Whether you’re a student, a Fleet leader, or an executive with a Fleet in your organization, this will redefine your success. With these customer service fundamentals, integrated best practices, and business tools, you will be able to exceed all expectations.

• Use the enclosed questionnaire to quickly identify opportunities where your Fleet may be able to improve.
• Learn how to provide exceptional services and achieve lower costs—and why these aren’t mutually exclusive.
• Become customer-driven and avoid the common pitfall of a primary focus on technology, equipment, and services.
• Stop trying to manage customers. Instead, learn how to work cooperatively to support effective decision-making.
• Learn the important role of win-win results in the service provider’s “Hierarchy of Success.”
• Recognize the critical role of effective teamwork.
• Revisit core equipment management fundamentals.
• Manage customer perception and service experience.
• Create opportunities for yourself, your team, your customers, and the overall organization.

BONUS
An Employee Performance Appraisal Communication Tool
Fleet Services
Managing to Redefine Success

A Breakout Customer-Driven Business Model to Thrive
Other SAE books of interest

Analytical Fleet Maintenance Management, 3rd Edition
By John E. Dolce
(Product Code: R-371)

By John E. Dolce
(Product Code: R-332)

For more information or to order a book, contact:

SAE INTERNATIONAL
400 Commonwealth Drive
Warrendale, PA 15096

Phone: +1.877.606.7323 (U.S. and Canada only)
or +1.724.776.4970 (outside U.S. and Canada)
Fax: +1.724.776.0790
Email: CustomerService@sae.org
Website: books.sae.org
Fleet Services
Managing to Redefine Success
By Tim C. King
Table of Contents

Foreword .................................................................................................................... vii
Preface .......................................................................................................................... ix
A Note to Experienced Fleet Professionals ............................................................... xi
Acknowledgements ..................................................................................................... xiii
Prologue ....................................................................................................................... xv
Glossary .......................................................................................................................... xvii

PART I Introduction ....................................................................................................... 1
Chapter 1. Opportunities and Strategies Overview .................................................... 3
Chapter 2. Fleet Opportunities Test ............................................................................. 9
Chapter 3. Common Requirements for Success ....................................................... 13

PART II It's All About the Customer .......................................................................... 17
Chapter 4. The Role of the Customer ........................................................................... 19
Chapter 5. Defining the Customer ................................................................................. 25
Chapter 6. Identifying Your Core Customers’ Needs and Wants ................................ 31
Chapter 7. Background Requirements – Indirect Expectations .................................. 39

PART III Business Plan Direction .............................................................................. 43
Chapter 8. Redefining Opportunities .......................................................................... 45
Chapter 9. Effective Goal Setting ............................................................................... 53
Chapter 10. A Triple Strategy Approach ...................................................................... 61

PART IV Best Practices ............................................................................................... 67
Chapter 11. Equipment Management .......................................................................... 69
Chapter 12. Service Strategies ..................................................................................... 87
Chapter 13. Customer Experience Management ........................................................ 97
Chapter 14. Relationship and Behavior Strategies ..................................................... 103
Chapter 15. Information and Communications .......................................................... 111
Chapter 16. Teaming with Customers ......................................................................... 121
Chapter 17. Fleet Total Cost Management .................................................................. 129
PART V  Supporting Business Tools..............................................135
  Chapter 18. Accurate Equipment Inventory ..................................................137
  Chapter 19. Accounting and Reporting Instruments........................................141
  Chapter 20. Performance Measures and Benchmarking .................................147
  Chapter 21. Fuel Management and Equipment Scheduling .........................159

PART VI  Integrated Directions.....................................................163
  Chapter 22. Strategy Integration Review.......................................................165

PART VII  Leadership.....................................................................175
  Chapter 23. Better Decision-Making .............................................................177
  Chapter 24. Planning and Sustainability .......................................................185

Appendix A – Individual Performance Report Card .........................193
Appendix B – Leasing versus Purchasing.............................................197
Index ........................................................................................................203
About The Author .............................................................................215
Foreword

I have known Mr. Tim King for over 25 years. He worked for me when I was a manager of a major gas and electric utility fleet. He is an outstanding leader. After I left the fleet business to go into utility operation, Tim became the Fleet manager. With his master’s degree in business administration and background as a licensed mechanical engineer, he has experience in vehicle and equipment design, fleet management, accounting and life cycle analysis, cost accounting, process improvement, labor management, as well as customer service consulting. As I read his book, it reminded me of the history of his management of a large fleet. He has had an outstanding and very noteworthy career. Tim’s passion is developing and facilitating customer service excellence.

I have managed fleet professionals for most of my 30 years in the utility business. As an operations vice president of a large utility company, I would expect my fleet professionals to read this book. It has all the information needed to run a fleet organization. I have read other books on this subject, and this is the first one that has a keen focus on operations, cost management, leadership, and customer service. I see this book as an educational text for operations management. It should be required reading for any fleet management certification.

This book offers a modern addition to the previous books in the industry. The time has come for an updated real-world book that will help fleet professionals excel in their profession. By following the teachings in this book, they will be thoroughly equipped to create a successful fleet organization. The customer service, business planning, best practices, use of business tools, and required leadership teachings in this text will add to any fleet professional’s success in the industry.

The book’s structure and flow of information are exceptional. The seven parts in the book lay out a comprehensive order to follow. The layout also allows the reader to go to individual parts of the book to find specific information and teachings. For example, if I wanted information on business planning and direction, I would go to Part III, which contains exhaustive information on that topic. Understanding this material would allow me to generate my fleet goals.

Finally, a text has been written that will help fleet professionals control costs and increase customer satisfaction!

Francis “Frank” P. Gonzales
VP, Electric Delivery
NV Energy
January 2015

A note from the publisher: Mr. Gonzales retired from Nevada’s Army National Guard in September 2013 as a Major General, the State of Nevada’s highest ranking Guardsman. During his distinguished 36-year career in the military, he rose through the ranks and served a tour of duty in Iraq. Upon retirement, Mr. Gonzales was awarded the Distinguished Service Medal.
Preface

The provision of specialized complex support functions—such as vehicle and equipment services—relies on a wealth of ever-increasing technical knowledge and expertise. This technical knowledge is often seen as so instrumental that it frequently distracts from customer service and operations management fundamentals. Add to this the evolution of technology, equipment, and associated requirements are often the only changes that are made to the way services are provided. Most organizational and industry change is also driven by this process. The typical internal industry focus of many service providers only serves to perpetuate this limited perspective.

While historically well-founded and widely accepted, these traditional characteristics preclude a number of undiscovered opportunities, which, combined with a leader’s requisite ambition, openness and willingness to change, can enable a service provider to attain a level of success previously unimagined by anyone.

This is the subject of this book.

Three aspects of this business model are important for the reader to realize upfront. First, these contents don’t detract from the need for technical expertise. Rather, this book assumes that leaders reading this either already possess this knowledge or have easy access to it—through their coworkers and staff, or through the proliferation of vendors and other information sources that are readily available today.

Second, while aimed at fleet services support, the insights are equally applicable to many of today’s specialized customer services, and in many respects, to individuals as well. From fleet services to information technology, this book can provide insight and direction to leaders seeking solutions.

Third, for some readers a principal challenge will be to overcome their own preconceptions or biases. These may be regarding the credibility of the opportunities and strategies, perceived limitations with their own business environment, or just the scope of the change and effort involved. The author can relate. Neither I nor anyone I worked with could have imagined the results we ultimately achieved. So I can fully understand how a reader might react skeptically to what is presented here.

There were two principal reasons for writing this book. The first was to present information facilitating both an understanding and an appreciation of the possibilities for success. The second was to provide both a foundation and motivation for the implementation of this knowledge and subsequent accomplishment.

Regardless of how you apply this knowledge, I hope you’ll find this book both interesting and informative. Its aim is to provide sufficient impetus to embark on a journey of discovery and success—for you, your organization, and your customers.
A Note to Experienced Fleet Professionals

With a text that incorporates phrases such as “breakout opportunities and strategies,” and “a goal to thrive” in the title, I understand that for some readers this may present credibility concerns at the outset. But, these terms are realistic and accurately characterize the subject matter of the text. These concepts are often completely outside one’s personal experience, and thus, they may be unfamiliar or just too incredible for some fleet professionals to believe.

I briefly considered titling this book Secrets to Privatizing Fleets Successfully. A contrary approach such as this might spark interest where there would otherwise be skeptical disregard. But since my goal is to help struggling Fleets avoid being privatized, my conscience refused to let me do it. I don’t want to deceive; the objective here is to help those searching for answers find success. It is also to help readers avoid the time and effort it took to identify and then implement these successful strategies. And, I didn’t want to have to dumb it down to do it.

On the other hand, I recognize that we must all be skeptics. The industry is constantly bombarded with products and services that claim to produce significant savings or other benefits. It is part of a leader’s job to sift through these claims for those that are based in fact, and discard everything else.

As a result, this may be one of those cases where the reader would be best advised to read further. If you don’t, it could be an expensive mistake - not only for yourself, but also for your coworkers, your customers, and even your organization. This statement may also be hard to believe, but again, it’s true. How can you judge the merit of these opportunities if you do not know what they entail -- especially if they incorporate best practices with proven results? This is the real deal; if you are up to it, these opportunities actually exist.

Once you understand the break out business model presented, you will have the opportunity to judge it for yourself. But this is only the beginning if you hope to realize the benefits. Incorporating these directions will involve significant challenges. They will require both bold leadership and a long-term commitment.

This is to encourage those who might otherwise dismiss this book out-of-hand, based on their skepticism, to continue reading. Chapter 2 may be of particular interest. It provides a brief questionnaire aimed at quickly identifying opportunities for Fleets. If any are indicated, this book provides answers to how to achieve them.

While the concept of a break out business plan to thrive may be a stretch, you’ll learn how this can maximize opportunities and success – for yourself, your Fleet, your customers, and the overall organization you may be part of.
Acknowledgements

This text represents a sum of the knowledge and experiences of many contributors, both internal and external to the Fleet organization. It attempts to capture and share what our Fleet learned during my career for the benefit of others.

First, I’d like to recognize and thank my wife Christine for her encouragement, support, and endless patience with this effort.

I also owe a particular debt of gratitude to Frank Gonzales who – as a friend, combined with his leadership, support, and mentorship – enabled this knowledge to be gained and implemented, in addition to encouraging me to continue the quest for excellence – including the publication of this book.

I’d also like to express my appreciation to both Ted Griffin and Brian Costello for their friendship and invaluable support.

Leaders that directly facilitated this effort were Jeff Ceccarelli, Bill Clarke, Glade Dursteller, Herb Goforth, Joe Gremban, Walt Higgins, Peter Konesky, Judy Kossow, Gary McDonald, Jeff McKenzie, Joe Pellissier, Tom Pietropaolo, Tom Rich, Mike Smart, Gary Smith, Stan Thomas, Phil (Tex) Stappart, and Steve Thorsen. Others included: Peter Konesky, Bob Lewis, Rudy Milabar, and Austin Stedham, to name a few. Similarly, a number of other individuals were instrumental as well, including Jim Ancho, Roger Austin, Chuck Belton, Bill Bour, Dave Hage, Jim Hawkinson, Dale Huntsman, Rob McMullen, Ron Moore, Allen Roberts, Lawrence Salerno, Carl Shoemaker, Vern Smith, Vincent Stewart, Dean Williams, and the entire Fleet staff. Internal customers that played key roles in these accomplishments include Bruce Bullock, Carol Heston, Craig Pinneo, and Bruce Rice. External contributors include Thomas Osborne, Bill Golding, Jerry Halstenrud, Norma Havens, Chris Shaffer, Joanne Tucker, and others too numerous to mention.

My particular gratitude belongs to SAE International. First, to Monica Nogueira for recognizing the value of the content and assigning Robert Makowski to this project who championed this from the beginning and was instrumental in its production and support. Other key contributors included: Ashleigh Faith, Terri Kelly, Jaime Maxwell, Mandy May, Ryan Pristow, Bill Schall, Wayne Silvonic, and Heather Slater. They all demonstrated customer service excellence.

Two reference materials contributed significantly to the contents presented, and I greatly appreciate them allowing me to utilize these sources.

The first is a description of customer service from the Preface to the book *Operations Management – Continuous Improvement* by authors Richard J. Schonerger and Edward M. Knod, Jr, published by McGraw-Hill Education. This was a text in my MBA curriculum and added substantial inspiration and knowledge during my career.

The second comes from Rob Steigerwald, Chief Operations Officer, The Americas – Western Region
Marriott International, Inc. who graciously allowed me to include the 12 Hospitality Guidelines with managing customer experience. He developed these in conjunction with associates from all levels of organization when he was the general manager of Marriott’s Harbor Beach Resort in Fort Lauderdale, Florida. These add substantial insights into effective customer service and managing this important element.

I would also like to thank Charlie Rose for his interview with Dustin Hoffman on PBS TV in 2012, which provided the inspiration to overcome an initial obstacle in the early stages of writing this book.

The guidance, support, and contributions of all these individuals, organizations, and resources made this effort possible. Thank you.
Prologue

FLEET SERVICES—Managing to Redefine Success

This book identifies a breakout business model for leaders to optimize their opportunities and success— for themselves, their employees, their customers, and organization as a whole. With a customer-driven back-to-basics approach providing customer service and operations management insights, outside the typical traditional technical focus, this text shows leaders how to achieve lower costs and enhanced service quality, improved perceptions, along with win-win results exceeding everyone’s expectations. It’s all about learning how to thrive while providing customer service.