

## **Fleet Management Training Syllabus of Courses**

**Designed to deliver  
Fleet Improvement  
&  
Cost Reductions**



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## Introduction

This brochure contains information about a range of training services in **vehicle fleet management**.

At Fleet Audits, we believe that fleet management is a vitally important corporate discipline, dealing as it does with expensive and potentially-dangerous asset types, and highly emotive areas of the business. To be effective, the individual running the fleet needs to command the correct levels of resource, authority, responsibility, and training.

In challenging economic times, it is vital that the fleet is operated to the highest possible levels of efficiency, on a consistent basis, and exactly in line with the requirements of the parent business. Our courses all focus on "**fleet cost reduction opportunities**" – seeking to identify any areas where better or different techniques can drive out unnecessary costs. Some of these are almost immediate (eg in the fuel budget) and applying to the current fleet; others relate to selecting more appropriate vehicles at replacement time.

Our range of training courses is designed to support "fleet managers" – irrespective of the actual job-title – at all levels, from the new junior in a small fleet, to the experienced senior manager responsible for all aspects of a very large fleet. External training provides a benchmark for existing knowledge and skills; a wider perspective on the fleet management arena; and access to a whole range of new skills and techniques to acquire.

Quality training in all aspects of fleet management is just one of the services provided by Fleet Audits - one of the leading specialist Consultancies for fleet operators.

We also provide:

- Operational audits
- Arm's length tendering facilities
- Cost-based allocation listings (FACTs)
- A wide range of other Consultancy services

A separate document about the full range of Consultancy services we offer is also available on request.



## The Need – and Value – of Training

The main objective of a fleet manager - irrespective of the actual title - must be to run the fleet of vehicles legally, safely, cost-effectively, and – above all else – in line with the real needs of the main business. At first glance, this does not seem to be a daunting list. On closer inspection, it is seen to be much more complex.

How safe is "safely"? Is "cost-effective" much more than simply achieving big front end discounts? What are the **real needs** of the business in terms of its transport - and how well do current arrangements really meet these needs?

More recently, the well-established pattern of "the company car" and the fleet management arrangements have been seriously challenged by a range of alternative models for delivering safe, cost-effective and tax-efficient systems using new funding principles and approaches to tax treatments. While this is a complex area, we consider it essential that fleet managers are at least aware of the issues involved.

There has also been a significant increase in attention to "grey fleet" operation: the business use of vehicles (mostly cars) owned by individual employees for travel on employer's business. On the one hand these have a separate cost profile (purely revenue expenses) and offer high levels of flexibility: on the other, bound by the same Health & Safety/ Duty of Care considerations as apply to business-controlled vehicles.

Keeping employees mobile, promoting good recruit/ retain profiles and delivering "business travel by motor vehicle" are now essential skills required within most organisations. Similarly, an awareness of the key features of the many different "schemes" is vital to ensure that on review, all the options for change can be considered fairly.

On-the-job experience is all very well, but it can be self-limiting to relatively simple reaction to events, and slow development *along existing lines*. Without an external point of reference, fleet policy can lag behind changes in legal, technology, personnel issues, wide-scale economic pressures, and environmental factors.

Our courses address these needs to the relevant level without getting into the fine detail of specific scheme design.

Quality fleet training for the fleet manager provides a range of benefits. These include:

- Improved techniques in the major fleet cost areas:  
*acquisition, disposal, maintenance control*
- Wider understanding of all the operational methods
- New techniques in cost control
- Green issues – with direct links to tax impacts on drivers and employers
- Enhanced administration techniques
- Improved managerial skills
- Increased job satisfaction

It is in fact, relatively difficult to introduce new experimental ideas into a fleet situation. The costs of getting it wrong, and the potential disruption to staff morale and motivation, tend to inhibit the introduction of new and untried tactics and policies. External training provides opportunities to evaluate some of these options through the experience of other fleets. Training courses also provide the opportunity for theoretical experimentation, to explore the advantages and disadvantages of change **entirely without risk**.

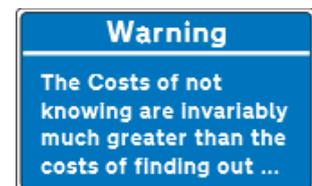
Despite the costs and personal interest involved in fleet operation, there is remarkably little in the way of training courses to teach fleet managers the range of disciplines which are required for cost-effective fleet operation.

At Fleet Audits, the leading Vehicle Fleet Consultancy, we have developed a number of training courses to address the real needs of fleet operators throughout the UK. Each course has been carefully designed to include high quality, expert tuition based on current best practice in fleet management. Although each course has its own format, the common link is to concentrate on relevant fleet management issues, for relatively small numbers of delegates. This ensures that all delegates can benefit from each other's experience, as well as from the more formal tuition.

The courses are essentially structured to follow the life-cycle of individual vehicles and the whole fleet over at least one full cycle (typically 3 – 5 years). We include reference to the cost drivers which are always present (*someone, somewhere **always** has to buy, fund, maintain, insure, fuel & tax etc every vehicle – irrespective of how these costs are packaged into different schemes across different accounting centres*). We cover cars and vans (up to 3,500 Kg) for all these aspects.

Importantly, we set these “mechanical” aspects of fleet operation within the general business context: fleets must **always** serve the needs of the main business – in all their diverse forms. This includes reference to costs, HR considerations, driver aspirations and expectations, the legal aspects of Duty of Care, private use and taxation factors. All of these issues should be considered as part of the overall fleet policy design – but in ways that meet the overall style and philosophy of the main business.

So we cover the full range of fleet styles, from the low-cost/tight control to the full user-chooser options. This reflects the overall market – and provides plenty of ideas to spark off the delegates’ imagination!



The individual courses and workshops on offer are set out in the following sections. For each course there is a full description and detailed syllabus, and an indication of the typical group size and delegate profile. The separate enclosure lists the current availability of courses, together with price details and booking forms.

We are confident that every one of our courses brings significant benefits to the delegates - and to their employers. Our courses have won wide recognition from independent bodies, as well as from previous delegates. Above all, we believe that they represent a well proven and highly cost-effective way to cut fleet costs, and to improve efficiency.

## The “**Basic Fleet Management**” Course

### **Objectives**

The BFM course is an introduction to good fleet management practices. It aims to impart - in simple, non-technical language - the key skills needed for modern fleet management. It is essentially a course on **efficient fleet operations**, rather than on policy and strategy.

It is particularly designed for a wide range of administrators and managers, with a little previous experience and knowledge of fleet management issues, who undertake their role in fleet on a part- or full-time basis.

### **Rationale**

Running a fleet of cars or vans calls for a wide range of skills. Vehicle acquisition and disposal; negotiating contract agreements; maintenance and warranty control, dealing with drivers and a host of others, are all involved on a day-to-day basis.

Many of these skills are transferable, and in themselves, need relatively little specialisation. Others are very specific to the business of fleet management. But fleet management is not an exact science – it must **always** be organised to serve the business which is actually using the fleet.

Because the fleet market in the UK is mature and well developed, there is a very wide range of methods available to run a fleet. But cost and functional aspects must be considered, to ensure that the fleet is run both properly and safely. Our **Basic Fleet Management Course** is designed as a comprehensive overview of fleet operations and includes a study of the main options, the cost-reduction techniques and the administration needed to keep the fleet under *effective* control.

### **Outline of Syllabus**

The main topics included in the 2 day residential course are:

- Brief history and background to the car and van fleet markets
- Explanation of major cost types, causes, magnitude and variabilities
- Operational options:
  - purchase/ leasing/ fleet management/ contract hire for vehicles
- Vehicle selection and impact on whole life cost profiles
- Fuel – choice, cost, control
- The Environment/ Green-fleet issues and links to taxation
- Insurance and accident/ risk management
- Replacement cycle optimisation
- Fleet administration, monitoring and reports
- Current issues and sources of information
- “Grey Fleet” operation and management

#### **COST REDUCTION OPPORTUNITIES**

- Quick wins
- Strategic benefits

We cover the management of “grey fleets” – employees using their own cars for business journeys. This market has always been present but has expanded recently and must be seen as an important part of the continuum of options open to organisations to deliver business travel and mobility. There are many operational, risk, cost and administration factors to consider.

These topics are of course all highly topical and relevant to efficient fleet management. They are covered in some detail, with particular emphasis on “best practice” in all areas. This provides a thorough grounding in the options available in fleet management, and their strengths and weaknesses for given fleet situations. Simple syndicate exercises are included to reinforce these themes with real life practicalities.

### **Format & Logistics**

BFM courses are run with small numbers, typically 5 to 8. Delegates have plenty of opportunity to relate course content and courseware to their own fleet circumstances.

The whole course lasts for 48 hours. Delegates assemble for an informal dinner on the evening before the first full day. This breaks the ice, and gets the tuition period off to a flying start on the first full morning. The course content is summarised on the afternoon of the second day, just before delegates depart.

The course is designed to benefit employee and employer. While employers normally pay the course fees, we can of course accept individuals at their own expense.

The course fee is **fully inclusive of tuition, comprehensive courseware and 48 hours’ delegate accommodation** including dinner/ bed/ breakfast/ lunch and refreshments. Wherever possible, we use groups like Holiday Inn/ Hilton Hotels to provide known standards of service at reasonable cost.

The current costs, together with dates and venues of the next courses are set out on the enclosed booking form.

### **Who Should Attend**

The BFM course has been carefully designed to meet the needs of:

- Fleet Managers/ Administrators with some previous fleet experience
- Employees with split responsibilities which include fleet control
- Those involved in fleets undergoing merger/ change - possibly quite rapid change
- Employees in one part of fleet management, now assuming wider responsibilities.

We have found that the mixed nature of a typical course group is of great benefit, since delegates can share their experience and expertise. In addition to the formal tuition, many delegates keep in touch with us *and* with their course-mates over the long-term.

### **Signs Of Success**

All delegates receive an attractive Certificate of Attainment, on completion of the course.

## The “Intermediate Fleet Management” Course

### **Objectives**

The IFM course is intended to strengthen the acquired skills and knowledge of fleet managers and administrators who have been ‘*in situ*’ for some time. The training is wide-ranging and covers the most important areas of modern operational fleet management in some detail. In doing so it provides the manager with a broader perspective of his or her rôle in the business and of the UK fleet market.

### **Rationale**

Running a fleet of cars or vans in today’s environment is a complex activity which impacts on many areas of the business. It requires the fleet manager or administrator to exercise a wide range of skills over a number of different disciplines. The cost of running even a relatively small fleet is substantial, and considerable savings and benefits will be obtained from a fleet that is operating at maximum efficiency. To achieve this it is essential that today’s fleet manager is fully equipped, trained and supported in this vital business activity. Too often in the past the job of fleet manager or administrator has landed on the shoulders of “the most convenient person”, with little thought given to the scale of the job, previous experience, or any training requirements.

Our IFM course is designed to fill this gap in a pragmatic and relevant way. To do so it recognises the differing needs of the fleet in each business. The course is designed to be highly interactive with delegate numbers kept low. Above all, we are aware of the fact that fleet management is not an exact science and there is little place for prescriptive solutions. It is vital that the fleet activity is organised to serve the business that is running the fleet.

### **Outline of Syllabus**

The main topics included in the 4 day course and which take the form of individual modules are:

**UK Fleets** - the size, shape and background to the UK fleet market. Outline comparison with Europe and elsewhere. The rôle of the fleet car in the business.

**Cost Types** - main cost factors in fleets, how they arise. Whole Life Cost analysis and key cost variables.

**Acquisitions** - vehicle selection and acquisition. The various methods of supply - their strengths and weaknesses.

**Maintenance** - relationships to time and mileage. The impact of technology. Controlling maintenance expenditure. Information sources. Warranty optimisation.

**Insurance and Risk Management** - premium minimisation without compromise to cover. Types of cover. Driver training. Risk management.

**Fuel** – choice (including the many “alternative” fuel types), costs, and controls. Fuel cards.

**The Environment** – minimising the effect of the fleet on the Environment. Fuel types and technology, travel plans and alternative working methods.

**Fleet Administration** - monitoring and reporting. Measure in order to manage. The rôle of the computer in fleet management. Sources of valuable data - paper & electronic resources. The increasing rôle of telematics/ tracking systems/ on-board performance monitoring

**Funding and Taxation** - methods available and their relevance to the requirements of the business. Use vs ownership. Summary of the major tax areas impacting on fleet cars. Implications for administration.

**Driver Taxation** – the effects on the driver – and the company – from vehicle choice. Minimising the tax bill. Buy-up/ buy-down/ buy-out arrangements.

**Disposals** - the used car market and its relevance to the fleet operator. The range of disposal methods available - their strengths and weaknesses. Optimising depreciation costs. Predicting residual values. Replacement cycles.

**Bringing it all together** - identifying the needs of the business and ensuring the fleet matches those needs. Ensuring the fleet function is recognised and optimised.

Each module is covered in some detail, and provides a valuable means of understanding the options available in fleet management. At the end of the first 2 day session, delegates are allocated a short project on a relevant topic (which may be different for each delegate) is set for presentation and review at the second session. These projects generally relate to a clearly-identified issue within each delegate's own fleet, so providing an educational focus and requirement on a relevant business task – so everyone benefits.

### **Format & Logistics**

The IFM course is run with a small number of delegates, typically 6 to 8. This allows each delegate plenty of opportunity to relate the course content and the courseware to his or her own fleet arrangements.

The course consists of two, 2-day sessions. Each session is separated by a number of weeks to enable the delegates to continue their duties with minimum disruption, to reflect on the first session, and to prepare for the second session.

The course is designed to benefit both employees and employer. Although it is normal for employers to pay the course fees, we can of course accept individuals at their own expense.

The course fee per delegate is set out in the accompanying leaflet. The fee is payable in full, in advance. The fee covers the tuition, full courseware and the necessary conference facilities.

The fee specifically **excludes** overnight accommodation, main meals at the hotel, and travel to/ from the venues. Fleet Audits will pay these costs (with the exception of travel costs) in the first instance, and recharge the delegates company immediately following the course. Delegates may pay for their overnight accommodation costs directly, subject to advanced arrangement with Fleet Audits Ltd.

Courses are usually based at a location which is convenient for the majority of delegates. Wherever possible, we use groups like Holiday Inn/ Hilton Hotels to provide known standards of service at reasonable cost.

### **Who Should Attend**

The IFM course has been carefully designed to meet the needs of :

- Employees who have previously attended our BFM Course
- Employees who have some experience of fleet operations in a full time capacity of more than 2 years\*
- Those involved in fleets undergoing merger/ change - possibly quite rapid change
- Employees who have only been employed in one part of fleet management, and are now assuming wider responsibilities.

We have found that the mixed nature of a typical course group is of great benefit, since delegates can share their experience and expertise. In addition to the formal tuition, many delegates keep in touch both with us and with their fellow delegates over the long term.

### **Signs Of Success**

All delegates receive an attractive Certificate of Attainment, on completion of the course.

- \* *The length of experience suggested to undertake each course is a guide only. If you feel you would benefit from a more advanced course, please feel free to discuss this with us*

## Other courses

The modular approach we use to the courses, coupled with our experiences from our Consultancy client base, provides the flexibility to offer a range of other courses on a more-or-less bespoke basis.

We are open to discussion about how we could work together to build a course structure right for your purposes and needs: from an in-house version of one of our courses for a whole fleet team, to specialist sessions dealing with very specific requirements, such as:

- Greening the fleet and mobility functions
- Optimising use of telemetry and various data-collection devices
- Deploying electric vehicles in suitable niche areas
- -- and many more

Our primary objective is to help the development and professionalism of “fleet managers” but we can of course also provide training for businesses in the fleet supply chain – manufacturers, dealerships, leasing and rental providers etc. This may be more effective where a number of employees in a team are to be trained within a short space of time, and may be much more effective than participation in one of our open courses.

We are always open to discussions about ways we can help clients and their employees to improve fleet performance and enhance career development.

## Development – For Customer Satisfaction

The content of our courses has changed continually since we launched them – back in 1988. We ensure that we modify each module of each course on a regular basis, to keep it up-to-date, relevant, and accurate. Thus, we have already incorporated sections on alternative fuels, electric vehicles, telematics, and changes in both benefit in kind and corporate taxations.

These changes are introduced as our practical experience in the fleet market place indicates the need. We are, after all, continually dealing in the front line with fleet operators of all kinds through our Consultancy work.

Another source of change and modification to the course content is from the delegates themselves. We monitor their reactions throughout each course, and we follow up with a post-course questionnaire. This information is studied carefully, to ensure that the course material is not only accurate and up-to-date - but also maintains its relevance to the typical delegates who attend.

We have already provided training to a very wide range of fleet operators. These come from public, charity and private sectors. The list of organisations who have sent delegates is impressive. Below we list just some of the bigger/ better-known names – although it's the smaller companies who have provided the majority of the candidates – and who probably get the most benefit from the course materials.

St Regis Paper	ITN
Forest Laboratories	Pharmax Ltd
Allianz/ Cornhill Insurance	Royal Mail Car Fleet
Telewest/ NTL	Barnardo's
H.M Customs & Excise	Sequent Computer Systems
Arlington Securities plc	RSPCA
Freight Transport Association	DWP/ <DSS previously>
Audi Corporate Sales Team	Gratte Bros
Kwik-Save Group plc	Reebok International
Centrica	Serco
Siemens Group Services Ltd	Granada UK Rental & Retail plc
Thorn EMI	3M UK
Daihatsu Fleet	BMW Corporate Sales
Pitney Bowes plc	Vauxhall Motors Fleet
The Employment Service	Imperial Cancer Research Fund
Stannah Group	Sovereign Finance
<i>And many, many more!</i>	

We know, from the regular contact we maintain, that many of the delegates keep in touch on a networking basis, with other members of their course. In our view, this demonstrates the advantage of bringing people together, to learn common solutions to common problems.

From our follow-up questionnaires, we also know that most delegates genuinely derive benefits. We list some of their comments overleaf. In fairness, we do get complaints - mostly, that we work the course too hard!

### **Some interesting comments -- -- --**

The following comments are extracted from the questionnaires that are sent out after each course. They represent the overall views on our courses by the most important people of all - the delegates!

**"Absolutely fascinating. I never realised that there was a logic to the fleet industry!"**

*Purchasing Controller, office equipment company, 320 cars plus 55 vans*

**"It was very hard work, but well worth it. I now feel that I have more control. I think we have already saved the course fee."**

*Assistant Fleet Controller, security company, 80 cars plus 240 vans*

**"At last I understand what I'm supposed to be doing! I have been able to advise our Directors on cutting fleet expenditure."**

*Personnel Assistant, environmental services company, 45 cars*

**"This course has really helped us understand how to improve our overall performance to benefit our departmental clients and of course the taxpayer. The different types of 'fleet supply' was a revelation! We will be reviewing our use of rental cars and vans as a matter of urgency."**

*Head of Transport, Government department, 4,300 cars and 250 vans*

**"Excellent overview on the Duty of Care and environmental stuff – we can see why we need to re-visit our allocation policy!"**

*Facilities Manager, office supplies business, 70 cars plus 22 vans*

**"The course has put a great deal of our day-to-day work into better context. We can now make proper comparisons with private sector businesses. We also identified a major loophole in our controls procedure. Very many thanks for an excellent course."**

*Fleet Supervisor, local government department, 480 cars plus 32 vans, over 2,000 grey-fleet (own car) employees with business mileage*

**"Fabulous! I will send the rest of my department!"**

*Fleet Support Administrator, construction/ plant hire company, 385 vehicles  
(She did!)*

**"A great deal of food for thought. We'll now have to re-think our policies on driver training and fuel control."**

*Group Accountant, packaging business, 580 cars*

**"--- I can now really help drivers with their car problems."**

*Secretary to FD, specialist chemicals, 80 cars*

**"Hard work but rewarding. Savings already made; directors better informed; better rates from leasing company."**

*HR Executive, regional newspaper group; 215 cars plus 50 vans*

## **SUMMARY - FLEET TRAINING OPPORTUNITIES**

Running company cars and vans is an expensive business. Even without unnecessary expenditure, it is a major overhead cost. This document has set out our Training solutions to the very real problems facing fleet operators. We have described the various courses and workshops which we offer to train fleet managers, fleet administrators, and others who have an involvement in day-to-day fleet management, or more strategic issues.

Our experience - and that of our course delegates - shows that most fleets can attain very real cost reductions when new techniques are explained and made available to the individual employees who are responsible for the fleet activity. There are also benefits in efficiency, productivity, on-road safety and green credentials at corporate levels.

Without up-to-date knowledge of fleet management techniques, or any basis of comparison with similar fleet circumstances, inefficiencies and unnecessary costs are almost inevitable. For "quality" in the fleet operation, expert training to provide relevant discipline and technical support, is absolutely essential.

Formal training under a recognised course will enhance existing expertise, and will very rapidly pay for itself through reduced fleet costs, and improved administration.

The individual employee benefits too. Our courses provide clear stepping stones to formal qualifications, in addition to job enrichment and improved confidence. Extended contact with other delegates provides invaluable networking opportunities for longer-term problem solving.

Full details of course availability and costs is set out on the booking form, which is enclosed.

***"You don't know what you don't know"***

***"If you always do what you've always done,  
you'll always get what you always got"***

***Act now, to train for a leaner, fitter fleet in the future!***