



# 15-Minute Q&A Top 10 Best Practices



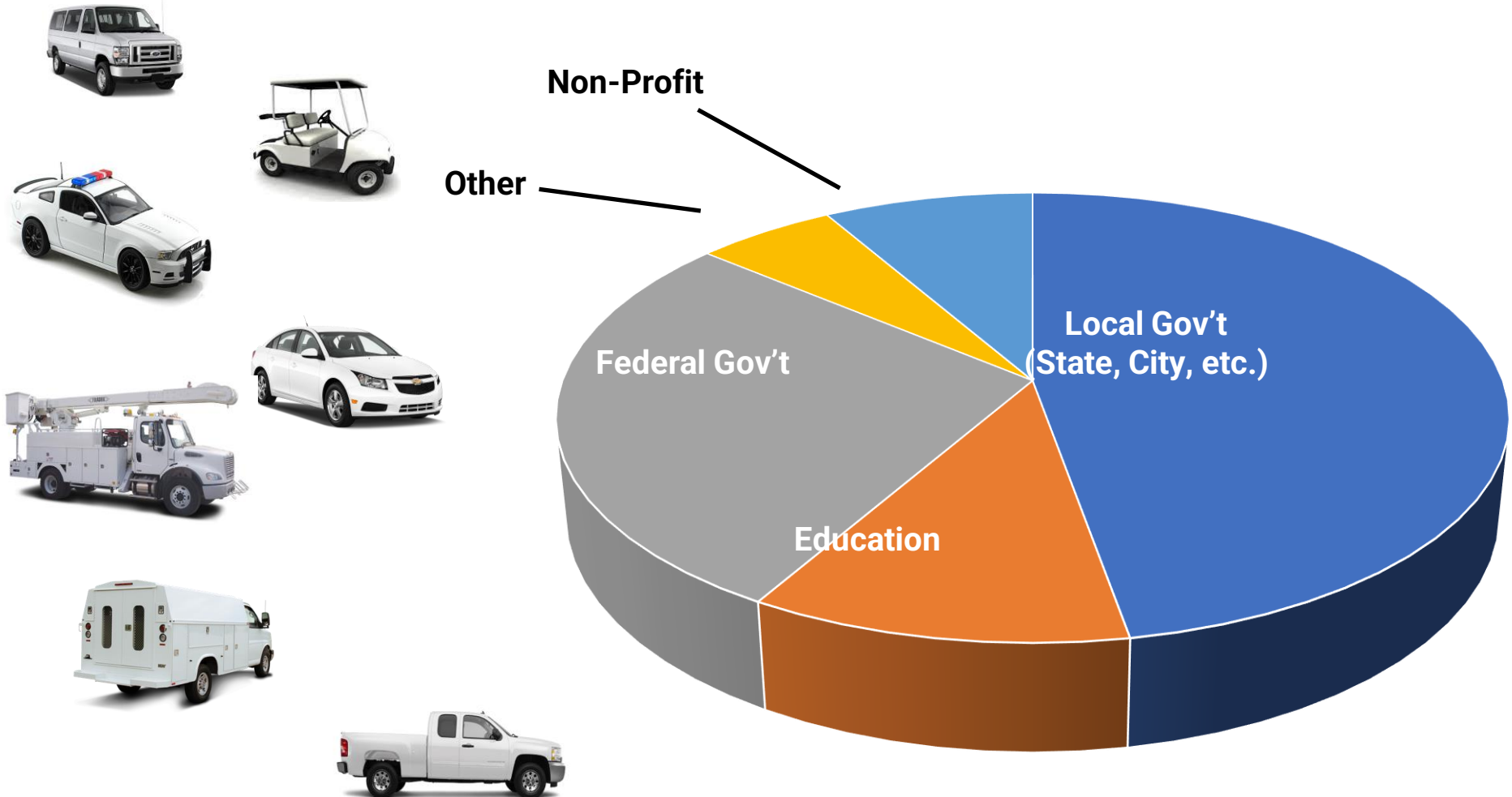
# Introduction



If you are new to  
fleet, or just feeling  
lost...

Get back to basics

# Your Best Practices May Vary...



1.

# POLICY

# Have Comprehensive Fleet Policy

- Policy is generally the foundation for everything you do to manage or change your fleet
- Good policy is like having a money tree
- Have cradle-to-grave, comprehensive fleet policy
- Use a “steering organization” to set, manage, and recommend policy
- Use a process for keeping policy current
  - One innovative fleet updates one fleet policy section per month!



# Have Comprehensive Fleet Policy

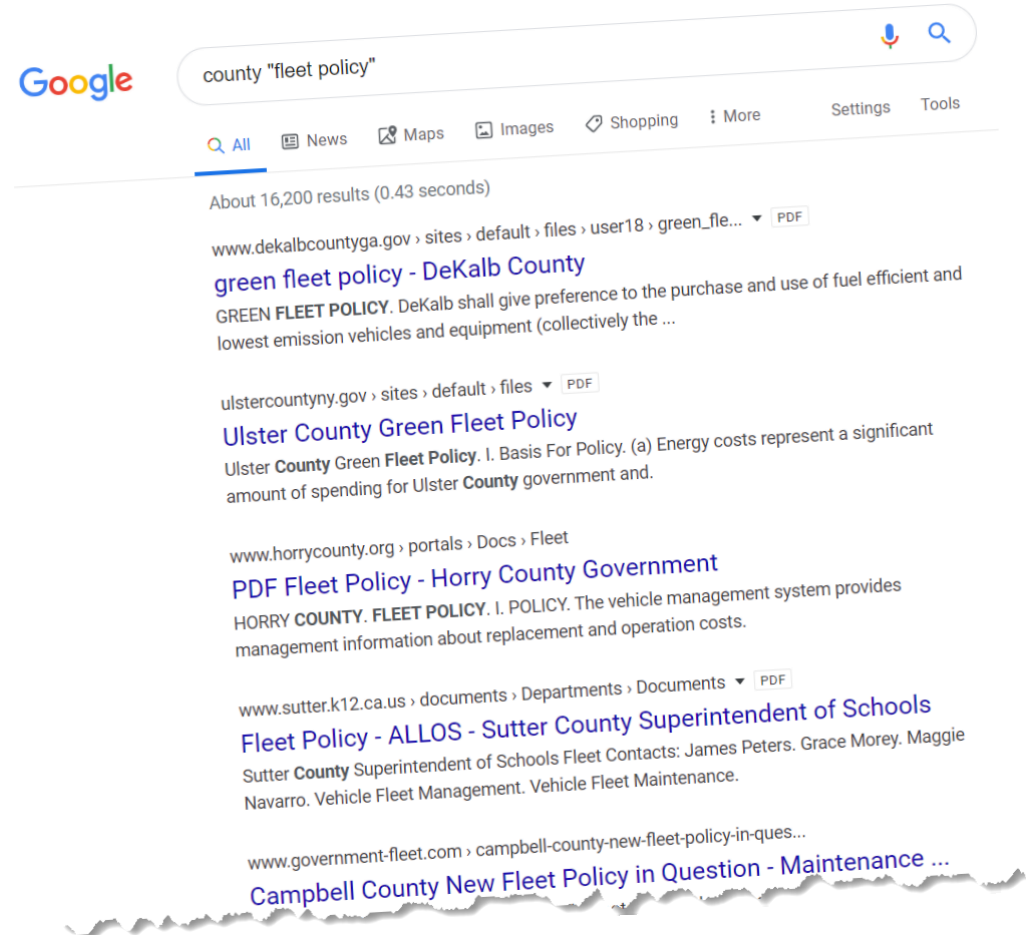
- **Fleet Management Authority and Organization**
  - Overall Fleet Mission & Goals
  - Benchmarks, Policies and Plans
  - Fleet Policy
  - Financial Policy
  - Management Organization
  - Information Technology Foundation
- **Fleet Policy Management**
  - Cost Control and Chargeback Management
  - Assignment and Fleet Size Management
  - Fleet Replacement (Cycling) Management
  - Fleet Service Delivery Management
- **Fleet Services Delivery**
  - Maintenance and Repair Services
  - Fueling Services
  - Motor Pool Services

## Specific needs of your fleet, e.g.:

- DOT requirements
- GPS guidelines
- Drug screening
- Eligibility of dependents
- Lowest cost alternatives
- Allowable passengers
- Vehicle branding / undercover
- TEMPORARY, time-bound, changes due to COVID-19

# Have Comprehensive Fleet Policy

Don't re-invent the wheel



*“Government fleet policy”*

*“University fleet policy”*

*“Company fleet policy”*

*“Drug screening for fleet drivers”*

*“Fleet GPS policy”*

# Have Comprehensive Fleet Policy

It's a lot easier to be proactive... than reactive

**Audit Prompts Ohio Sewer District to Reduce Fleet - Top News ...**  
[m.government-fleet.com/news/.../audit-prompts-ohio-sewer-district-to-reduce-fleet](http://m.government-fleet.com/news/.../audit-prompts-ohio-sewer-district-to-reduce-fleet)  
Mar 1, 2017 - The utilization policy set by the city is 350 miles per month for passenger vehicles. Using this utilization policy annually, auditors found the city ... Responds to Fleet Audit Claiming Wa

**Illinois Fleet Audit Finds State Vehicles Are Underutilized - News ...**  
[www.government-fleet.com/.../illinois-fleet-audit-finds-state-vehicles](http://www.government-fleet.com/.../illinois-fleet-audit-finds-state-vehicles)  
Nov 4, 2011 - Not all State agencies were following CMS agencies using CMS vehicles should ... ded that

**U.S. mismanaged \$1 billion armored vehicle fleet, audit says - The ...**  
[www.denverpost.com/2017/02/15/armored-vehicle-fleet-audit/](http://www.denverpost.com/2017/02/15/armored-vehicle-fleet-audit/)  
Feb 15, 2017 - U.S. mismanaged \$1 billion armored vehicle fleet, audit says ...

**Vehicle-fleet audit urged - Los Angeles Daily News**  
[www.dailynews.com/general-news/20070628/vehicle-fleet-audit-urged](http://www.dailynews.com/general-news/20070628/vehicle-fleet-audit-urged)

"It's high time that we gained a thorough understanding of the city's vehicle policy and use it to ensure that all city-owned vehicles are used ...



# Have Comprehensive Fleet Policy

Good examples of policies:

1. Govt: Iowa DAS Policies and Procedures (comprehensive)  
<https://das.iowa.gov/sites/default/files/fleet/pdf/DASFleetPNPmanual.pdf>
2. Higher Education: Yale University (comprehensive)  
<https://your.yale.edu/policies-procedures/policies/1705-university-fleet-policy>
3. Frisco Texas: City of Fresco Personnel Policies Section: Vehicles (good GPS, geo-fence, speed, idling examples)  
<https://friscotexas.gov/DocumentCenter/View/6081/GPS-Vehicle-Tracking-Policy-PDF>

2.

# COMMUNICATE AND ENFORCE POLICY

# Communicate & Enforce Policy

- Policy has limited value if it's not shared and enforced
- Communicate!
  - E.G., FMIS interfaces, Emails, in-vehicle docs, posted metrics
- Ensure all drivers acknowledge fleet policy
  - Before driving, Every time policy changes
- Enforce policy - automatically
  - Policy enforcement is often the first thing dropped when things get busy
- Clearly define related roles and processes
- Centralize overall responsibilities

# Communicate & Enforce Policy

Automate the communication and enforcement of policy

The screenshot shows the Forsyth County North Carolina Fleet Management Services login page. The page features a sidebar with navigation links under 'VEHICLE USE' and 'INFORMATION'. The main content area is titled 'Please Login' and includes a 'You can put policy text here' section with a 'Testing for 5.04' note. A 'Microsoft Internet Explorer' warning dialog box is overlaid on the page, displaying a yellow warning icon and the text: 'Please read our Policies and confirm you agree to the terms by clicking the button at the bottom of page.' with an 'OK' button. A callout box points to the 'Please Login' section with the text: 'Require that drivers acknowledge new or changed fleet policies'. The page also includes a 'Forgot password?' link and a 'Notice' at the bottom stating that all logins are logged for security reasons.

Forsyth County | North Carolina

FLEET MANAGEMENT SERVICES

**VEHICLE USE**

- MAKE RESERVATION
- MY SCHEDULE
- CAR POOL
- MY PROFILE
- MY EXPENSES
- MY VEHICLES
- MY REPORTS
- ACCIDENTS
- VEHICLE CONFIG
- SILENT BID
- MY BIDS
- ORDER A VEHICLE
- MY ORDERS
- LEASE PLANNER
- PACCAR VEHICLE INFO
- SHOP MANAGER DASHBOARD
- TECHNICIAN DASHBOARD

**INFORMATION**

- ON-LINE TRAINING
- POLICIES
- CONTACT US
- VEHICLES AND RATES

Please Login

You can put policy text here

Testing for 5.04

First time users:

To create a FleetCommander account, click on the "Sign Up" link in the left hand navigation bar; then complete and submit the form.

Reserving a company vehicle:

Please enter your FleetCommander username and password (this is your Amazon username/password)

Microsoft Internet Explorer

Please read our Policies and confirm you agree to the terms by clicking the button at the bottom of page.

OK

Forgot password?

Clear Login

Notice: All logins (and attempts to login) are logged for security reasons.

Require that drivers acknowledge new or changed fleet policies

# Communicate & Enforce Policy

Automate the communication and enforcement of policy

The screenshot displays the 'Vehicle Reservation - Finish Request' page. On the left is a navigation menu with sections: 'Vehicle Use' (containing links like Make Reservation, My Schedule, Car Pool, My Profile, My Expenses, My Vehicles, My Reports, Accidents, Vehicle Config, Silent Bid, My Bids, Order a Vehicle, My Orders, Lease Planner, PACCAR Vehicle Info) and 'Information' (containing links like On-line Training, Policies, Contact us, Vehicles and Rates, Locations, FAQs, Terms of Use, Privacy Statement, Documents, Sign Up Now!, Give us your Feedback!). The main content area shows a 'Confirm Request' form for 'Testing for 4.11'. The form includes 'Requestor Information' (User ID / name: Esmith / Mr. Edwin Smith, E-mail address: esmith@agilefleet.com, Driver's user ID: Esmith / Mr. Edwin Smith), 'Schedule Information' (Pick-up, Return, Duration), 'Selection Information' (Usage Type, Site, Location, Type, Options, Number), and 'Additional Information' (Department, Cost Center, Destination, Purpose, Overnight, Inspection, Fund Code, Origin Code, Program Code, Est. total mil, visit type, test 11, test 12, Sunglasses?, Comments). At the bottom, there are checkboxes for 'Auto-assign to a vehicle?' (checked) and 'Ignore buffers?' (unchecked), and buttons for 'Previous (Change Request)', 'Cancel Request', 'Submit Request', and 'Submit and Make Similar Request'. A modal dialog box titled 'Message from webpage' is overlaid on the form, displaying a warning icon and the text: 'The license of the driver has not been validated. The driver will need to show the fleet staff a valid license when the vehicle is picked up.' with an 'OK' button.

Vehicle Reservation - Finish Request

**Confirm Request**  
Testing for 4.11

**Requestor Information**  
User ID / name: Esmith / Mr. Edwin Smith  
E-mail address: esmith@agilefleet.com  
Driver's user ID: Esmith / Mr. Edwin Smith

**Schedule Information**  
Pick-up: [blank]  
Return: [blank]  
Duration: [blank]

**Selection Information**  
Usage Type: [blank]  
Site: [blank]  
Location: [blank]  
Type: [blank]  
Options: [blank]  
Number: [blank]

**Additional Information**  
Department: [blank]  
Cost Center: [blank]  
Destination: [blank]  
Purpose: [blank]  
Overnight: [blank]  
Inspection: [blank]  
Fund Code: [blank]  
Origin Code: [blank]  
Program Code: [blank]  
Est. total mil: [blank]  
visit type: [blank]  
test 11: [blank]  
test 12: [blank]  
Sunglasses?: [blank]  
Comments: (none)

☒ Auto-assign to a vehicle? ☐ Ignore buffers?

Previous (Change Request) Cancel Request **Submit Request** Submit and Make Similar Request

**Message from webpage**

The license of the driver has not been validated.  
The driver will need to show the fleet staff a valid license when the vehicle is picked up.

OK

[Privacy Statement](#) • [Feedback](#)

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# 3.

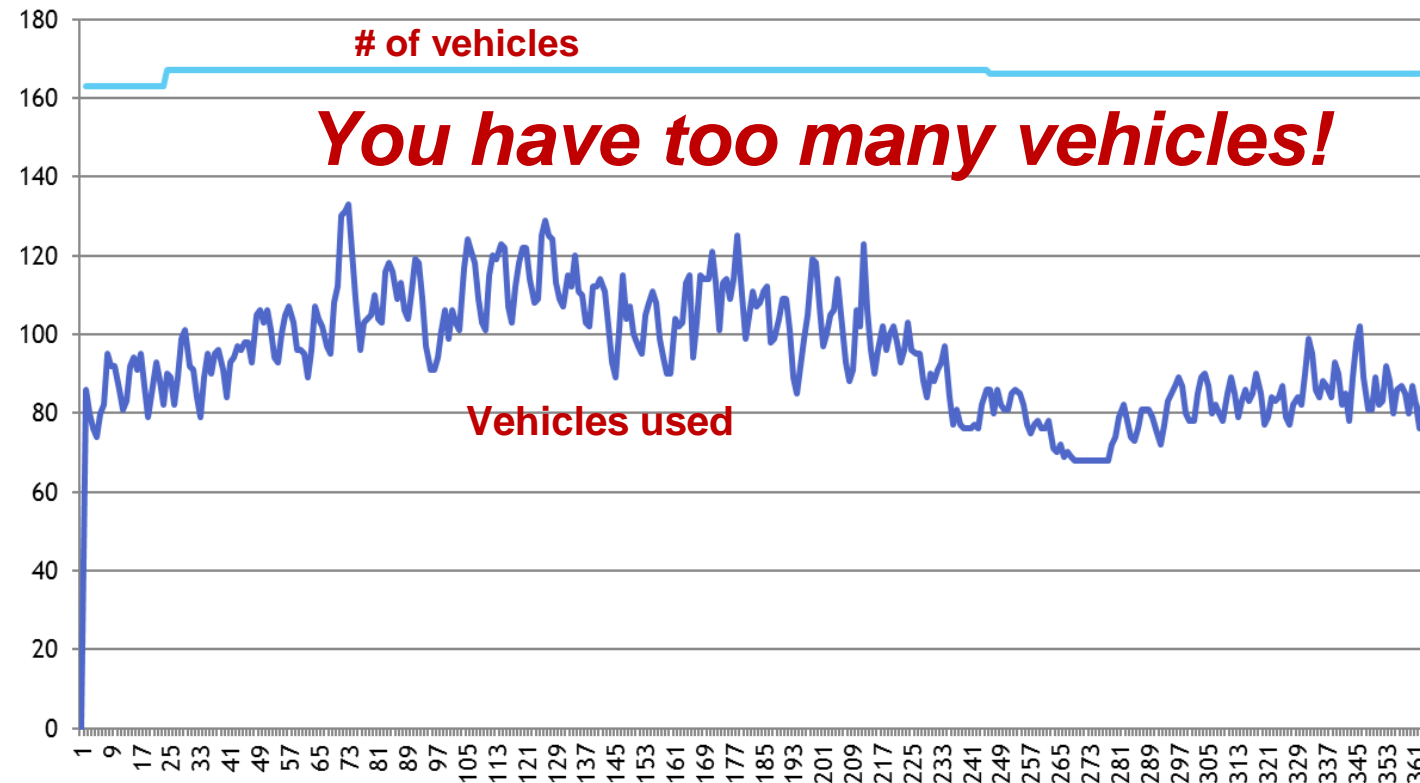
# FMIS

# Fleet Management Information System

- You need “a” fleet management information system!
- In 2022, many large fleets are still using:
  - Excel
  - Outlook
  - Mainframe asset management systems
- FMIS should be accessible to all fleet stakeholders
- Own your fleet data
- Understand and take advantage of fleet data
- Make sure data can be shared across other enterprise systems

# Fleet Management Information System

Your FMIS should tell your fleet story



Day by Day Fleet Utilization

4.

# PREVENTIVE MAINTENANCE

# Preventive Maintenance Program

- Well-maintained vehicles cost less to operate
- There is liability in not maintaining your fleet
- Obstacles of the past have been eliminated
  - Manual processes
  - Spreadsheets & whiteboards
- Your FMIS should give you a clear picture of your break-even point for vehicle replacement, i.e., versus continued repairs and preventive maintenance



5.

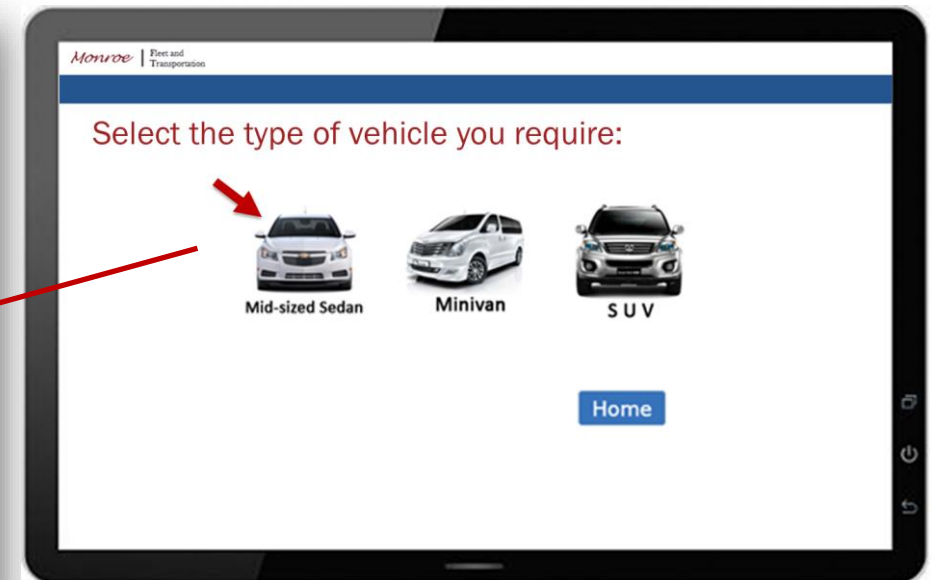
# SHARE VEHICLES

# Share Vehicles

- Pooling vehicles is one of the most effective means of increasing utilization of fleet vehicles
- Sharing provides for:
  - Vehicles-on-demand (pay as you go)
  - Access to more vehicles
  - Access to more types of vehicles
- Cost savings generally exceed \$4,000 annually per vehicle for every vehicle eliminated via sharing
- Don't limit yourself to passenger vehicles
- Obstacles of the past have been eliminated
  - Manual processes, Limited hours, Etc.

# Share Vehicles

Sharing vehicles is more efficient than ever before



# Share Vehicles

City of Stamford CT eliminated 61 of 80 assigned vehicles!

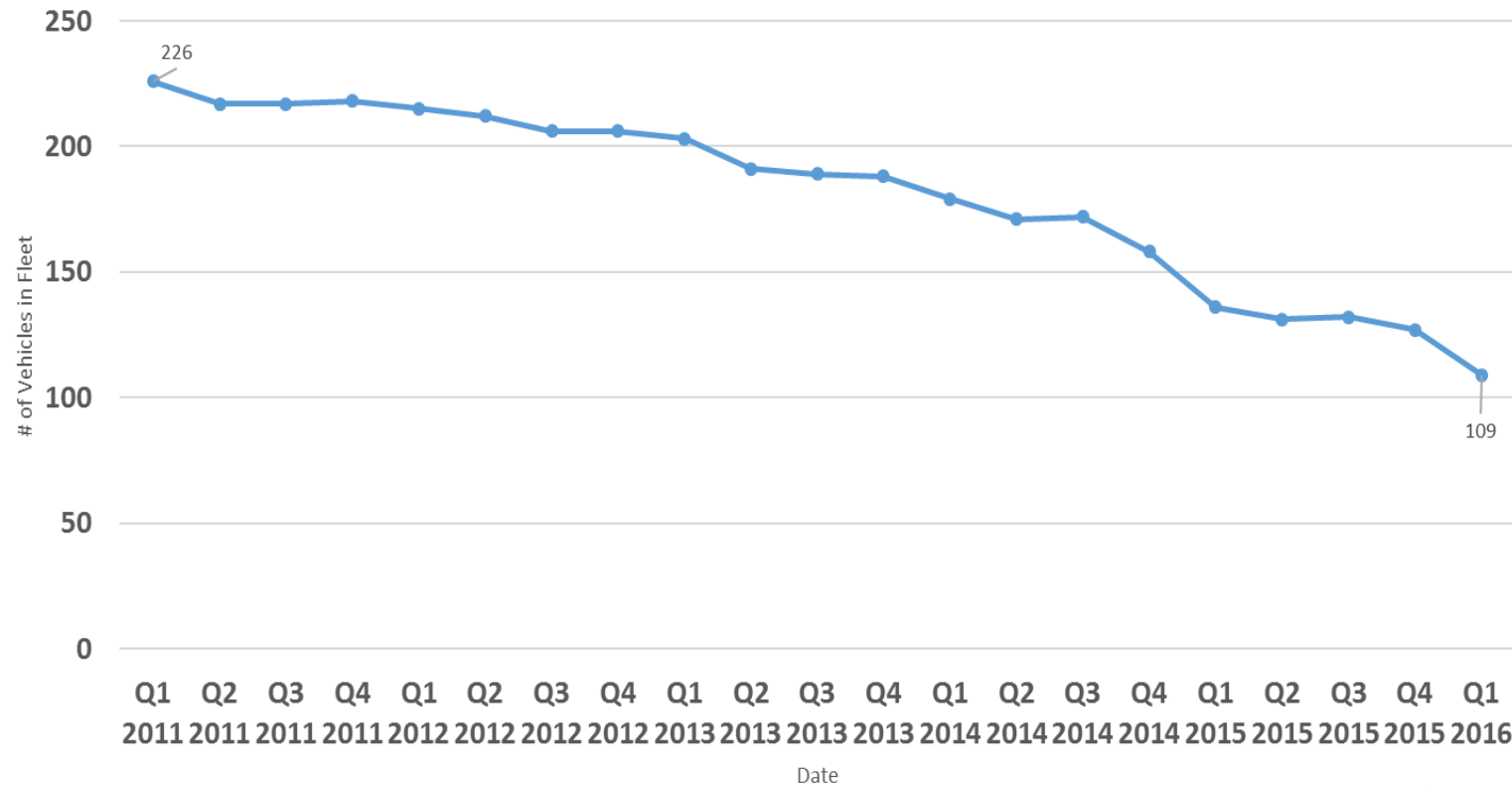
- ✓ Consolidated 80 department assigned vehicles into 1 centralized motor pool
- ✓ Immediately eliminated 30 vehicles
- ✓ Monitored utilization and ultimately eliminated another 21 vehicles... totaling 51 vehicles eliminated.
- ✓ Savings from reducing 51 vehicles:
  - ✓ \$204,000 in disposal income
  - ✓ \$357,000 annually (maintenance, depreciation, etc.)



# Share Vehicles

Cornell saves more than \$500K annually... (\$10M+ total)

Cornell's Fleet Size Over Time





6.

# MAKE ADJUSTMENTS TO MEET THE NEEDS OF THE DAY

# Make Adjustments



*"Dead batteries, rusted rotors/calipers and dry rotted wiper blades have been an issue for us. We have hired a young man (part time 4 hours per day) at our primary location to start vehicles, check fluids and keep an eye on the fleet. At the other locations, we have our Facilities staff doing the same."*

County fleet manager

*"It is crazy how fast the batteries will go down when they are not driven for weeks."*

University fleet manager

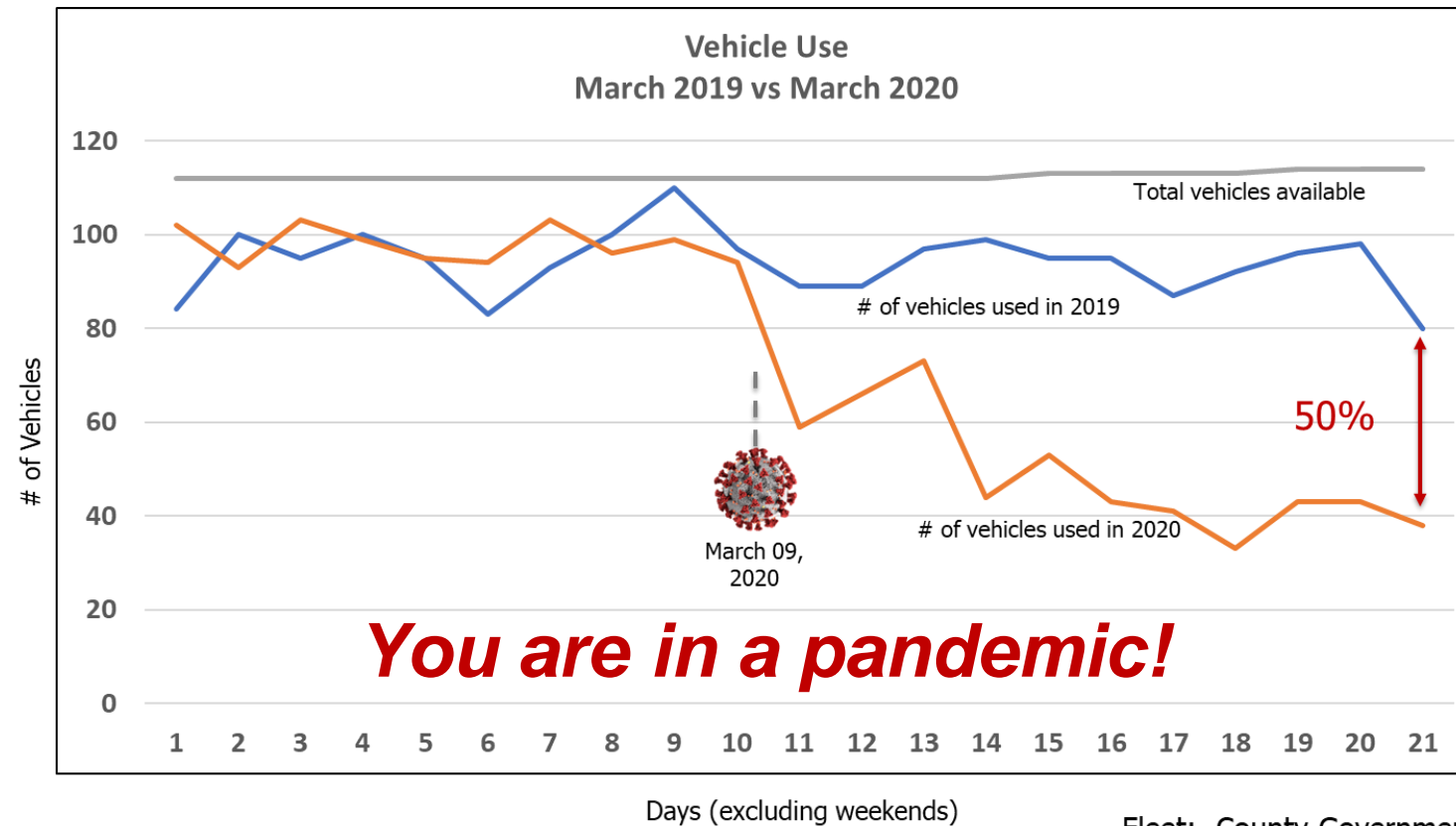


*"Rotting wipers and flat-spotted tires are common...and brake calipers corroded like the rotors."*

Commercial fleet manager

# Make Adjustments

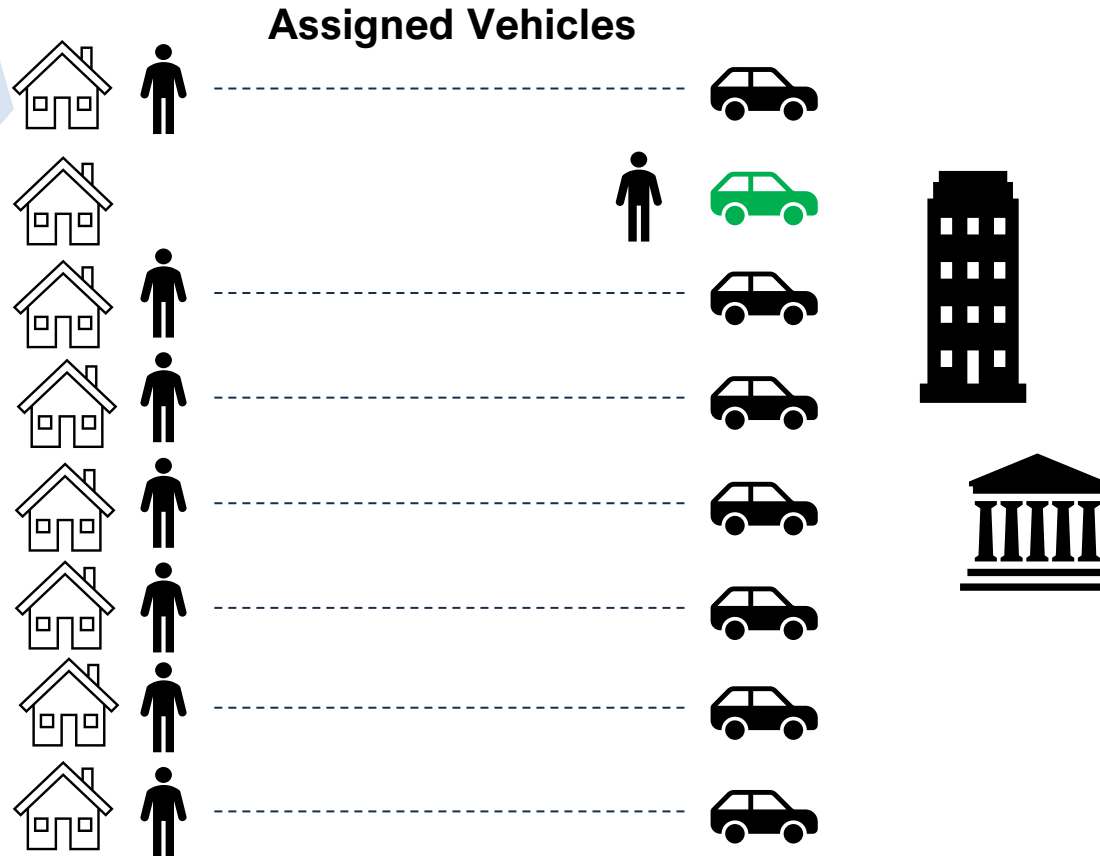
Listen to what your FMIS is telling you... and act!



Fleet: County Government

# Make Adjustments

Today, more than ever, your needs may be changing



- Work-from-home scenarios can have an impact as big as 1:1 drivers-to-vehicles
- Roles (e.g., inspectors, home visits, assessors) are being re-defined considering the pandemic... often reducing the need for vehicles
- A vehicle assigned to an individual may sit idle for up to five weeks annually due to vacation, sick, and other time off alone
- Assigned vehicles that are not in use are costing money

# Make Adjustments

1. Change policy... if needed
2. Change quantities of vehicles
3. Change the class of vehicles
4. Change the location of vehicles
5. Change the method of providing vehicles (e.g., shared versus assigned)

*“Deliver what matters”*



# Make Adjustments

## Make a Plan



*Although we may not know exactly where we're headed, we know we need to prepare for more changes now.*

7.

**METRICS, METRICS, METRICS...  
START SOMEWHERE!**

# Get Odometer data!

- If you can only capture one piece of information, capture odometer data!
- Odometer (and other utilization metrics) data drives maintenance, billing, replacement, and other activities
- Use all sources available... preferably automated:
  - GPS/telematics, fuel systems, Work Orders, on-line reporting, motor pools, etc.
- Avoid humans!

# You Need Data!

Really?



Use ANY metric to track utilization... even if it's only odometer.

8.

# KNOW THE MONEY

# Know the Money – Know the Fleet

- Understanding the money behind your fleet is key to managing a healthy fleet
- Understand the numbers that your management team is most interested in
- Know your organization's cash position (buy versus lease, CAPEX vs OPEX, vendor relationships, etc.)
- Understand Total Cost of Ownership (TCO) for all vehicles in the fleet
- Develop budgets and track against them regularly
- Have a vehicle replacement plan

# Know the Money – Know the Fleet

How many vehicles are in your fleet?	100	vehicles
What % of your vehicles are used each day during COVID?	35%	% of vehicles used each day
Average annual cost per vehicle (including maintenance, depreciation, administrative, insurance, registration, etc.)	\$4,000	annual cost per vehicle
Every weekday (Monday - Friday) you delay making a change in your fleet size may be costing you this much!	\$712	Idle vehicle costs per day
Days since start of COVID-19 shutdown:	696	3/9/2020 2/3/2022
Total cost of idle vehicles since start or COVID:	\$495,781	
What date do you think things will return to normal?	1/2/2023	
Total cost of idle vehicles at end of COVID:	\$732,986	

9.

**KEEP GROWING**



# Learn and Grow Every Day

- Seek fleet certifications (e.g., CAFS, CAFM)
- Attend local and national meetings and conferences
- Take advantage of vendor training
- Understand your partner's business (e.g., dealers, parts)
- Seek fleet awards
  - You'll learn more than you can imagine
  - Your team will get the recognition it deserves
- Educate all stakeholders (technicians, drivers, managers, risk managers, business analysts)

10.

**CELEBRATE**

# Celebrate Your Successes

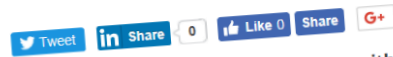
- Share your annual fleet plan with all stakeholders
- Acknowledge milestones reached against your plan, e.g.,
  - Launching of a new vehicle sharing initiative
  - Receipt of electric plug-in vehicles
  - Hiring of an additional technician
  - Achieving a targeted utilization rate
  - Certifications achieved by drivers

# Celebrate Your Successes

Insights, ideas, & expertise for optimal fleet management

## Part 1: An Insider's look at Prince George's County, MD Fleet Success with Rick Hilmer, CAFM

Posted by The Agile Fleet on April 14, 2016



This is Part One of a two-part Interview with Rick Hilmer, County Fleet Manager for Prince George's County, MD Office of Central Services.

County fleet expert and Certified Automotive Fleet Manager (CAFM) Rick Hilmer has worked in county fleet management since 1994. The Prince George's County Fleet Management Division currently oversees 3,500 light vehicles, which include both public safety and public service vehicles.

### Part 1: County Government Fleet and Motor Pool Automation

Q: Give us a brief history of your career in fleet.



# QUESTIONS

# Questions

- What are the best cost savings ideas that most companies are not taking advantage of?
- How does vehicle fleet management organization operate efficiently?
- *What is the best way to internally audit your fleet management processes and procedures?*
  - Top 100 Best Fleet Award -  
○ <https://www.nafa.org/Awards/Awards/100-Best-Fleets.aspx>
  - Leading Government Fleet Awards -  
○ <https://www.government-fleet.com/10158272/apply-now-for-the-2022-leading-fleets-award>

# Questions

*When data isn't enough how do you get buy-in from senior leadership?*

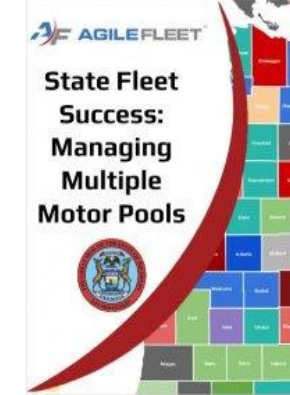
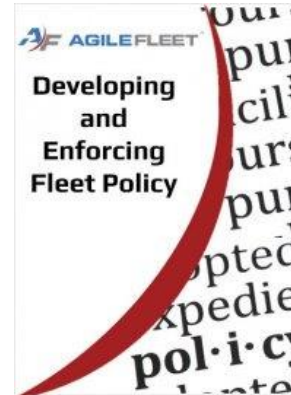
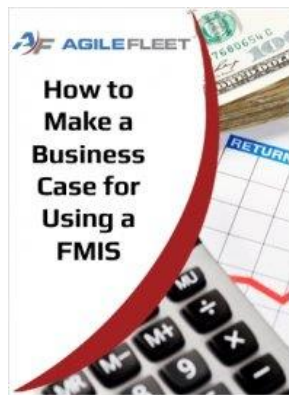


- Convince senior leadership this is *their* plan! That is, describe how it fulfills their goals for sustainability, safety, image, customer satisfaction, lowering costs, being good stewards of taxpayers' money, etc.
- Consider whether your audience is visual or whether a spreadsheet works just fine.
- Can you tell your story in 3 minutes and 1-page?
- Follow-up with me and we'll send you the full presentation that talks about the business case.

# THANKS FOR JOINING!



# Here to help!



*Ed Smith  
President  
Agile Fleet, Inc.  
(571) 498-7555 x501*

<https://www.agilefleet.com/resources>

# THE AGILE FLEET WAY™



## DISCOVERY

Learn about your fleet, challenges, goals, and culture

- Open discussion
- Review of fleet challenges, reports and audits, mandates, timelines, constraints, decision-making process, etc.
- Demo of solution

1 - 2 Weeks



## FITNESS

Mutual determination that we are a good "fit" for each other

- Identify functional and technical needs
- Check our references
- Analyze ROI
- Share Core Values
- Meet our president

2 - 4 Weeks



## PARTNERSHIP

Work together to formalize the relationship

- Comprehensive Investment Summary
- 5-year fixed-fee budget
- IT/security review, as needed
- Select procurement vehicle (e.g., direct purchase, GSA, Sourcewell, etc.)

1 - 2 Weeks



## MOBILIZATION

Get it done: It's easy!

- Kick-off meeting
- System setup
- Software in 3-10 weeks
- Hardware in +4 weeks
- Training
- Go-live
- Continue to refine business practices

6 - 14 Weeks



## SUCCESS

Succeeding Together

- Industry-leading client support
- Open dialog
- Quantifiable results
- On-going education: webinars, user group, sharing

1 - 20+ Years