

Corporate Claims Management

Randy Shadley, CAFM

Fleet Safety Specialist

rshadley@ccmservices.com

(303) 472 - 2227

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com



How to Turn Fleet Safety Policy into a Strategic Document for Your Corporation

- What you will learn:
- What a Fleet Safety Policy is and is not
- What is a “Strategic Document”?
- Understand the differences between them
- How to turn a Fleet Safety Policy into a Strategic Document
- Value of having a Strategic Document

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com



How to Turn Fleet Safety Policy into a Strategic Document

- What is a Fleet Safety Policy (FSP)?
 - A written document, endorsed by Senior Management, stating the company's commitment to safe driving, and defining Standards, Responsibilities and Accountabilities for all affected groups.
- What it is NOT:
 - It is NOT the place for Procedures.

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com



How to Turn Fleet Safety Policy into a Strategic Document

- What is a “Strategic Document”?
- “An essential roadmap for business success.”
 - “Where are we now?”
 - “Where are we trying to go?”
 - “How do we get there?”
- In other words, It’s a Business Plan
- Includes:
 - Executive Summary
 - Goals
 - Objectives
 - Steps
 - Benchmarks
 - Timelines
 - Reporting

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com



How to Turn Fleet Safety Policy into a Strategic Document

- What does a Strategic Plan Document (SDP) Look Like?
- Written Narrative
- Graphic displays:
 - Flow Charts, Graphs, Charts
- Projections (Measurable Expectations)
- Benchmark Scorecard: Performance measured against Projections
- Most S/Ps are a “revolving 3 year plan”, with interim reporting/adjusting
- *“What gets measured gets done”* (attributable to Peter Drucker, Tom Peters, Edwards Deming, Lord Kelvin and others. Ben Franklin?).

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com



How to Turn Fleet Safety Policy into a Strategic Document

- How is it “Strategic”?
- Remember: unlike a FSP, a SPD has specific Goals, measurable Objectives, process Steps, Benchmarks scorecard, approved Timelines, Reporting of results.
- It is “*strategic*” when it sets goals (and all that follows), to improve SPECIFIC TARGETED aspects of your program that accomplish the stated goal(s).
- *"If you always do what you've always done, you'll always get what you've always got."* Henry Ford

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com



How to Turn Fleet Safety Policy into a Strategic Document

- Where do these “strategic, stated goals” come from?
- Identify “Needs” – Where do we want to be?
 - Management – yours; other stakeholders
 - Formal SWOT Analysis
- THIS is where you begin using your Fleet Safety Program to create a Strategic Document.

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com



How to Turn Fleet Safety Policy into a Strategic Document

Use the results of your current Fleet Safety Program to identify Needs, then set Goals, Objectives, Steps, Benchmarks, Timelines, and Reporting.

- So then you are done?
- No, remember the 1,2,and 3-year reporting periods. Adjust your Plan if needed, and make sure Fleet Safety Policy continues to be aligned.
- THAT's how you get a Strategic Document from your Fleet Safety Policy.

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com



How to Turn Fleet Safety Policy into a Strategic Document

- Why Should You Have a SPD?
- *"You've got to be very careful if you don't know where you're going, because you might not get there." Yogi Berra.*
- Having a SPD lets you decide where you should be going and how to get there.

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com



How to Turn Fleet Safety Policy into a Strategic Document

- Value of having a Strategic Plan Document:
- Having a Plan that requires regular review, analysis of metrics met, missed, or exceeded gives you either: validation that you're on the right course; Actions that need to be revised; or cause for celebration.
- "I'd say he's done more than that."
 - — Yogi Berra, *when asked if first baseman Don Mattingly had exceeded expectations for the season.*

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com



How to Turn Fleet Safety Policy into a Strategic Document

- But the #1 Reason You Should Have A Strategic Plan Document for your fleet program?
 - It Speaks to Your Executives in THEIR Language!

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com



How to Turn Fleet Safety Policy into a Strategic Document

- Checklist: What you will learn:
- What a Fleet Safety Policy is and is not
- Explain what a “Strategic Document” is
- Understand the differences between them
- How to turn a FSP into a SPD
- Value of having a Strategic Document

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com



How to Turn Fleet Safety Policy into a Strategic Document

QUESTIONS ???

Rshadley@ccmservices.com

(303) 472 - 2227

June 25-27, 2013

Renaissance Schaumburg Convention Center Hotel, Schaumburg, IL

www.FleetSafetyConference.com

