MobileIQ Route Balancing Project Guide

About MobileIQ, Inc.

MobileIQ increases operating profits for companies making deliveries or service calls in a local area.

We have years of experience in all facets of route management:

- Reducing fleet mileage, route hours and vehicle needs
- Developing fleet performance scorecards for effective management
- Implementing turnkey route balancing projects to reduce costs
- Improving customer service

About Headlight™

A simple customer service tool that offers a smarter way to manage delivery routes.

- Simplifies daily route management tasks for the service department
- Connects with industry billing systems to synchronize customer and route data
- Provides important fleet and route metrics for better route management

ROUTE BALANCING PROJECT GUIDE

1 Project Organization

Project meetings and training sessions.

2 Web Applications

Headlight™ and the Project Manager.

3 Implementation Plan

Planned dates for all activities.

4 Workflow

Details for the entire project schedule from start to finish.

5 Address Book

Login and contact information.

www.gomobileiq.com

➊ Project Organization

MobileIQ provides the tools, procedures and experience needed to effectively route balance any fleet. However, the project results depend on you, your staff and timely input throughout the project. We'll provide expert analysis and recommendations, but your team really knows the customers, drivers and delivery area. That knowledge makes the implementation possible.

The internal project leader is a key player in making things happen. Active participation in the project meetings is critical for keeping things on schedule and getting the best possible results. Discuss this with your team and agree to make route balancing a priority for everyone involved.

PROJECT MEETINGS & TRAINING SESSIONS

MobileIQ will host regular webinars throughout the project for training and project updates. These online meetings are held using GotoMeeting and a conference call line. The webinars provide project updates, "what-if discussions" and hands-on Headlight™ training. It allows team members to ask questions, share ideas and discuss concerns. The project leader should also schedule a weekly internal status meeting with everyone involved since early communication greatly reduces problems down the road.

During the training webinars, MobileIQ will demonstrate different facets of the software and project management. The sessions are interactive – everyone can "take the controls" and perform procedures with assistance. Experience has shown that hands-on training sessions are far more effective for learning than calling technical support or reading a printed manual.

INTERNAL REVIEW MEETINGS BETWEEN MANAGERS & PROJECT LEADER

Communication between management and the internal project leader are crucial to keeping the project on schedule. Most delays are caused by inadequate communication between team members and the project leader. It's necessary to have everyone on the same page at all times. The project leader is responsible for distributing information to the right people, keeping team members updated and communicating each project step.

❷ Web Applications

HEADLIGHT™

Headlight™ is a suite of web applications that makes Route Balancing possible. Both MobileIQ and clients use Headlight™ to collect route data, analyze routes, review potential route changes (called route scenarios) and perform ongoing route maintenance after the Route Balancing has been completed. When using Headlight™, MobileIQ staff can share the user's screen to provide interactive training, answer questions and offer technical assistance.

ONLINE PROJECT MANAGER

MobileIQ also uses an online project management application. It shows the complete project schedule, tasks, dates and contact information for all team members. The project steps (Milestones) are linked to calendar dates; specific tasks required to complete each Milestone are called To Do(s). The included Project Checklist include both Milestones and To Do(s). During the Kickoff Meeting, completion dates will be chosen and recorded on the Project Checklist.

The website includes a message board for posting all questions and files related to the project. After making a post, users select the people to be included in the discussion thread. Each recipient receive an email message and can post additional comments on the message board. These comments are integrated into a continuous thread for ease of reading. Since all messages and comments are located in one place, the message board is much more effective for managing group communications than using standard email.

The message board also contains instructions, reports and data. Using the message board, questions can be asked and/or answered by anyone and referenced from any web browser. This saves time information is needed about a common task that has already been discussed. The Project Manager greatly helps keeps things on schedule.

Each member of your team will receive a login and password for the Project Manager which can be changed at any time. Record this information on the Important Information sheet for future reference. Once logged in, users can edit their contact information including email, address, phone and fax number(s).

❸ Implementation Plan

Milestones & To Do(s)

	Milestone	To Do(s)	Notes
❑	Set Up Headlight™ Account	Upgrade to Paid Account	Select plan based upon number of delivery contacts to be managed
		Invite Additional Users	Users select unique usernames and passwords
❑	Contact Data	Prepare initial data snapshot (if needed)	Initial data may not include full product and/or service time information
		Create Data Bridge	The Data Bridge keeps Headlight™ data updated automatically
			Involve Customer IT Support (internal or external) as needed. Specifications and instructions are available on the website
		Import contacts into Headlight™	
❑	Data Validation	Verify delivery schedule, depot location(s), routes	Do you use a fixed or bump delivery schedule? Do you plan on switching to a bump schedule?
		Verify contact map markers (as needed)	
		Validate contact addresses, routes, & product information	
		Create/verify service time estimates	
❑	Set Routing Parameters	Review current route design and route log data	
		Establish objectives and/or restrictions for Route Scenarios	This is done during an online meeting with the

	Milestone	To Do(s)	Notes
			Project Manager
		Determine handling of Special / Will Call contacts and frequency changes	Should these be included in the Route Scenario?
❑	Determine Customer & Staff Notification Process	Notice to delivery contacts of upcoming changes	e.g. Invoice inserts, letters, flyers, bottle hangers, email notices
		Notice to delivery contacts of new route assignment	e.g. flyers, inserts, bottle hangers, MobileIQ Route Calendars
❑	Scenario Review & Approval	Project Leader and Project Manager review metrics and route scenario	
		Scenario reviewed in detail by appropriate internal personnel	Check route territories, route day areas, product loads, large deliveries, etc.
		Scenario approval	
❑	Load Up Period	Number of weeks required	Are additional people required to handle load up? Is there a plan for getting extra personnel if needed?
❑	Use Headlight^{TM} to route New Customers		Route assignment will be based upon new routes, not current ones
❑	Distribute new Route Calendars		Distribution should be approximately 2 weeks prior to Go Live date (to minimize customer calls)
❑	Update internal system(s)	Schedule billing system update with IT Support	Coordinate so all appropriate load reports, delivery tickets, and/or handheld updates are available on schedule
		Verify new routes are transferred accurately	Having a test database allows checking before

	Milestone	To Do(s)	Notes
			updating your production system
		Communicate changes to all internal personnel	
		Generate all required reports, lists, and route books for all affected personnel	
❑	Implement new routes	Go Live date	
	Post-Implementation Follow up and route maintenance	Use Headlight™ to route new customers and fix misrouted customers	Reports and metrics to monitor ongoing route efficiency
		Schedule Special / Will Call deliveries with Headlight™	
		Collect Route Log data for post-implementation analysis	

Implementation Plan

	Implementation Plan	Target Date	Completion Date
❑	Set Up Headlight™ Account		
❑	Import contact data into Headlight™		
❑	Validate contact data		
❑	Establish Routing Parameters		
❑	Notify Delivery Contacts of upcoming changes		
❑	Approval of Scenario		
❑	Product Loadup Start		
❑	Route new customers (using new routes)		
❑	Distribute Route Calendars		
❑	Product Load up Finish		
❑	Update client production system with New Routes		
❑	Go Live with New Routes		

4 Workflow

ACCOUNT SETUP

After setting up a paid Headlight™ account, the Administrator sends invitations to each team member. Each user receives a unique username and password that allows them to use Headlight™ from any web browser. While live customer data is being validated, the Test Drive database lets users start exploring Headlight™ immediately.

A one-time "data snapshot" can be used for pulling customer data. This is usually done manually by the billing system vendor or IT support staff. However, it's much preferable to install a Data Bridge between the billing system and Headlight™. This updates customer and route information including product prices, product quantities and delivery history automatically each night. Up-to-date information makes the route scenarios more accurate and the implementation easier, since manual updates tend to happen irregularly.

CHECK OFF WHEN COMPLETED

- [ ] Setup Headlight™ accounts
- [ ] Client setup of Headlight™ account
    - Add holidays to Delivery Calendar
    - Configure Branch and/or Depot locations
- [ ] Headlight™ Administrator invites additional members
- [ ] Install and configure read-only Data Bridge
- [ ] Initial data snapshot

GETTING STARTED

The project leader sends fleet and route information to MobileIQ, obtains necessary hardware (if needed), verifies users can access Headlight™ and schedules the Kickoff Meeting. All team members should attend to discuss project goals and review Headlight™.

CHECK OFF WHEN COMPLETED

- [ ] Configure 19" LCD displays (or larger) running 1280 x 1024 (or higher)
- [ ] Attend training webinar
- [ ] Complete Route Logs with hours and mileage data (on website)
- [ ] Complete Fleet Information Form (truck capacities, etc.) (on website)
- [ ] Provide product seasonality data (if applicable - form available upon request)
- [ ] Fax completed forms to MobileIQ @ 732.812.4080

DATA VALIDATION

CHECK OFF WHEN COMPLETED

- ❑ Client verifies all delivery contact map markers
- ❑ Client verifies delivery and will call contacts, quantities, service times and revenues
- ❑ Client updates customer service times for large and/or special deliveries
- ❑ Client updates business hours and closed times

CLIENT DISCUSSION

CHECK OFF WHEN COMPLETED

- ❑ Assign responsibility for customer notification letters and route calendars
- ❑ Discuss procedures for testing/uploading approved route scenario
- ❑ Decide on customer notification method
- ❑ Discuss loadup timeframe and implementation details
- ❑ Discuss making extra deliveries (during implementation transition)
- ❑ Discuss switching to bump calendar

ROUTING SCENARIOS

MobileIQ reviews all completed Route Logs. Any problems with current route hours - including off-route time and activities – are reviewed and discussed. After getting feedback from the service department, one or more draft Route Scenarios are created. Clients review the Route Scenario(s) and select one for implementation. The approved scenario is adjusted as required and implementation reports are printed.

After approving a routing scenario, the client should route new customers against the routing scenario - not against the current routes. **New customers assigned using the current routes will be incorrectly routed after Go Live. Headlight™ will do this automatically when using Suggest Routes.**

CHECK OFF WHEN COMPLETED

❑ Analysis of Route Logs

❑ Discuss route scenario parameters
- Numbers of routes and/or route-days
- Length (# of hours) of route-days
- Targeted truck volumes
- Product Volume Seasonality
- Special routes (e.g. bulk, different truck type)
- Special customer account treatment

❑ Perform analysis & create routing scenarios

❑ Review route scenarios, management selection and sign-off

GO LIVE

Inform the customers about potential route changes over the next several weeks. This can be done in many different ways: verbally, bottle hangers, flyers, letters, phone call and/or MobileIQ Route Calendars. At the same time, customers should be getting extra product (as needed) to prevent shortfalls. The idea is to minimize inbound customer calls during implementation and communicate clearly with the customers. **Note: Printing a generic message on the billing invoice is not recommended. Most customers won't take notice.**

CHECK OFF WHEN COMPLETED

❑ Client selects the Go Live date

❑ Generate necessary reports: Product Shortfall, Transfers, Driving Directions etc.

❑ Customer notification

❑ Schedule upload of new routes to billing system (check upload in a test database first)

5 Address Book

HEADLIGHT™

LOGIN INFORMATION

HeadlightTM	https://applications.gomobileiq.com/login
Username	unique - created by each individual user
Password	unique - created by each individual user

LOGIN INFORMATION

Project Manager	http://mobileiq.clientsection.com
Username	Each team member will receive a username by email
Password	Each team member will receive a password by email

MobileIQ Contact Information

MobileIQ Website	www.gomobileiq.com
Project Manager	Greg James 866.261.8600 x708 email: gjames@gomobileiq.com
Customer Support	866.261.8600 x 703 email: support@gomobileiq.com
Billing	866.261.8600 x 704 email: billing@gomobileiq.com

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MILESTONES

CHECK OFF WHEN COMPLETED — EXPECTED COMPLETION DATES

- ❑ Installation & Setup ____________ / ____________
- ❑ Data Collection Completed ____________ / ____________
- ❑ Route Scenario Approved ____________ / ____________
- ❑ Customer Notification ____________ / ____________
- ❑ Route Calendars Mailed ____________ / ____________
- ❑ Product Loadup Start ____________ / ____________
- ❑ Product Loadup Finish ____________ / ____________
- ❑ Go Live with New Routes ____________ / ____________

CUSTOMER NOTIFICATION

CHECK OFF WHEN COMPLETED — EXPECTED COMPLETION DATES

- ❑ Insert mailed with customer invoice ____________ / ____________
- ❑ Letter mailed to customer ____________ / ____________
- ❑ Customer flyer distributed by driver ____________ / ____________
- ❑ Bottled hangers distributed by driver ____________ / ____________
- ❑ Route calendar postcards ____________ / ____________
- ❑ Other (include short description) ____________ / ____________

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PRODUCT LOADUP

Number of weeks required? ❑ no loadup ❑ 2 weeks ❑ 4 weeks

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FLEET INTELLIGENCE FOR SMALL BUSINESS

Are additional people required to handle loadup?	❑ yes	❑ no
Is there a plan for getting extra personnel if needed?	❑ yes	❑ no
Are there P/E routes requiring special loadup procedures?	❑ yes	❑ no
Switching to a bump schedule from a fixed schedule?	❑ yes	❑ no

ROUTE CALENDARS

			EXPECTED COMPLETION DATES
Client will handle route calendars?	❑ yes	❑ no	________ / ________
MobileIQ will handle route calendars?	❑ yes	❑ no	________ / ________

NEW CUSTOMER ROUTING

Is Headlight used for routing new customers?	❑ yes	❑ no
If no, is there a plan for new customers after Go Live?	❑ yes	❑ no

APPROVED BY:

Printed ____________________

Signed ____________________ Date: ____________

Printed ____________________

Signed ____________________ Date: ____________

Printed ____________________

Signed ____________________ Date: ____________