

Strategic fleet planning roadmap

Thinking about planning your fleet goals for the year? While every fleet is different, below is a general roadmap outlining the 15 tasks that will help you accomplish your fleet goals. Call a LeasePlan expert at 855-588-3677 to help you start mapping out a plan. Or visit us online at www.leaseplan.ca.

January

1. Initiate spring ordering cycle & LCCA

If you order vehicles in the spring, run a lifecycle cost analysis (LCCA) to start the process. Running an equity analysis can help you with your ordering cycle as well.

February

2. Run MVR checks & assess risk policy

As a best practice, run a motor vehicle record (MVR) check on your drivers annually. This should be done prior to ordering to ensure drivers are still eligible according to your policy. MVRs can also reveal driver safety training needs. While you're at it, review your risk management policy for possible cost savings.

3. Review licence & plate data*

Pull a report of licence and registration data to find any gaps in plate and registration information. Fill in any missing information and address anything past due.

April

6. Audit your data*

Run a report of your active vehicles to reveal any gaps in your fleet's data. Check for missing information such as plate numbers, driver addresses or VINs.

5. Update key contacts*

Check in with your fleet partner to make sure your company's key contacts on file are correct and accurate. It can ensure the lines of communication stay open.

March

4. Review year-end fleet performance

Take a look at your fleet's performance year-over-year to evaluate trends, spend and inventory. Doing so can help identify cost savings or any anomalies that may be costing you extra money. Review performance with your fleet partner in Q1 for the previous year.

May

7. Review your fleet policy*

Make it a point to review your fleet policy at least once a year. Does your policy cover everything you need to safeguard your company? A quick audit could reveal anything that's missing.

June

8. Run an equity analysis

You want to find out what the projected gain or loss at resale will be. Running an equity analysis will help you determine this before deciding to sell.

July

9. Start fall ordering & LCCA

If you order vehicles in the fall, run an LCCA to start the process. An equity and replacement analysis can help you with your ordering cycle as well.

September

12. Review maintenance parameters

Work with your fleet partner's maintenance team to decide if your authorization parameters are set appropriately. Are they too high or too low? This is also a good time to review your policy on winter tires as the season is approaching.

August

11. Prepare for PMR

The end of the reporting year for personal mileage is approaching. At this point, make sure you have all the information you need to communicate with your drivers. Are drivers reporting their mileage? Evaluate your personal use charge going into the new reporting year as well.

10. Check performance at mid-year

Six months into the year is a good time to check in and see if you're on track to meet your fleet performance goals for the year.

October

13. Plan next year's initiatives

Are there any major initiatives you'd like to focus on in the coming year? Sustainability, budget issues, etc. If so, work with your fleet partner to help you get in front of these goals before the new year.

November

14. Run an equity analysis

It's daylight saving time, where you gain an hour. Are you using the extra time to your advantage? In preparation for your spring ordering cycle, maybe run an equity analysis. Or evaluate the cash flow of your fleet costs.

December

15. Take a breather

Take time away from all these tasks over the holidays. Relax and enjoy your family. You'll be refreshed and ready to hit the ground running in 2018!

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*These tasks can be done at any point in the year when it fits your schedule. These are typically ongoing tasks that should be revisited frequently.