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# The **Ultimate Guide**
## TO FINDING YOUR IDEAL
# **Fleet Maintenance Software**

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# Fleet Maintenance Software

## How do you determine the right fleet management technology for your fleet?

How do you find the one that will give you the data, tools, templates, reports, and options that you need without the headaches that will make your job more difficult?

The right fleet management system can make your job and your fleet a thousand times better and more efficient—or it could create complete chaos.

To ensure you get the right kind of system, you need to understand your options in the market, and then focus on the right considerations to narrow down your choices and help you secure the perfect system.

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# Your **4** Options in the Market

Depending on fleet size, sophistication, and industry of your organization and fleet operation, you'll have a few different options in the fleet management system marketplace.

## ❯ 1. Telematics

Telematics tools often offer some fleet maintenance abilities that could function well for your fleet—depending on its size and the information you need to have.

Telematics maintenance systems offer Daily Vehicle Inspection Reports (DVIRs) and basic preventive maintenance features, and are generally seen as a service log.

If you're looking for more robust features, you'll be left wanting more. Often, telematics companies will partner with a fleet maintenance software to give you the best of both worlds.

## ❯ 2. Work Order Management

Made for smaller fleets, these tools focus on the shop and the work being done to your assets. Beyond that, work order management tools don't provide a great deal of insights into things like the financials of assets over time, fuel tracking, depreciation, capital costs, licensing, etc.

## ❯ 3. Enterprise Resource Planning (ERP)

Your organization may already have an ERP in place that you might believe you could leverage. It's a centralized management system that allows companies to monitor operations.

Fleet management is typically an add-on feature for ERPs, and therefore has limited functionality. It is built by software engineers and product managers with no fleet management experience. This may work for smaller fleets, but is unlikely to provide the needed features and abilities a large fleet requires.
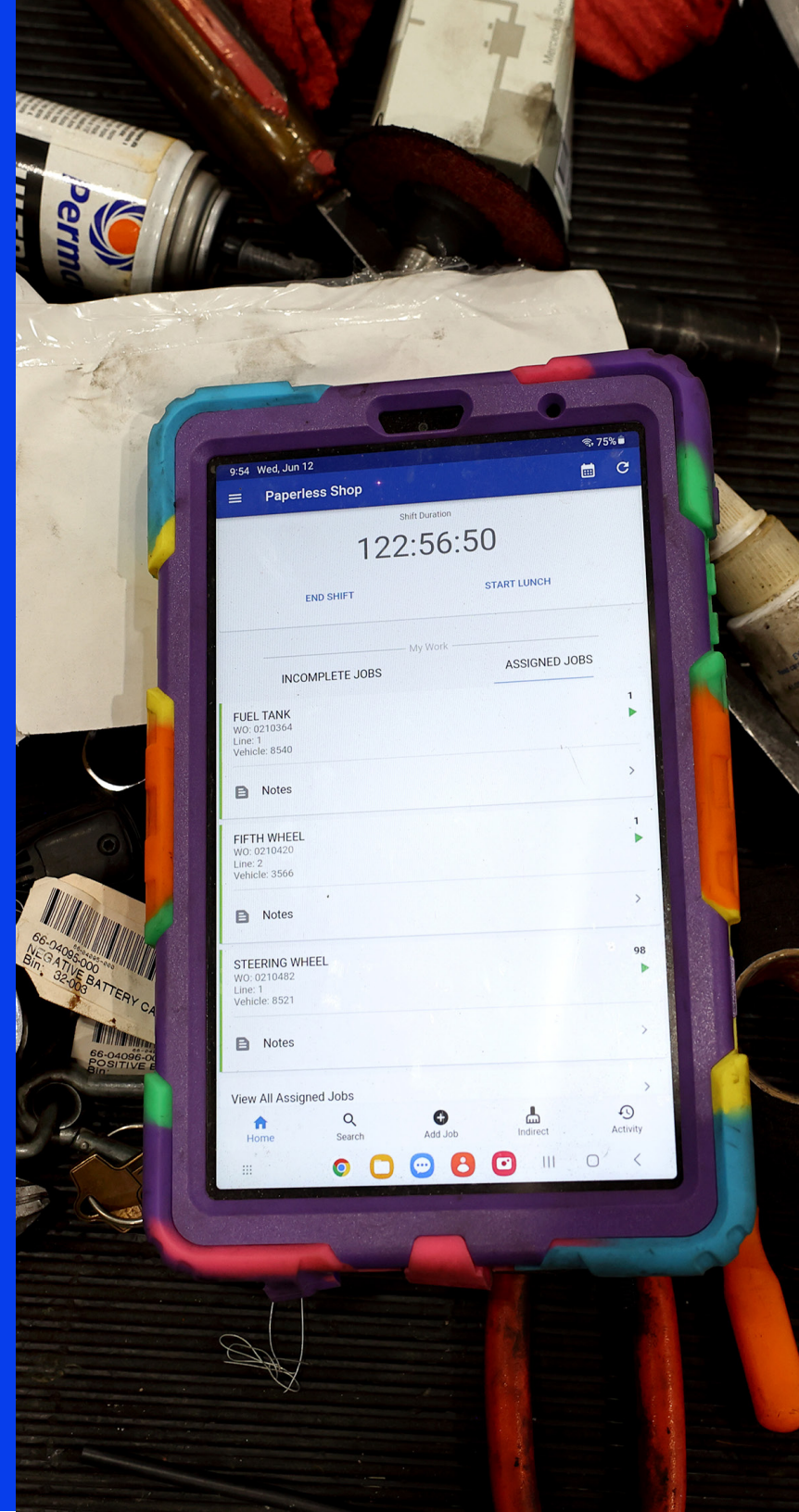
## ❯ 4. FMIS

This is your 360° view of your entire fleet, from soup to nuts.

Fleet management information systems (FMIS) or fleet management systems (FMS) are purpose-built ERP systems for fleet management that serve as the centralized asset management solution for all of your vehicles, assets, equipment, and tools. You'll get access to the most intricate and detailed vehicle and cost information, along with:

▶ **Asset management**

▶ **Accident management**

▶ **Utilization management**

▶ **Parts management**

▶ **Fuel management**

▶ **Motor pool management**

▶ **Fuel site management**

▶ **Facilities management**

▶ **Maintenance and repair management**

▶ **And more**

If your fleet is 50+ assets, you have an appropriate budget, and you want a system that is purpose built for complete fleet management, you'll want an FMIS for your fleet.

Now you can start focusing on the key aspects that are most important to you and your fleet to help you drive success.

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# Business Requirement Matrix

Create a clear understanding of the features, functions, abilities, specifications, and customizations that are most essential to the smooth and successful running of your fleet. Below, is a preview of our **free Requirements Matrix template**:

| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | **Category:** | **General System Functionality** | | **Available?** | | | |
| 2 | **Req #** | **Requirement** | **Priority** | **Yes** | **Yes w/ Mod** | **No** | **Comments** |
| 3 | | Accident Management | | ☐ | ☐ | ☐ | |
| 4 | | Asset Management | | ☐ | ☐ | ☐ | |
| 5 | | Work Order Management | | ☐ | ☐ | ☐ | |
| 6 | | Preventive Maintenance (PM) Management | | ☐ | ☐ | ☐ | |
| 7 | | Shop Management | | ☐ | ☐ | ☐ | |
| 8 | | Warranty Management | | ☐ | ☐ | ☐ | |
| 9 | | Motor Pool Management | | ☐ | ☐ | ☐ | |
| 10 | | Shop Schedule Managmeent | | ☐ | ☐ | ☐ | |
| 11 | | Mobile App Access | | ☐ | ☐ | ☐ | |
| 12 | | Integrations (APIs, Telematics, Fuel) | | ☐ | ☐ | ☐ | |
| 13 | | System Training (online, onsite) | | ☐ | ☐ | ☐ | |
| 14 | | Single Sign On (SSO) | | ☐ | ☐ | ☐ | |
| 15 | | Access to Fleet Experts | | ☐ | ☐ | ☐ | |
| 16 | | End-of-Period Processing | | ☐ | ☐ | ☐ | |
| 17 | | Service Requests | | ☐ | ☐ | ☐ | |

**DOWNLOAD TEMPLATE**

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## › Expertise

How important is it to you that the fleet management system you use is actually built by fleet managers? Would it be helpful if your FMIS employed fleet experts who can provide deep insights and ideas based on their years of hands-on fleet management experience?

Consider the level of expertise your FMIS provider can offer you and your team. This could be as simple as on-demand advisory to formalized consulting engagements. The FMIS provider's advisory and consulting can make a massive difference the in the level of success you experience, both in measurable return on investment and career advancement. Look at their executives and experts, their thought leadership and support in the fleet space. Think about how important that is to you and add it to your business requirement matrix list.

Similarly, if your organization participates in a purchasing cooperative like Sourcewell, see if the providers you are considering are on their approved vendors list so you can avoid a lengthy Request for Proposal (RFP) process. If they are a part of the cooperative, then that shows a level of trust and expertise you can rely on, as well as confidence that you are getting the best possible pricing.

Make sure that the FMIS provider you choose is aware of your team's processes and workflows and have them show you that their software can fit in and enhance those processes and workflows.

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## ❯ Implementation Process

This is an interesting one as it actually swings both ways:

### FMIS provider:

How much time and energy will it take to implement a new system? What support does the FMIS provider offer, and what does the timeline look like? Some providers say implementation can take as little as 45 days, and some as much as six months. Can they meet your timeline?

Additionally, what onboarding and training options do they offer? Do they offer ongoing training, and training aimed at the different roles in your fleet (technicians, parts, data analysts, etc.)? At the end of the day, you want to select a provider that will serve as a partner to you so the implementation will be as painless as possible.

### You and your team:

Many times, it isn't the FMIS that has failed the fleet, but the lack of training and commitment to ongoing learning that sabotages a fleet's success.

If you and your team aren't willing to take the time to properly learn the system, ask questions, participate in training, and so on, your FMIS is always going to be a struggle, regardless of the option you choose. If you can commit to learning the system and having your team trained on it, then any choice you make will be a success.

You'll want to determine just how committed your fleet is to learning the new system as well as the implementation process and support that the provider offers as part of your list.

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## ❯ User Experience

Last but not least is user experience. As not every fleet professional is a tech-whiz at heart, finding an intuitive and user-friendly system could be essential to the success of your fleet.

Make sure you get a thorough demo of the product before deciding. Can you easily find, access, update, customize, and change everything you need to without becoming frustrated? Can your team?

Building a business requirement matrix focused on these key areas will help you narrow down your search and find the right fleet management information system for your organization— hopefully with minimal headaches.

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