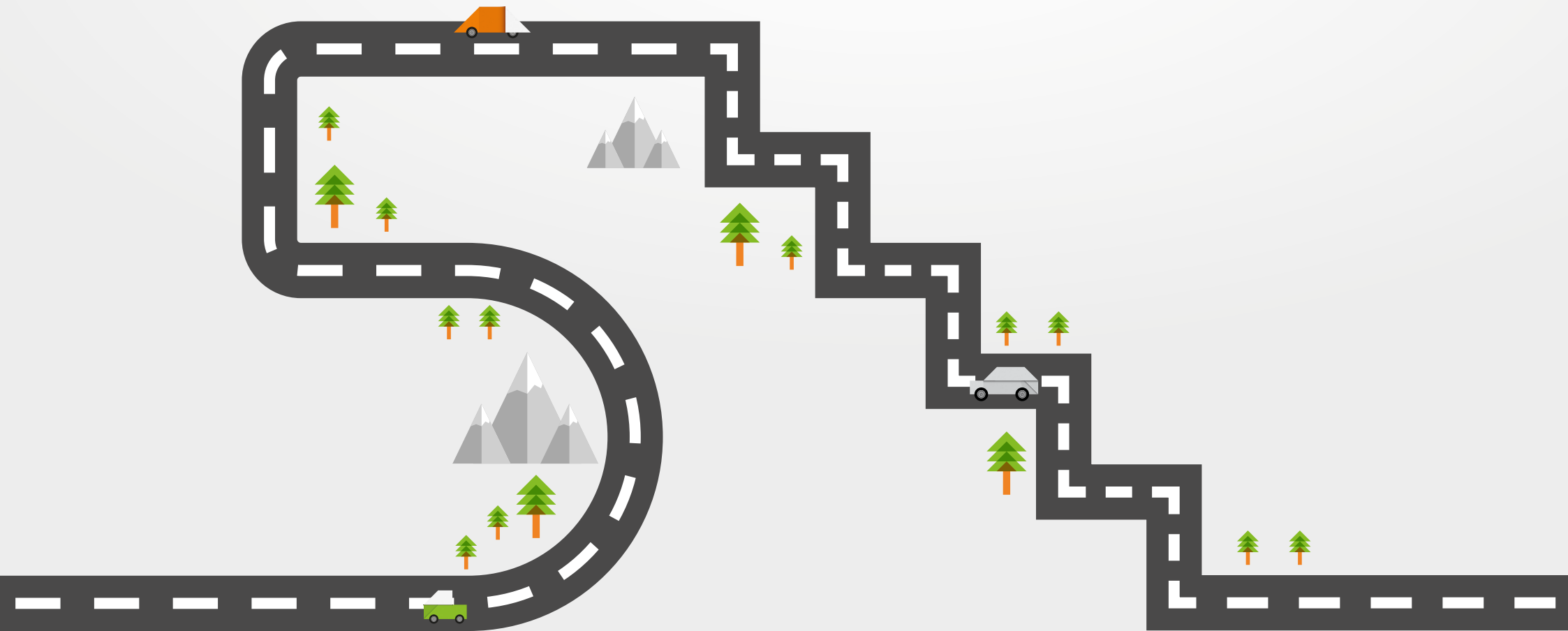


# The Five-Step Plan to Moving Fleet



# Introduction

---

Many public sector organisations renew their existing fleet contract even when they're convinced they can improve their deal, service plan and relationship elsewhere.

That might sound crazy, but many people believe the only thing more painful than an underperforming fleet is moving their fleet. They think it's more hassle than it's worth.

You won't be shocked to hear that we don't agree for two reasons:

1. There's nothing worse than poor fleet performance. If you're suffering from it then it's hitting you harder than you know.
2. There's loads you can do to make migration easier. And the smart move is to lean on your new (and your old) supplier to make it happen.

The barriers to migration are lower than they've ever been. It's no longer a free-for-all that leaves your contracts, data, paperwork, drivers and service agreements floating in no-mans land.

So when "enough's enough" you need to set out a considered tendering process with a defined migration methodology to get the fleet you deserve without the hassle you don't.

Here's how it's done.

## When Should I Move?

You should move your fleet contract as soon as possible after realising you're not getting the best deal. Don't blindly renew if your contract doesn't reflect your fleet requirement or standard of driver support, or if it doesn't deliver transparent value.

## How do you know?

[Download our Fleet Renewal Guide](#) to find out how to analyse whether your current deal is fit for purpose and what you should be doing about it.

# Step One: Prepare a structured tendering process

You'll know there are a multitude of fleet frameworks available to you – but if you are looking for something bespoke to your organisation. Here's how:

The tendering process is your chance to set the agenda. A great tender isn't a lengthy box ticking exercise. It's the time to define your goals and the issues that matter most to you.

## Setting Goals

Give everyone a clear understanding of what matters most to your organisation in terms of an ideal relationship.

### I want to outsource non-core activities to a partner

Give an indication of all the tasks you don't expect to do for yourself and how reporting needs to work

### I want expert support

Focus on the areas where you want specific help and advice to optimise your fleet performance.

### I want specialist vehicles for specialist tasks

Say what makes you different and why you need support that recognises that.

### I want the best possible deal

Ask for ideas on driving down costs at every point in the contract – including advice on the most appropriate procurement framework for your fleet requirements.

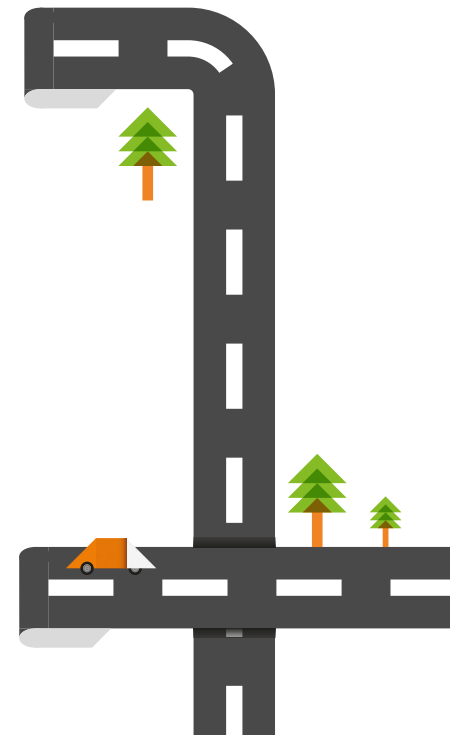
### I want to meet our environmental obligations

Specify your organisation's sustainability goals and commitments.

Supplementing your goals with some key information will ensure a clear response to your organisation's requirements. Start with these staples and expand to include everything that matters to your organisation's goals and commitments:

- Total number of vehicles
- Vehicle purpose – service delivery, employee transportation, executive cars
- Fleet profile breakdown – passenger cars and specialist vehicles
- Vehicle mileage for each vehicle
- Funding details – what types of funding you rely on, including any budget renewal dates
- Number of vehicle renewals per year
- Manufacturer support terms
- Ancillary or support services

Every ounce of detail you can deliver means a stronger, more customised response to your needs.



## Step Two: Write a great RFP

It's easy to confuse quantity with quality. Don't fall into the trap of trying to cover every fleet detail. Your goal is to layout your core information as clearly and concisely as possible in your request for proposal (RFP).

Following a few simple rules can transform your RFP into a document that brings out the best in your shortlist.

### Do

- ☑ Start with your defined goals and regularly reference them as you build your request around them
- ☑ State your performance priorities and how you'd like them measured
- ☑ Offer a follow up call or meeting. It might feel time-consuming. But it's quicker than clearing up all the inevitable misunderstandings.
- ☑ Consult a fleet specialist within your business (if that's not you)

### Don't

- ☑ Copy questions from a standard boilerplate procurement list unless they matter for your solution
- ☑ Ask the same question in ten different ways (unless you want the same answer ten times)
- ☑ Set unrealistic timescales. A truly customised response to your goals will need time for assessment, planning and proposal crafting.
- ☑ Be vague with afterthoughts. Stick to the core information.

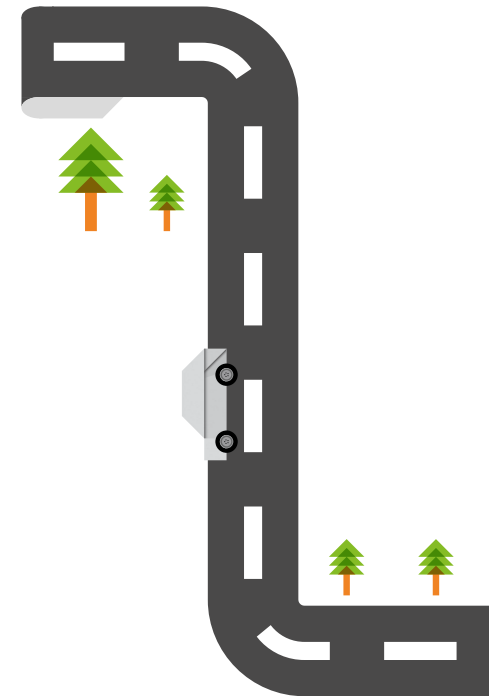
There are two alternatives to the RFP. We recommend you use them with caution or they can cause you more problems than they solve.

#### Request for Information (RFI)

– Works well if you're out of touch with the market and can be good to get a list of suppliers together who can support your requirements. Resist the temptation to grow too long a list.

#### Request for Quotation (RFQ)

– Works with high-level pricing benchmarking but if you don't provide an in-depth understanding of your fleet needs the numbers are unlikely to be reliable.



## Step Three: Evaluate against your goals

You've got some detailed RFP responses from a selection of qualified suppliers. You now need to make sure you evaluate them against your stated goals and detail you've provided.

### Here are the two areas that you really need to make sure are right on:

#### The Right Language

You'd be surprised how many teams get to the end of a tender process only to find out there's no real strategic fit. It's usually because there's a key bit of the puzzle missing and, when the realisation hits, it's a deal breaker.

If you've a fleet of specialist vehicles then an RFP should clearly outline credentials in the space. If they're not reading details on specific commercial responses on funding, vehicle types, regulations and business models then it's time to ring the alarm bell.

#### The Right Team

You might also be surprised by fleet management's complexity. There's more to it than meets the untrained eye.

That's why you should be on the look out for the external experts who make up a key part of a fleet's infrastructure. That means specialist suppliers, expert consultants, technology partners and networks that reach across the country or even the world. The universe counts.

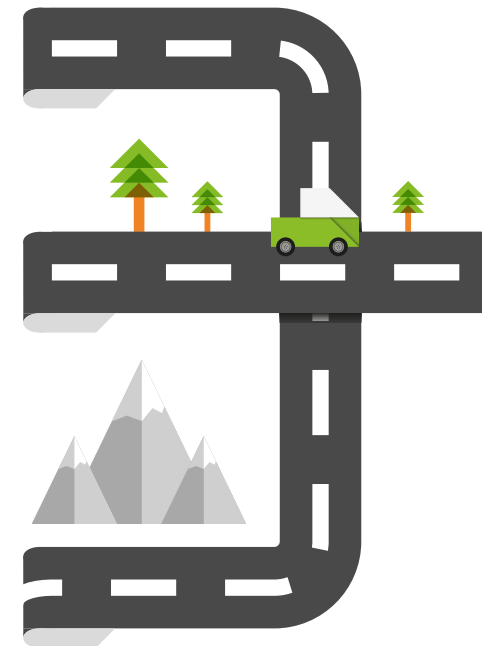
### Jump in the car...

We're not saying you need to give vehicles a test drive. But you should test drive the account team, experts and systems that will support your vehicles. Get out to meet your potential partner where they do their work and get right under their bonnet. Visit their offices and have a good look at how things really work.

And make sure you ask to meet the implementation team. They're a huge part of what's coming next...

### Specialist Vehicles eBook

Some tender processes fail to weed out special requirements. Our ebook explains how you can source and manage a cost-effective fleet of specialist public sector vehicles.



## Step Four: Get ready...

So you've made your evaluation, met the new team and decided to bite the bullet. You want to move.

Cue an attack of fear and buyer's regret. The gap between suppliers looks full of the holes where months of hard work can disappear without a trace. But in reality building a bridge has never been easier (particularly if you've managed an information-rich RFP process).

This is where your new implementation friends come in. They are here to help you get a managed migration process together and advise on what you (and everybody else for that matter) need to do.

Here's how you should structure the project to manage information, handle special requirements, set-up databases, build online systems, update policies and establish driver communication programme:

### 1. Define

You need to know what's happening and who's doing it:

- Agree the service offering
- Scope out product and service mix
- Articulate key tasks
- Gather and analyse all written documentation

### 2. Planning

You then move to a clear, signed off implementation plan:

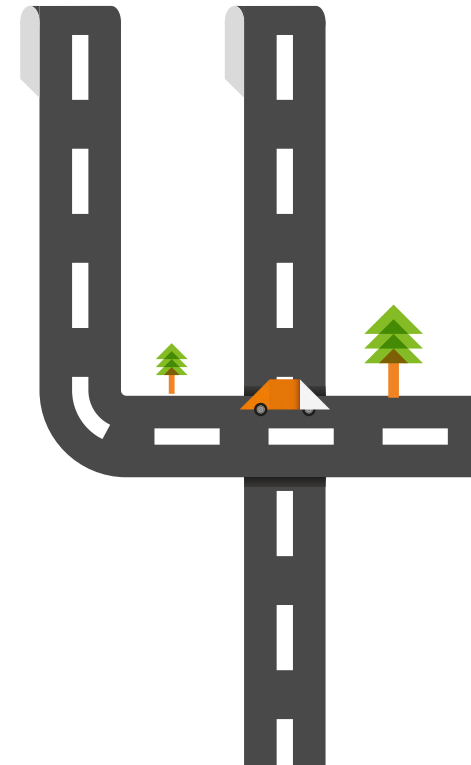
- Identify tasks, owners and timescales
- Highlight third party involvement and interactions
- Establish and align process differences
- Focus on process and admin improvements
- Launch workstreams with defined goals and objectives

### 3. Workstream

You then break the implementation into clear workstreams:

- Appoint leaders and stakeholders
- Agree the scope of each group
- Complete processes and procedures
- Test and implement process actions

A typical implementation lasts between two and three months. The structure ensures it's clear, transparent and easy.



# Step Five: Go

So what do these workstreams do? They make sure the key points of any migration are under total control. You won't be slipping on banana skins: you'll be systematically ticking off the right actions with speed, professionalism and efficiency.

## Engagement

Your suppliers need to talk. Your implementation team will hold regular calls and meetings to agreed SLAs for legacy obligations and responsibility as part of an exit plan.

## Data and Reporting

After a full data audit you will get clear template-based direction on how to exchange driver records and vehicles records that include codes, contract end dates, payroll and benefit information.

## Vehicle Lifecycle Events

You need to know drivers won't be disrupted. Clearly defined and integrated systems will handle:

- Vehicle Renewal Management – For simple driver continuity
- Legacy Vehicle Collection – Simple handover of vehicles
- Road Fund License Management – Keeping discs up to date.
- MOT Management – Channelling MOT requests at the right time
- Fines Administration – Allocated to where the law dictates
- Driver to Buy – Purchase option continuity kept intact
- Safety Recalls – Handled across all vehicles

## Driver Contact

Your drivers don't care until they face disruption. That's why you will run launch communications backed by tools like dedicated phone lines, online portals and mailboxes.

## Ancillary Services

A smooth running fleet is based on timely services that provide convenience and security. Your implementation team will handle the active transition of accident and risk management, rental and glass replacement to make sure there are no breaks in service.

### What Do I Do?

Your role in migration mainly focuses on managing your stakeholders, enforcing contractual commitments and providing information. Your three main actions in the migration (assisted by your implementation team) are likely to be:

- Managing data transfers
- Validating and paying invoices
- Arranging fleet insurance



# OUR MIGRATION PLEDGE

---

## So there you have it.

We can't promise you an immediate migration and we can't promise there won't be the odd bump along the way.

But we can make you three BIG migration promises, right here, right now:

1. It's way, way, way preferable to on-going bad service or paying over the odds
2. We'll orchestrate your move for the best fleet fit possible
3. Reading this guide has already started your journey

## Follow our simple rules and you'll be:

- Primed to run a fantastic tender
- Ready to write a first-class RFP
- Able to evaluate responses against key goals
- Structured to plan even the most complex migrations
- Empowered to handle every element of your move

Talk to us today about how we can help turn our promise into a new fleet experience for you and your organisation today.

**Tel:** 01753 802098

**Email:** [newbusiness@leaseplan.co.uk](mailto:newbusiness@leaseplan.co.uk)