

CHECKLIST | FUEL MANAGEMENT

Presented by The Reschini Group

Date:

Review conducted by:

An effective fuel management program allows you to control expenses, address problematic concerns and streamline your operations. By working with a reliable vendor, you can easily meet the needs of your fleet while also reaping these benefits:

- Reduce or eliminate expenses associated with fueling your vehicles
- Accessibility to lower fuel prices through member networks of dual-card accepting stations
- Convenience to your drivers
- Financial security through PIN number usage
- Electronic transaction capabilities
- Custom billing
- Exception reports outlining your vehicles' performance, maintenance needs and problems

| BEST PRACTICES FOR IMPLEMENTING A FUEL MANAGEMENT PROGRAM | COMPLETED | N/A |
|---|--------------------------|--------------------------|
| Review current fuel charges, billing and payment systems and track each current expense. This will allow you to create a baseline from which to implement your program. | <input type="checkbox"/> | <input type="checkbox"/> |
| Identify basic information about your fleet such as: <ul style="list-style-type: none"> • Number and type of vehicles that you own • Number and type of drivers (positions held) employed by your company • Number of kilometers per week/month/year that your fleet travels • Budget information needed to manage your drivers • Current fuel tracking procedures; current fuel control practices | <input type="checkbox"/> | <input type="checkbox"/> |
| Consider the types of restricted cards that you may need for your drivers. These may be appropriate for delivery drivers but may not suit executives or sales personnel who need to make additional purchases. | <input type="checkbox"/> | <input type="checkbox"/> |
| Consider a limit to the number of transactions allowed per day per driver. | <input type="checkbox"/> | <input type="checkbox"/> |
| Consider the type of reporting level that would suit your company (detailed, summary or online). These reports keep your drivers accountable for their purchases and can track card misuse. Exception reporting also provides a complete description of card use including the vehicle, driver, location, date and time of transaction. | <input type="checkbox"/> | <input type="checkbox"/> |
| Determine what type of billing schedule would suit your company (daily, weekly or monthly). | <input type="checkbox"/> | <input type="checkbox"/> |

This checklist is merely a guideline. It is neither meant to be exhaustive nor meant to be construed as legal advice. It does not address all potential compliance issues with federal, provincial or local standards. Consult your licensed commercial property and casualty representative at The Reschini Group or legal counsel to address possible compliance requirements. © 2017, 2019 Zywave, Inc. All rights reserved.

| SELECTING A FUEL MANAGEMENT PROGRAM COMPANY | COMPLETED | N/A |
|--|--------------------------|--------------------------|
| Select a vendor from a varying list of fuel management suppliers. Many fuel companies and credit card companies have programs to manage fuel purchases. | <input type="checkbox"/> | <input type="checkbox"/> |
| Meet with several suppliers to determine which vendor meets your company's needs the best. Ask for special considerations if the offered programs are not quite right. | <input type="checkbox"/> | <input type="checkbox"/> |

| COMMUNICATING WITH DRIVERS | COMPLETED | N/A |
|---|--------------------------|--------------------------|
| When introducing a new fuel card program, outline the specifics to your drivers in the form of a fuel card policy document. | <input type="checkbox"/> | <input type="checkbox"/> |
| Work with your vendor to assist in training your drivers. | <input type="checkbox"/> | <input type="checkbox"/> |

In addition to a solid fuel management program, it is wise to administer some anti-theft practices into your workplace to protect your investments. Consider these recommendations and products to thwart theft.

| FUEL THEFT DETERRENT RECOMMENDATIONS | COMPLETED | N/A |
|--|--------------------------|--------------------------|
| Ask that drivers park in well-lit areas to discourage thieves from approaching vehicles and steal gas. | <input type="checkbox"/> | <input type="checkbox"/> |
| Purchase an audible alarm equipped with a motion or impact sensor that triggers a 120-decibel siren. | <input type="checkbox"/> | <input type="checkbox"/> |
| Place theft-deterrent decals on vehicles to warn thieves that the vehicle is protected by an alarm system. | <input type="checkbox"/> | <input type="checkbox"/> |
| Purchase fuel cap locks. | <input type="checkbox"/> | <input type="checkbox"/> |