

# How to Implement a Fleet Preventative Maintenance Plan: An Interactive Checklist

Implementing an effective fleet preventive maintenance plan is a process consisting of several stages, each with important action steps you need to take. To help you make sure you're covering all the bases, we've put together this easy-to-use, interactive checklist for implementing a fleet preventive maintenance plan step-by-step.

## What You Need to Implement a Preventive Fleet Maintenance Plan

In the first stage of implementing a preventive fleet maintenance plan, you'll need to gather some information and take care of some basic planning steps including:

**Develop Checklists:** Develop checklists of all preventive maintenance activities to be performed during scheduled maintenance. Maintenance activities will differ for each class or type of vehicle, so you'll need to develop a checklist for each vehicle type.

**Determine Service Intervals:** Establish service intervals, or the frequency at which preventive maintenance will be performed on vehicles.

**Develop Processes for Driver Inspection Reports:** Drivers should submit written (or electronic) vehicle inspection reports after operating a vehicle in the fleet. Establish clear policies and procedures on driver requirements and report submissions.

**Develop Driver/Operator Complaint Procedures:** You should also have a process for drivers to submit written complaints, such as when a vehicle breaks down or is exhibiting symptoms that could indicate a problem.

**Secure an Automotive Facility:** You need an automotive facility where inspections, maintenance, and repairs will take place. Some fleets have an on-site automotive facility, while others outsource to a third-party automotive facility.

**Address Staffing Requirements:** A staff of automotive technicians qualified to perform inspections, maintenance activities, and repairs is essential for successful fleet preventive maintenance. If your facility is on-site, it's likely that you'll need to hire dedicated automotive technicians. If you're outsourcing, however, the vendor will have its own technicians.

**Establish Record-Keeping Methods:** To track maintenance activities, you'll need a consistent record-keeping method. Manual record-keeping is an option, but software can automate many manual tasks, boosting efficiency and accuracy while also saving your staff hours of time.

**Establish a Parts Ordering and Inventory Process:** Preventive maintenance activities rely on the availability of necessary parts and materials, so establish a process for ordering parts and maintaining spare parts inventory.

## Establish a Baseline for Every Fleet Vehicle: Action Steps

**Conduct Inspections:** Every vehicle should have a recent inspection report.

**Gather and Document Available Data:** Gather all available information on every vehicle, including parts replaced, vendor information, maintenance history, and any other information available.

**Document Baseline Metrics:** Document baseline data such as current mileage, fluid levels, and other vehicle-specific data.

## Determine Maintenance Intervals: Action Steps

**Maintenance Frequency:** How often should preventive maintenance be performed for each vehicle class or type?

**Establish Triggers:** What triggers will be used to prompt preventive maintenance for each vehicle class or type? Triggers may include mileage intervals (e.g., every 3,000 miles), hours of operation (e.g., every 1,000 operating hours), etc.

**Consider Operating Conditions:** In some cases, vehicles operated in severe conditions may require more frequent maintenance. If this applies to some or all vehicles in your fleet, determine how to distinguish normal from severe operating conditions and its impact on maintenance intervals.

**Establish Metrics:** Certain metrics should be monitored for all vehicles, including mileage, fuel usage, operating hours, etc. These data points should be documented consistently, and they should be measurable.

## Choose Fleet Maintenance Software

**Make a List of Key Requirements:** Do you need to generate reports? Facilitate driver or operator inspection reports? Keep track of assets and inventory?

**Evaluate Fleet Size Capabilities:** What is the average fleet size managed with the software? Do you need a more robust solution, or a more affordable solution for managing a smaller fleet?

**Consider Mobile Capabilities:** Fleet maintenance software with mobile capabilities allows operators and automotive technicians to easily enter data, generate reports, and perform other documentation tasks.

**Evaluate Triggers and Alerting Capabilities:** Fleet maintenance software should allow you to define triggers and issue alerts to fleet managers or maintenance managers when a vehicle is due for preventive maintenance.

**Scalability:** Growing fleets often find cloud-based software an affordable option that can scale seamlessly with the growth of the fleet.

## Develop Checklists and Reporting Policies and Procedures

**Develop a Preventive Maintenance Service Checklist:** Your preventive maintenance service checklist should include all inspection and maintenance tasks that must be performed for each vehicle type, as well as the frequency with which they should be performed.

**Develop Driver Inspection and Reporting Systems:** Operators are your first line of defense in running an effective fleet preventive maintenance program. Establish policies and procedures, as well as checklists for drivers and operators outlining requirements for reporting after operating a vehicle.

**Establish Procedures for Complaints:** In addition to regular post-operation inspection, operators often notice signs of problems that may not be obvious even to experienced automotive technicians during routine inspections. Establish simple processes for drivers and operators to submit complaints and problem reports. These reports should be flagged as urgent so that they can be immediately addressed by fleet managers or maintenance managers to ensure operator safety.

## Track Metrics and Monitor for Success

**Establish Key Performance Indicators:** Define measurable goals and performance indicators that provide a clear measure of the success of your PM program over time.

**Monitor Preventive Maintenance vs. Unscheduled Maintenance:** Keep track of the number of times a vehicle goes through preventive maintenance activities compared to the number of times a vehicle suffers an expected breakdown or required unscheduled maintenance.

**Track Vehicles Throughout Their Lifespan:** Track vehicle metrics throughout the entire life of the vehicle while in service, such as the total service years, number of parts replaced, fuel efficiency, mileage or operating hours between breakdowns, etc. This data can aid in informing decision-making when it's time to invest in new fleet vehicles.

**Cost Savings:** The metrics described above, coupled with cost information, can provide insight into the value gained from your PM program. If you're getting additional service time out of vehicles, are replacing parts less frequently, and experiencing fewer out-of-service delays, your preventive maintenance program is boosting your company's bottom line.