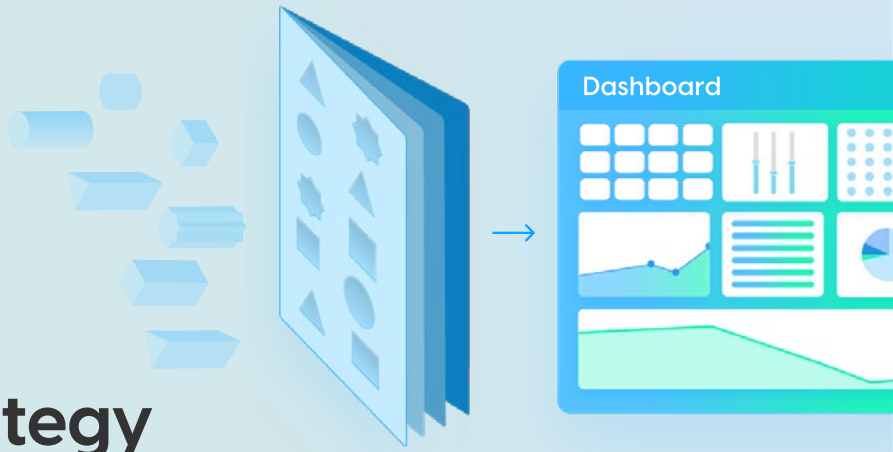


Planning Checklist

Data-Driven Fleet Management Strategy



This comprehensive planning checklist is designed to guide you through the essential steps required to establish a unified fleet management system that consolidates data from across your operations.

Follow this structured roadmap to create a single source of truth that enables real-time decision-making, automates critical processes, and drives continuous improvement in fleet performance, cost control, and operational efficiency.

Outcomes & KPIs

Pick **3-5 business outcomes** (e.g., ↓ Cost/Mi, ↑ Uptime, ↓ Incidents).

Define **5-6 KPIs** with formulas, owners, and baselines (e.g., Utilization%, Idle%, PM Compliance%, Cost/Mi).

Ownership & Alignment

Name an **executive sponsor**, an **operations product owner**, and a **project lead**.

Confirm a small **steering group** (Ops, Maintenance, IT/Data, Security/Privacy, Finance).

Current State Snapshot

List **core systems** (telematics, CMMS, fuel/EVSE, TMS/ERP/CRM, DVIR/safety) and **who owns each**.

Capture top **pain points** (swivel-chair effect, data mismatches, slow response).

Data Access & Standards

Secure **read-only access or 60-90 days of sample data** from key systems.

Set system **inventory & access method** (API/webhook/SFTP/DB view).

Agree on **time/unit standards** (UTC timestamps; mi/km, gal/L, kWh, currency).

Unified View (One Dashboard)

Align on the **entities to join** (vehicle, driver, trip, work order) and **must-have views** (utilization, maintenance, safety, fuel/energy).

Decide **what's real-time vs. batch** for the pilot and the **initial sequence** (which feeds first).

Decide on an **Integration Approach (Lightweight)**

Security & Privacy

Confirm **SSO/MFA**, role-based access, encryption; document **Personally Identifiable Information (PII) handling**, and get privacy/legal **pilot approval**.

Turn on **immutable** access/change logs, and schedule a recurring periodic review.

Pilot Slice & Success

Choose a **pilot scope** (one region/vehicle class or ~50-200 vehicles).

Set **60-90-day targets** for the KPIs and 2-3 **automation loops** (e.g., fault→work order, low battery→charging plan).

Resources & Budget

Reserve **Ops/Shop time** for testing; line up budget for integration and training.

Change & Communication

Draft a **simple comms plan** and **role-based job aids**; identify reports you'll **replace** with the dashboard.

Quick Exit Gate (start build when all are true)

Use cases + KPIs agreed with baselines/targets

Security/privacy cleared for pilot

Access to pilot-scope data (60–90 days)

Pilot slice + success measures set

One-dashboard scope (entities & views) aligned

Time/budget secured

Ready to benefit from your digital fleet? **Book a meeting now**