



Application Notes

Best Practices for Implementing @Road GeoManager_{SM} iLM[®]

10 Steps to a Successful Deployment

October 2006



Best Practices Application Notes



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AN-10Step-1006US

October 2006

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Introduction

This document describes best practices for implementation of the @Road GeoManager_{SM} iLM[®] Field Force Management (FFM) solution. These best practices were drawn from various customers across the United States and incorporated into 10 steps new customers can take to help ensure a successful GeoManager deployment.

@Road GeoManager Service Description

@Road GeoManager integrates GPS, wireless and Internet technologies into mobile software applications that strengthen your ability to manage your mobile workforce. GeoManager is a robust Field Force Management solution that offers fleet tracking, fleet management and other Mobile Resource Management (MRM) tools with an array of features and options.

Whether you want to instantly map the location of your fleet, find the nearest vehicle to a job, dispatch text messages to workers, log work hours or view and print detailed reports, GeoManager helps you manage overall mobile workforce performance, reduce costs and maximize customers' satisfaction with your field services. And because it is an online solution, you can use it to better manage your mobile workforce from any location where you have Internet access.

With @Road deployment, each vehicle in your fleet will contain a GPS receiver—called an iLM (Internet Location Manager™) and an antenna. The iLM provides GPS location information, while an optional iDT (Internet Data Terminal™) with keypad allows messages to be sent to and from the vehicle.

Implementation

Step 1 – Develop an Implementation Plan

Just as every successful business has a plan, every successful new service implementation needs a plan. The best practice steps offered here may serve as an outline of your @Road GeoManager implementation plan. Depending on the size of your organization and your service area, we suggest a 2- to 4-month timeframe for phasing in these changes.

Step 2 – Designate an @Road System Administrator

To maximize the speed and efficiency of your implementation, designate one of your employees as an @Road System Administrator. This person will be trained to use the @Road system and will manage it as you deploy business improvement applications throughout your service area. Your @Road Implementation Manager will guide your chosen System Administrator through the implementation process to help you attain the maximum benefit from @Road services. If you do not know the name of your @Road Implementation Manager, refer to the [Support](#) section of the GeoManager home page or call 1-877-4AtRoad.

Step 3 – Get Trained by @Road

Training is a key element of a successful @Road implementation. Learning how to use @Road solutions requires a small initial time investment to result in a substantial long-term business gain. @Road training courses are conveniently offered online. Approximately eight hours of training is required for a person to proficiently operate and administer the GeoManager system. Your @Road System Administrator should enroll in the standard GeoManager course. If this person will also be the person who defines reports, delivery options and system criteria for your @Road system, then he or she should enroll in the Administrator course as well. To register, simply click the [Training](#) link on your GeoManager home page or email training@road-inc.com.

Step 4 – Master the @Road System

After your @Road System Administrator attends training, he or she must continue to work with GeoManager to master the program. During this learning stage, the @Road Implementation Manager and/or Customer Relationship Manager will work closely with your @Road System Administrator to resolve any questions and help refine your @Road implementation plan.

Step 5 – Test Your @Road System

Select between two and ten vehicles to test the @Road solution. Try out features like Speed Exceptions and Landmarks. During testing, your @Road System Administrator learns about the unique characteristics of your service area and how best to use @Road to achieve cost savings and improvements in how you manage your mobile workforce. During this stage, the System Administrator should determine a driver-performance baseline for jobs or customers per hour or day, along with speed parameters and Landmark configurations for all your trucks.

Once testing is completed and it is confirmed that the @Road system is working properly, you are ready to start using the various features of GeoManager to help manage your mobile workers, their work and your assets. The next five steps suggest the features that may help you realize the most rapid return on your investment (note: some of these features are standard, while others are options your account may or may not have selected). Your @Road System Administrator has learned how to implement these features through GeoManager training.

Step 6 – Implement Landmarks

Once trained, your @Road System Administrator will know how to set up Landmarks for customer sites, branch offices or other locations you want to track for measuring driver and fleet performance. Using the GeoManager Landmarks feature, you can verify that your drivers are following their assigned routes and servicing your customers on time. Landmarks also help identify drivers who are using company vehicles for unauthorized after-hours jobs, taking excessive breaks or making unnecessary detours.

Step 7 – Implement Standard Reports

@Road Reports keep you informed of the activity of your @Road-installed vehicles on a regular basis and provide you with valuable information to help you maximize the productivity of your fleet. You can generate a variety of Standard Reports to show both current and historical data on vehicle movement, stop times, distances traveled, proximity to Landmarks, maximum speed traveled and more. Your @Road System Administrator can define parameters for which vehicles are included in the Reports, as well as how, when and to whom they are delivered. For additional detail, please refer to the @Road Reports Overview (PDF), available through the [Support](#) link at the upper-right corner of the GeoManager home page.

Step 8 – Implement Exception Reports

In addition to the Standard Reports mentioned in Step 7, @Road offers Exception Reports to help managers monitor activities and events that are unexpected or out of company-set bounds. There are 17 types of Exception Reports available with GeoManager iLM; two that generally bring about a rapid ROI are Speed and Off Hours Use Exceptions.

According to the U.S. Environmental Protection Agency (EPA), truck fuel economy drops significantly as speeds rise above 55 mph. Using @Road Speed Exception Reports to limit top highway speeds, trucks can save fuel, reduce emissions and prolong engine life—leading to a reduction in your overall costs. Enforcing a maximum speed of 55 mph can save up to \$1,000 per year per vehicle, depending on your service area.

Off Hours Use Exception Reports help you discover whether company vehicles are being used on an unauthorized basis after hours or for other personal use. When an @Road-installed vehicle is in use outside of defined work shifts, an Exception can be triggered and reported to managers. By

monitoring such unauthorized use of company vehicles, one @Road customer reduced its overtime costs by 75 percent in just one week.

Step 9 – Implement Messaging (Optional Feature)

Using the @Road Messaging feature along with the @Road iDT, dispatchers and drivers can easily exchange messages between vehicles and the office. Messaging is a more cost-effective way to communicate with drivers than mobile phones. The @Road messaging service costs a flat \$14.95 per month, compared to a monthly cellular service of \$60 or more. It also provides a written record, with a time and date stamp, of what was communicated to a driver.

To test Messaging, select between two and ten vehicles. Then define the most common messages you will use with your drivers on a daily basis (GeoManager allows you to create predefined messages or forms that you can quickly send to one or all of your drivers). You can create forms for identifying customer addresses, driving directions or special delivery instructions—or send and receive plain text messages just as you would with a mobile phone or an e-mail program.

Step 10 – Deploy Proof of Service Messaging (Optional Feature)

A further component of the GeoManager Messaging feature is the ability to create instant proof-of-service records. Drivers can respond to dispatcher messages with a single button push, or send a message each time they complete a job. These actions instantly create electronic records of job status—complete with date, location and time stamp—which eliminates paper record-keeping and simplifies the billing process.

The elimination of paper record keeping typically saves drivers 10 to 15 minutes a day. At a cost of \$120 per hour, messaging can save you up to \$30 per day, per driver—easily cost-justifying your @Road investment. Additionally, disputes with customers over missed appointments, pick-ups or deliveries are easily resolved because the record provides proof of time and location.

Start Improving Your Business Today

By implementing this 10-step plan, you can quickly realize a positive return on your @Road investment. Through improved management of your mobile workers, their work and your assets, you will achieve the benefits of reduced operational costs, savings on fuel and vehicle maintenance, improved employee efficiency and greater customer satisfaction.

@Road is committed to helping you through each stage of your implementation and providing excellent ongoing support. Any problems with your account can be addressed 24x7 through our online [Service Request](#) process, while additional support is provided through your @Road Customer Relationship Manager. Please contact us at 1-877-4AtRoad or support@road-inc.com.