SHIPMENT PLANNING GUIDE / FREE STARTER GUIDE

From Quotation to Delivery

Map a fictional shipment, compare quotations and identify who owns each handover.

Allow 30 minutes for reading and practice. No account required.



Illustrative African business or field scene, created with AI. Not an actual engagement.

Give every provider the same brief

Write the cargo description, quantity, packaging, collection and destination points, and required timing before requesting quotations. Include relevant handling needs and ask what each quote includes and excludes. Keep the assumptions visible. A low headline price may cover a different route, service level or set of charges. A useful comparison considers the whole agreed scope, the responsible parties and how exceptions will be handled.

Map delivery and payment separately

Draw the physical journey: collection, storage where needed, departure, border processing and delivery. Then draw the payment timeline alongside it. Delivery terms and payment arrangements answer different questions. ICC explains that Incoterms rules allocate certain delivery responsibilities, costs and risks, but do not settle payment arrangements or ownership of the goods. Ask a qualified adviser about the terms appropriate to an actual contract rather than treating a three-letter term as a complete agreement.

UNDERSTAND THE LIMITS / TEST YOUR REASONING

Create a handover record

For each stage, name the responsible organisation, the evidence expected and the person to contact if the milestone is missed. Confirm product-specific and route-specific documents with the appropriate authority or customs professional. Note any missing information before collection. At delivery, record what was received, any exceptions and the agreed follow-up. A completed delivery note and a reconciled invoice are different tasks; the plan should make room for both.

A fictional practice scenario

Two fictional freight providers quote for the same shipment. One includes collection and destination handling; the cheaper quote lists only the main transport leg.

What should you do before comparing the totals?

A. Choose the lower number.

B. Request the missing scope and charges so both quotes cover the same journey.

C. Assume the unlisted services are free.

Worked response

The strongest response is B. A comparison is meaningful only when the scope and assumptions are consistent. Ask each provider to clarify exclusions, charges and handover responsibilities.

Reading and context

ICC: Incoterms rules questions and answers

The explanations and worksheet are original Capital Africa material. Follow the linked publishers for their own guidance. Educational material does not replace legal, financial, tax or engineering advice, laboratory testing, or current guidance from relevant authorities.

YOUR WORKING DOCUMENT

Make the learning practical.

Work through a fictional example first. Use these prompts to organise your notes; keep confidential information out of shared learning discussions.

1. Cargo, packaging and special handling needs

2. Origin, destination and required timing

3. Included services, exclusions and cost assumptions

4. Milestones and the owner of each handover

5. Documents and confirmation still needed

6. Exception contacts, delivery evidence and invoice reconciliation

Next action / owner / review date: