07, 31, 32, 38 and 39 use member collections; login and authorized access are required. Item 27 links an example ICOA; request the other role agreements. Embedded learning files may have separate permissions. Receipt requests cover fleet-manager and independent-contractor versions plus shipment updates.

Closing letter sources M1 Ohio BMV Oct 23 2026 | M2 FMCSA CDL review | M3 DAT Sep 2026 rates

Why I invested this time

A letter from ST | November 7 2026



Jay's invitation to discuss expansion to several equipment units. Surname redacted for privacy.

To our creditors and prospective capital and equipment partners,

I want to explain the decision behind the four months of work documented in this review. Our financial profile weakened while Bright Trucking generated no revenue during that period. I recognized the cost of that pause and believed a trade-off was necessary: invest the time in reusable systems that would allow us to onboard drivers and equipment, coordinate freight, and present a concrete expansion plan.

Jay's request for a plan captures the question this work was intended to answer. We needed to show how an investor's equipment and financing capacity connect with our deployment budget, hiring process, and production economics. These materials make that plan visible and give prospective partners a way to inspect the preparation.

The market added urgency. On October 23, Ohio BMV said it had reviewed about 5,000 non-domiciled CDLs, downgraded about 2,000, and would downgrade the remaining credentials with 30 days' notice. [M1] FMCSA's review spans many jurisdictions. [M2] I expect continuing enforcement could keep capacity constrained or tighten it further. The timing and extent of that effect remain uncertain, and I do not know how long the pricing window will last.

DAT reported a September 2026 national dry-van contract benchmark of $3.24 per mile including fuel, up 13 cents from August. [M3] Our model's $3.29 loaded-mile upper case shows why stronger pricing could accelerate reinvestment. Actual booked rates, current fuel costs, utilization, and collections will determine the result.

An equipment investor with financing capacity can change the growth path by supporting acquisition while Bright Trucking funds or arranges deployment. That advantage made it urgent to develop the investor explanation and the processes needed to bring qualified people and equipment into revenue service. The qualification documents, training, agreements, and communication records explain the steps we have taken to mitigate risk and help a growing fleet operate efficiently.

My goal is to use a productive part of the freight cycle to build scale, reserves, and customer relationships that make the company more resilient when rates decline again. I believe this investment of time will produce more value than it consumed. The foundation is now in place, with the remaining refinements identified in this review. I believe the work we have done makes Bright Trucking an excellent place to plant your flag and a company worth standing behind.

ST

Owner | Bright Trucking

Market references M1 to M3 are linked on the Sources page.