

Fleet Management

Self-Assessment Guide





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A. Assessing Current Proficiency With Fleet Management



Instructions: For each question below, rank your firm’s proficiency with the topic, as well as the importance of the topic to your company. At the bottom of each section, sub-total all of the “Proficiency” boxes, and all of the “Importance” boxes.

Note: if completing this PDF on your computer, the form will automatically calculate the totals for you.

1.0 DRIVER MANAGEMENT

Scale: 1=Extremely Low 2=Low 3=Average 4=High 5=Extremely High

1.1 Driver Recruiting

We have a recruiting process in place that ensures that we hire qualified, experienced drivers and always have drivers available when we experience turnover.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

1.2 Driver Hiring Standards

We only hire drivers after they have provided documented evidence of a clean driving record and a criminal background check, commercial driving experience of 2 years and greater, and have successfully completed a road test.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

1.3 Driver Training

Both new and tenured drivers receive professional, regularly-scheduled training that ensures that they work safely, efficiently, and in accordance with regulatory requirements (eg. hours of service, pre- and post-trip vehicle inspections).

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

1.4 Driver Adherence to SOPs (Standard Operating Procedures)

Our company documents and communicates SOPs to our drivers to ensure that shipper, receiver, and end-customer expectations are being met.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

TOTAL PROFICIENCY IN DRIVER MANAGEMENT

TOTAL IMPORTANCE OF DRIVER MANAGEMENT

A. Assessing Current Proficiency

With Fleet Management (continued)



Instructions: For each question below, rank your firm’s proficiency with the topic, as well as the importance of the topic to your company. At the bottom of each section, sub-total all of the “Proficiency” boxes, and all of the “Importance” boxes.

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2.0 FLEET TECHNOLOGY AND COMMUNICATIONS

Scale: 1=Extremely Low 2=Low 3=Average 4=High 5=Extremely High

2.1 On-board Technology

We use fleet technology on our trucks and trailers such as GPS tracking, engine and fuel performance telematics, trailer tracking devices, and reefer temperature tracking and alerts (if applicable).

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

2.2 Data Analysis From GPS and Telematics Devices

We compile and analyze data from GPS and telematics devices in a systematic way to improve driver behaviour (speeding, hard braking, excessive idling) or to improve dispatch and routing efficiencies.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

TOTAL PROFICIENCY IN FLEET TECHNOLOGY AND COMMUNICATIONS

TOTAL IMPORTANCE OF FLEET TECHNOLOGY AND COMMUNICATIONS

A. Assessing Current Proficiency

With Fleet Management (continued)



Instructions: For each question below, rank your firm’s proficiency with the topic, as well as the importance of the topic to your company. At the bottom of each section, sub-total all of the “Proficiency” boxes, and all of the “Importance” boxes.

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3.0 FLEET SAFETY

Scale: 1=Extremely Low 2=Low 3=Average 4=High 5=Extremely High

3.1 Safety Policies

We have fleet safety policies that are clearly written, continuously updated, and communicated frequently with both new and experienced supervisors, dock workers, and drivers. The policies address areas such as pre- and post-trip inspections, hours of service regulations, drug and alcohol use, seat belt use, speeding, distracted driving, and driver fatigue.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

3.2 Safety Management

We have professionally trained safety management personnel who reinforce the safety policies in the office, the yard, and on the road.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

3.3 Fleet Procurement and Maintenance

We purchase equipment that improves safety with features such as anti-lock brakes, electronic stability control, lane positioning sensors, and speed limiters. We ensure that all vehicles are regularly inspected and maintained to meet safety standards.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

3.4 Vehicle Accident Emergency Procedures

When vehicle accidents happen, we have clear guidelines and procedures for drivers to follow, and trained management staff who will respond to assist the driver, deal with law enforcement officers, provide information and documentation to insurance firms, and ensure that cargo is expedited to its destination.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

A. Assessing Current Proficiency

With Fleet Management (continued)



Instructions: For each question below, rank your firm’s proficiency with the topic, as well as the importance of the topic to your company. At the bottom of each section, sub-total all of the “Proficiency” boxes, and all of the “Importance” boxes.

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3.0 FLEET SAFETY (CONTINUED)

Scale: 1=Extremely Low 2=Low 3=Average 4=High 5=Extremely High

3.5 Accident and Traffic Violation Data Capture and Tracking

We capture and track data related to accidents, traffic violations, and cargo damage or theft. We use this data to improve driver behaviour and take steps to protect our regulatory profile with provincial authorities.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5
TOTAL PROFICIENCY IN FLEET SAFETY					
TOTAL IMPORTANCE OF FLEET SAFETY					

A. Assessing Current Proficiency

With Fleet Management (continued)



Instructions: For each question below, rank your firm’s proficiency with the topic, as well as the importance of the topic to your company. At the bottom of each section, sub-total all of the “Proficiency” boxes, and all of the “Importance” boxes.

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4.0 REGULATORY COMPLIANCE

Scale: 1=Extremely Low 2=Low 3=Average 4=High 5=Extremely High

4.1 Equipment Licensing and Registration

We have clear responsibilities and processes around the administration of truck licensing registrations and renewals and keep easily accessible records.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

4.2 Permits

We have clear responsibilities and processes to stay up-to-date on permit requirements for overweight, overwidth, overlength, and overweight loads. This includes long-combination vehicle regulations.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

4.3 Provincial Commercial Vehicle Operating Rating System Compliance

We have a full understanding of the applicable provincial commercial vehicle rating systems, and regularly review our carrier rating and ratings abstracts at both an operational and senior management level.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

4.4 Seasonal Road Restrictions

We review, understand, and comply with the annual Spring Thaw regulations around road and load restrictions.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

TOTAL PROFICIENCY IN REGULATORY COMPLIANCE

TOTAL IMPORTANCE OF REGULATORY COMPLIANCE

A. Assessing Current Proficiency

With Fleet Management (continued)



Instructions: For each question below, rank your firm’s proficiency with the topic, as well as the importance of the topic to your company. At the bottom of each section, sub-total all of the “Proficiency” boxes, and all of the “Importance” boxes.

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5.0 RISK MANAGEMENT

Scale: 1=Extremely Low 2=Low 3=Average 4=High 5=Extremely High

5.1 Insurance Processes & Procedures

We regularly review our insurance programs and coverage. We have processes in place with our insurers for adding and deleting equipment, adding new drivers, issuing certificates, and addressing special needs such as single cargo trips.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

5.2 Accident and Emergency Processes & Procedures

When vehicle accidents happen, we have clear guidelines and procedures for drivers to follow, and trained management staff who will respond to assist the driver, deal with law enforcement officers, provide information and documentation to insurance firms, and respond to media enquiries.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

5.3 Corporate Risk

Our senior management and ownership understand the short-term and long-term financial risk associated with fleet operation. This financial risk can be the result of worker disability costs, property damage claims, personal injury claims, wrongful death claims, environmental clean-up costs and fines, and negative PR in the marketplace.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

TOTAL PROFICIENCY IN RISK MANAGEMENT

TOTAL IMPORTANCE OF RISK MANAGEMENT

A. Assessing Current Proficiency

With Fleet Management (continued)



Instructions: For each question below, rank your firm’s proficiency with the topic, as well as the importance of the topic to your company. At the bottom of each section, sub-total all of the “Proficiency” boxes, and all of the “Importance” boxes.

Note: if completing this PDF on your computer, the form will automatically calculate the totals for you.

6.0 FINANCIAL MEASUREMENTS OF FLEET PERFORMANCE

Scale: 1=Extremely Low 2=Low 3=Average 4=High 5=Extremely High

6.1 Fleet Metrics

We track, compile, and analyze data that is relevant to our business. This may include total fleet costs, cost per kilometer, cost per delivery, cost per case, cost per pallet, and/or fuel cost per kilometer.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

6.2 Fleet Optimization

We have the optimal number of tractors and trailers to manage weekly, monthly, or season volume surges without compromising customer service or exceeding the legal limit of driver operating hours.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

6.3 Capital Opportunity Cost

If purchasing equipment with cash, we understand the opportunity cost of capital and factor this into our purchasing decisions.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

6.4 Vehicle Replacement Strategy

We understand the lifetime cost of ownership and the relationship of vehicle age to maintenance costs. We have a formulaic approach to vehicle replacement based on maintenance costs and depreciation values.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

A. Assessing Current Proficiency

With Fleet Management (continued)



Instructions: For each question below, rank your firm’s proficiency with the topic, as well as the importance of the topic to your company. At the bottom of each section, sub-total all of the “Proficiency” boxes, and all of the “Importance” boxes.

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6.0 FINANCIAL MEASUREMENTS OF FLEET PERFORMANCE (CONTINUED)

Scale: 1=Extremely Low 2=Low 3=Average 4=High 5=Extremely High

6.5 Fleet Total Cost of Ownership TCO

We fully understand our fleet TCO which incorporates both “hard” costs (lease or interest payments, maintenance, tires, licensing, driver wages, overtime, etc.) as well as “soft” costs (administration, supervision, dispatch, regulatory oversight, accident and emergency resources, legal fees, fleet insurance, corporate risk, etc.).

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

6.6 Fleet Benchmarking

Using our Total Cost of Ownership analysis, we regularly benchmark our fleet costs against other private fleets as well as 3rd party outsourced fleet providers.

Proficiency	1	2	3	4	5
Importance	1	2	3	4	5

TOTAL PROFICIENCY IN FINANCIAL MEASUREMENTS OF FLEET PERFORMANCE

TOTAL IMPORTANCE OF FINANCIAL MEASUREMENTS OF FLEET PERFORMANCE

B. Summary

Total Score of Fleet Management Self-Assessment

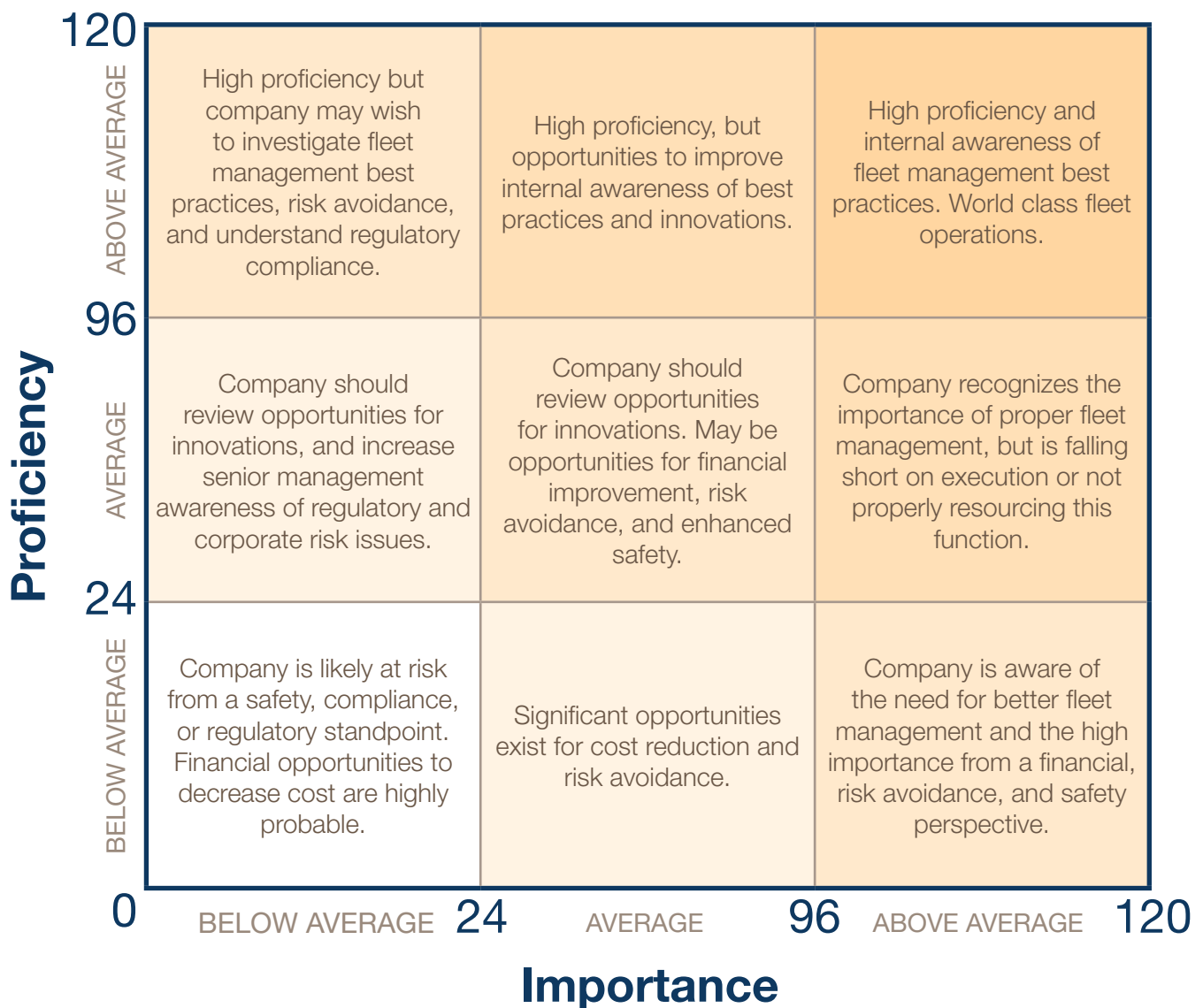
Total Proficiency in Fleet Management
(Totals from questions 1.1 – 6.6):

Total Importance of Fleet Management
(Totals from questions 1.1 – 6.6):

INTERPRETING YOUR SCORE

Using the grid below, place a dot at the intersection of your “Proficiency” and “Importance” scores.

Each section of the grid provides you with a general interpretation of where your company may stand with regards to your private fleet management capabilities.



C. Next Steps



Now that you have completed a self-evaluation of your current private fleet capabilities and areas of improvement, a critical step in weighing fleet insourcing versus outsourcing is determining your “Total Cost of Ownership” (TCO).

Your TCO will be a combination of “hard costs” (lease payments, driver wages, repairs, tires, etc.) and “soft costs” (administration, management time and attention, risk and liability, etc.). The soft costs are harder to quantify, but are important to understanding your complete fleet investment.

To assist you in calculating your TCO, Canada Cartage has developed a Private Fleet TCO Calculator™. This tool will help you to identify both the hard and soft costs of fleet management, and provide you with a benchmarking tool to help you make a decision. Contact your Canada Cartage sales executive to work with you on the TCO Calculator™. If you do not have an assigned sales executive, contact us at info@canadacartage.com, or [click here](#).

ABOUT THIS GUIDE

This guide has been developed to provide senior management with tools to self-assess and evaluate your current fleet management proficiency. The guide is an accompanying document to Canada Cartage’s Fleet Outsourcing Evaluation Guide and Private Fleet TCO Calculator™.

ABOUT CANADA CARTAGE

Founded in 1914, Canada Cartage is the country’s largest provider of outsourced fleet solutions, providing dedicated equipment and drivers to both small and large firms. Canada Cartage also provides a complete range of supply chain and logistics services under our subsidiary companies including Direct Distribution Centres, Direct2Home home delivery services, and non-asset based transportation management through our Vanguard Global division. For more information, visit www.canadacartage.com.

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