

# Ready, Plan, Go!

## 5 Steps to Successfully Launch Your Next Initiative

By Michael Wagner

**T**he fleet industry is in constant motion — everything from government regulations to manufacturer supply constraints and labor challenges. It is vital for fleet operations to stay adaptable and prepare for the future to stay competitive and still provide exceptional services to their communities, internal clients, and all other stakeholders.

A best practice for fleets is to develop a standard operation procedure (SOP) for initiative and process implementation, which help considerably with resistance to change and instill creativity, adaptability, and progressiveness. There are many initiatives that fleets undergo such as:

- Fleet Management Information System (FMIS) changes
- Acquiring or transferring facilities
- Procuring new vehicles and equipment with non-standardized specifications
- Training technicians to work on newer equipment
- Learning to do more with less due to labor constraints

What we're going to do now is walk through a best practices timeline to show the importance and benefit of creating and implementing a standardized initiative implementation process.

### STEP 1 Evaluate Current State

The first step in developing a fleet initiative is understanding your current operational state and identifying why you are seeking a new or modified process. The success of an initiative

weighs much on this first step, as you must be fully transparent and honest about your current state. Sometimes it can be challenging to be honest with yourself or others about why things aren't working or how negatively impactful a process is on your fleet personnel or stakeholders. A word of advice here is to not sugar-coat data, qualities, or characteristics about where you are. Just be honest and professional.

Some of the key factors to look at when examining your current state include:

- How does our current system operate? Are we effective, productive, and efficient?
- What are we good at, and what are areas with room for improvement?
- Why are we seeking change or a new process?
- How do our employees feel about our current situation? (Operations, morale, culture, productivity, workflow)
- If we were to change or implement a process, who would it impact? (Internal stakeholders, external stakeholders, communities, industry)

- Do we have the resources to implement the initiative, or will we require guidance or additional resources?

These are all questions you will focus on to develop a comparative list of pros and cons. Really look at what you're doing that works, maybe what doesn't work so well, then the category of areas you've already identified that need some improvement. You may also seek out templates or resources on SWOT Analysis charts, PESTEL charts, Fishbone Diagrams, and Cause and Effect Charts to better understand where your fault points are, which will then help you develop a better initiative.

### STEP 2 Envision Future State

Now comes the formal process of writing down your future state. This is when you're envisioning how great it would be to see the successful outcome of a new initiative and its implementation process — the reduced costs, the faster flow of materials, product, and work, and a boosted morale amongst personnel because of celebrating the small and big wins that got you to that point.

The truth is, much of the time we envision future states that we can obtain, but we don't implement and plan for the initiative in a manner that sets us up for learning and success. When writing down your desired future state, make sure you track the following:

- An estimate of reduced or improved finances
- The desired productivity level of employees, vehicles, and equipment
- How you want it to benefit the stakeholders (internal and external)

- How the systems operate to reduce wastefulness in processes
- What personnel and resources it took to make the initiative a success
- How it impacts the fleet across a 1-, 3-, and 5-year timeline

To develop a plan, you must acquire and document data. This may be anything from qualitative data such as characteristics and qualities of your fleet process of your desired future state as well as quantitative data such as telematics information, budgeting costs and financial projections, or even technician productivity levels. In essence, this is setting your key performance indicators (KPIs) that you will track throughout your initiative implementation so you can gauge your progress and performance.

### STEP 3 Develop a Plan

The next step in the process is developing your plan. Now that you understand where you are and where you want to go, you need to determine who will help you get there and how. Examine your personnel within the fleet, as it will be dependent on the initiative you're trying to implement. Here's a few scenarios to work with.

#### EXAMPLE: Fleet Management Information System (FMIS) Implementation

Include individuals who are directly impacted by the system, as well as those who will be champions to others in the process, such as:

- Fleet manager
- Fleet supervisors
- Fleet administrators
- Lead fleet technicians
- Parts managers or lead parts technicians
- Information technology specialists
- Procurement specialists

#### EXAMPLE: Preventative Maintenance Plan Changes

Let's say you're changing how equipment and vehicles are scheduled for preventative maintenance work. You may involve:

- Fleet manager
- Fleet supervisors
- Fleet administrators
- Lead service technicians



**The truth is, much of the time we envision future states that we can obtain, but we don't implement and plan for the initiative in a manner that sets us up for learning and success."**

- Department managers (outside fleet) who direct vehicle routing, equipment assignments, and driver responsibilities

These are only two scenarios, but as you can see, you will identify and involve the personnel directly impacted by the initiative changes and who will be involved in and make an impact on the initiative as well.

Work with this team to brainstorm how you can reach your future state. Discuss who's accountable for certain processes and change. Structure timelines and milestones of goals, set goals, and work on smaller objectives between goals. Assigning roles and responsibilities up front is important, as well as setting expectations for the team. Many times, the team leader will be the fleet manager or director in an initiative implementation within a fleet, so it's important for them to have the tools they need to hold everyone accountable along the way.

Another helpful way to keep everyone on track and support good communication is to ensure everyone knows how to contact each other. Simple and streamlined communication aids in reducing resistance and frustration as team members run into challenges or roadblocks along the way. And lastly, you will want to set up future meeting dates so that the team can set their

individual expectations, as well as plan and come prepared to any meetings. By the end of your planning, you should have an initiative implementation plan which includes:

- What the initiative is
- Who is part of the team and what are their roles in the implementation
- What is the desired state, end goal
- What are your milestones and goals along the way
- What objectives do you have to achieve your goals
- When meetings are taking place
- How to approach challenges and who to address them with

All of these are vital components of an initiative plan, and if set in place at the beginning of implementation, you will have a better chance of being more successful as you move forward.

### STEP 4 Take Action

You did the planning, and now you go! It's time to put the wheels in motion and begin implementation or change of the initiative. As the implementation process begins to take effect, focus on a few objectives of your own as being the team leader or implementation leader. You want to keep accessible and frequent communication with team members at the forefront, as well as working with those individuals to be empowered along the way. Don't feel like you must solve problems yourself or that others don't have the authority to make decisions. Work with team members to know they are supported and responsible for their role in the initiative and assure that you will work with them when issues arise that they're not able to solve on their own.

Tracking progress will be very important, especially as you're observing the effects of the initiative implementation. Remember we discussed our KPIs? You need to pull those KPIs out and begin evaluating your progress and observing the changes in quantitative and qualitative data. Make sure you keep an open mind, as you may learn that you need to add or change KPIs to ones that give you the data feedback you want to better evaluate the performance or progress. It's important though to not switch them up frequently, as

sometimes change takes time and it may not be that it's not providing you with the answers you're looking for, but it may be that the implementation isn't going accordingly. Do your best to evaluate this and refer to KPIs frequently.

A final note for this section is to be aware that a member of the team may not be suited for the initiative implementation, and you may need to make personnel changes throughout the process. Not everyone is prepared to handle some of the challenges that come with initiative implementation such as frustrated personnel, system constraints, or feeling overwhelmed as they're still performing many of their normal duties. This is why good communication is so important throughout the process because it builds trust with the team members so if they have concerns, they can discuss them with you sooner than later — before they build into larger problems.

## **STEP 5** Analyze Your Progress

You made it to the end, and now it's time to analyze your performance and progress. At the final milestone and project completion date, review the results with your team. Bring your notes and go through the timeline of events so they can see the whole picture. Look at:

- Current operational state (first step)
- Desired future state (where you wanted to be)
- Your KPIs of before and after

Go through these key items with your team to look at how the team performed, what they can do to continue and improve performance, as well as what they learned throughout the initiative implementation. This is a great meeting to have as a debriefing of the process where you can discuss successes or what can be done better the next time you go through an initiative implementation.

As you're analyzing the performance and feedback from the team, also keep in mind who was successful in their roles and responsibilities, and who maybe struggled a bit. We don't want to assume that someone won't be on the team for the next initiative, but understanding where they may need additional training or coaching and who may be best suited for that will set up those individuals for success.

Finally, consider how you will take your results and turn them into standardizing the process to build upon and focus on continuous improvement. Work with the team to show that there's always room for improvement and encourage them to continuously refine processes throughout the future.

## **Summary**

As you can see, no matter if the initiative you're planning is big or small, it takes some time and work to make it a reality. Nonetheless, you must always remain prepared to learn and adapt at any time, knowing that you may be challenged with constraints or problems along the way.

Also, remember that the chances of success and the impact of the outcome are only going to be as good as the effort

that goes into it. As you move through the implementation of more initiatives and develop a sound standard operating procedure (SOP), you will find that the personnel, teams, and all other fleet personnel become more open to change and are finding new ways of doing things that improve the entire operation. Be creative and open-minded to the ideas and feedback of others, and you can become an unstoppable organization. **FS**



**MICHAEL WAGNER, MBA, CAFM, CSP, ASM, ASCA-C,** is director of company operations with *Designscapes Colorado*. He is also owner/consultant at *ExBet Advising, LLC*.

**NO MORE COSTLY DOWNTIMES,  
NO MORE DELAYS,  
ENSURE YOUR VEHICLES RETURN EVERYDAY**

**Battery Guard® 1000**  
Automatic Low Voltage  
Battery Disconnect



Scan to learn how the BG1K can save your company time and money

 **Intellitec**

intellitec.com  
sales@intellitec.com  
(386) 738 7307