



1

DRIVER SCORECARDS

This webcast will cover ...

- A regulatory overview
- Best practices in compliance
- A case study in implementation
- Question & Answer
- You will be muted during the event.
- Please use the Q&A feature to send in questions. We'll try to answer them during the Q&A period if they are not covered in the presentation.
- The slides and recording will be posted within 7 days at: www.jjkeller.com/nptcinfo

Thank you for joining us!



2021 © All Rights Reserved



2

HOUSEKEEPING

<p>Before we begin, clear your browser's cache (Ctrl + Shift + Delete)</p>	<p>Audio is streamed through your computer speakers (no dial-in number)</p>	<p>For optimal experience, launch the presentation in Microsoft Edge, Chrome, or FireFox (Mac)</p>	<p>Download the webcast handouts and slides from the resource box</p>
<p>If you need additional assistance, click the ? icon to access the Event Help Guide</p>	<p>If you experience audio issues or slides are not advancing, refresh your browser by clicking F5</p>	<p>Send your questions through the Q&A box anytime during the event</p>	<p>Tell us how we did in the post-event survey</p>

2021 © All Rights Reserved

3

Meet Your Presenters



Gary Petty
President & CEO
National Private Truck Council



Tom Bray
Industry Business Advisor
J. J. Keller & Associates, Inc.



Tom Moore, CTP
Executive Vice President
National Private Truck Council



Eric Delesus, CTP
National Fleet Safety Manager
Pitney Bowes, Inc.



Samantha Lee
Distribution Continuous Improvement
Coordinator
Upstate Niagara Cooperative



4



FMCSA Regulations

Tom Bray



2021 © All Rights Reserved



5

FMCSA Requirements

- No direct "scorecard" or driver performance scoring required
- Driver must stay qualified (shared responsibility)
- Carrier must do an annual review



2021 © All Rights Reserved



6

Staying Qualified (\$391.11 and \$177.816)

- License
- Medical card
- HM Training



2021 © All Rights Reserved



7

Annual Review (\$391.25 and .27)

- Certificate of Violations
- Annual MVR
- Note from Supervisor doing review
 - Supervisor must give "great weight" to indications the driver is no operating safely
 - No scoring, pass/fail, or required actions detailed



2021 © All Rights Reserved



8

J. J. Keller® Managed Services
Hand off time-consuming regulatory work to our skilled and tenured Managed Services team.

- Driver Qualification
- Drug & Alcohol
- Vehicle Services
- Hours of Service
- DOT Authority
- MVR Monitoring
- CSA Performance Suite

2021 DataSense Upgrades

PHASE 1 SUMMER 2021 COMPLETE	PHASE 2 SUMMER 2021 COMPLETE	PHASE 3 FALL 2021	PHASE 4 WINTER 2021
------------------------------------	------------------------------------	----------------------	------------------------

New Features Coming Soon!



Per official Board policy and practice, NPTC does not endorse or promote products and services provided by member companies which sponsor Council programs or events.

9



7 STEPS to Mining your CSA DATA

1. MAKE SURE YOU HAVE COPIES OF ALL REPORTS

2. LOOK FOR INACCURATE INFORMATION


3. USE DATA TO ENTER A REQUEST FOR DATA REVIEW

Ask How **J. J. Keller** Can Help and receive a Complimentary Compliance Brief



Per official Board policy and practice, NPTC does not endorse or promote products and services provided by member companies which sponsor Council programs or events.

10



J. J. Keller
A Division of
SINCLAIR

Best Practices

Tom Moore, CTP

11



2021 © All Rights Reserved

Why Measure Performance?

- You cannot get better at something unless it can be measured
- KPIs are quantifiable measurements used to evaluate progress towards achieving business goals
- They should be tied to the overall organizational strategy



2021 © All Rights Reserved



12

Key Performance Indicators (KPIs)

- Scorecards display various performance metrics that provide information on the current state of the business or individual performance.
- Scorecards are performance management tools that compare goals/expectations with results
- Metrics that tell an individual or an organization at a glance how it is operating
 - Against historical averages
 - Against competition
 - Against expectations
- There should be enough to judge the performance, but not so many as to be overwhelming.



2021 © All Rights Reserved



13

SMART Goals

- Having clear goals/performance requirements
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Time-based



2021 © All Rights Reserved



14

Typical Metrics

- Company goals
- On-time delivery
- Driver retention
- Fuel economy
- Safety
 - Accidents
 - Injuries
 - CSA scores
- Stops, cases
- Loss and damage claims



2021 © All Rights Reserved



15

Best Practices

- Establish the goals
- Establish the scoring
- Communicate
- Make it positive
- Train and coach your personnel
- Don't let it pile up
- Lagging vs. leading indicators



2021 © All Rights Reserved



16

Developing and Managing Driver Scorecards



Eric DeJesus, CTP
National Fleet Safety Manager
Pitney Bowes, Inc.



Samantha Lee
Distribution Continuous Improvement
Coordinator
Upstate Niagara Cooperative



2021 © All Rights Reserved



17

Outline

- Company introductions
- What is a balanced scorecard
- Pillars to measure performance
- Why we used the metrics we used
- Setting targets
- Good/bad
- Questions



2021 © All Rights Reserved



18

Upstate Niagara Cooperative



310 member farms
 Conventional
 Organic
 Supervised kosher
 Marketing 2.5 billion lbs. of milk per year



Complete control & ownership of milk supply from farm to customers
 Dedicated haulers & own distribution fleet



4 fluid-milk processing plants
 2 Cultured Dairy Manufacturing Plants
 1 Cheese Plant
 2 Specialty Beverage Plants



Farmer Owned Cooperative
 16th largest US dairy cooperative



2021 © All Rights Reserved



19

Upstate Niagara Cont'd

81 Straight Trucks
 175 Tractors
 323 Trailers



4 Distribution Centers
 2 Depots in PA
 7 Depots in NY



2021 © All Rights Reserved



20



Buffalo Plant
57 Drivers



Rochester Plant
67 Drivers



Upstate Farms
66 Drivers



Valley Farms Dairy
49 Drivers

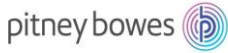
Upstate Niagara Cont'd



2021 © All Rights Reserved



21



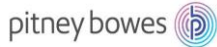
 <p>Mail Services</p> <p>548 Drivers</p> <ul style="list-style-type: none"> • 418 CDL • 130 non-CDL 	 <p>Third largest mailer in the world behind USPS and Germany post</p>	 <p>Our global Ecommerce division delivered 933 Million parcels in 2020</p>
<p>511 Vehicles</p> <ul style="list-style-type: none"> • 199 Tractor Trailers • 295 Box Trucks • 117 delivery vans 	<p>35% of mail delivered in the US is handled by PB Global Logistics</p>	<p>Cross border parcel operations</p>



2021 © All Rights Reserved



22



23

What is a Balanced Scorecard

- High level approach to measure driver's performance
- Monitored with strategic goals
- Easily quantified
- Drives change using key performance indicators
- Connects to company's overall objectives



2021 © All Rights Reserved



24

Four Pillars Used to Measure Performance

- Safety
 - Identify risky drivers
- Productivity
 - Deep dive into actual workflow
- Employee Development
 - Enhance employees' moral
- Quality
 - Critical to satisfying & retaining customers



2021 © All Rights Reserved



25

Metrics to Measure

Safety	Productivity	Employee Development	Quality
Incidents Crashes CSA Scores HOS Violations	Case's Delivered Labor Cost Route Utilization Compare Planned Verses Actual	Harsh braking Speeding Idling	After sales credits On time deliveries



2021 © All Rights Reserved



26

Setting Targets



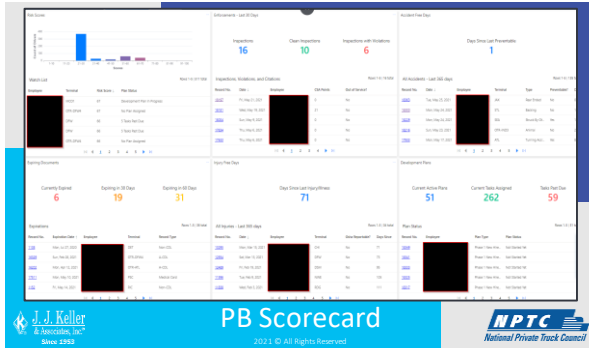
- Safety**
 - 0 Crashes
 - 0 Incidents
- Productivity**
 - Weekly overtime % ≤10%
 - Route utilization ≥ 80%
- Employee Development**
 - ≥ 6 MPG's
 - ≤ 4 idle hours per week
 - ≤ 2 gallons of fuel lost due to speeding
- Quality**
 - ≤ 3% customer shortages
 - 100% on time deliveries



2021 © All Rights Reserved



27



28

Upstate Niagara Scorecard

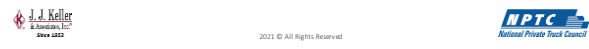
Weekly Distribution KPI Scorecard		Targets	4/7/2021	4/16/2021	4/17/2021	4/24/2021	5/1/2021	5/8/2021	5/15/2021	5/22/2021	%
Safety	Safety Incidents	0	0	0	0	0	0	0	0	0	0
	Driving Accidents	0	0	0	0	0	0	0	0	0	0
	Route Ride - Alongs Completed	1	4	1	4	4	4	4	4	4	0
	Safety Observations Completed	1	20	20	20	20	20	20	20	20	40%
	Altitude Completed %	100%	20%	20%	20%	20%	20%	20%	20%	40%	52%
Compliance	NPTC Issues	0	0	0	0	0	0	0	0	0	0
	OSD Issues	0	0	0	0	0	0	0	0	0	0
	# of Specials	0	4	4	4	4	4	4	4	4	4



29

Upstate Niagara Scorecard

Performance	Cases Delivered	25,917	26,363	26,704	27,055	27,527	28,033	28,528	29,072
	TRP	139	128	128	133	132	131	127	127
	Projects	14,038	15,079	12,198	11,907	10,035	19,413	15,799	14,062
	Miles	1,996	1,985	1,951	1,832	1,129	607	176	385
	Callouts	1,440	1,400	1,440	1,299	1,352	1,400	1,320	1,320
	Total Hrs	147	226	410	243	250	261	262	257
	OT Hrs	6.0	6.5	6.3	5.9	6.8	7.3	7.2	7.4
	Cost/Case MFG								
Metrics	OT %	30%	28.2%	23.4%	19.2%	19.3%	19.4%	19.3%	23.2%
	Cost / Meter	40.0	35.1	38.0	36.7	33.4	32.8	33.1	31.2
	Cases / Leg (Route)	672	612	631	609	595	613	606	606
	Cases / Mile	4.6	5.7	5.2	6.6	6.8	7.0	4.1	6.0
	Utilization%	80%	83.5%	82.4%	82.1%	81.5%	82.3%	87.5%	85.5%
	# of Routes Under 65%	1	0	0	0	2	2	2	2
	MFG	6.0	7.0	7.6	7.9	7.3	6.3	7.0	7.1
MFG Efficiency%		117.4%	118.9%	125.0%	123.7%	95.5%	95.5%	97.2%	96.5%



30

Employee Performance

Employee	Rating	Target	Actual	Weighted	Actual	Target	Weighted	Actual	Target	Weighted	Actual	Target	Weighted	Actual	Target	Weighted	Actual	Target
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50
McIntyre	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50



2021 © All Rights Reserved



31

What Do I Do With It?

- Coaching
 - Timely the sooner the better
 - Concise
- Feedback sandwich
 - Open with praise
 - Offer the criticism
 - Close with some more praise
 - Other coaching methods available
- Action items
 - Execute your strategy
 - gathering data regularly
 - Adjusting as needed



2021 © All Rights Reserved



32

Do Differently

- Personal in place before implementation
- Managers who do coaching
 - Do managers need training on how to coach?
 - Following good coaching practices
- Make sure policy reflect any corrective action and coaching your scorecards would require
- Over educate your drivers on how the scorecards will impact them



2021 © All Rights Reserved



33

What Works/Doesn't Work

- Drivers feeling “big brother” is watching
- Poor coaching of risky behaviors
 - Driver managers using scorecards
- Lack of personnel to monitor
- Keeping your metrics relevant
- Considering leadership feedback
- Reporting on a consistent basis



2021 © All Rights Reserved



34

Question & Answer Session



Gary Petty
President & CEO
National Private Truck Council



Tom Bray
Industry Business Advisor
J. J. Keller & Associates, Inc.



Tom Moore, CTP
Executive Vice President
National Private Truck Council



Eric Delesus, CTP
National Fleet Safety Manager
Pitney Bowes, Inc.



Samantha Lee
Distribution Continuous Improvement
Coordinator
Update Niagara Cooperative



35

More Questions?



Tom Bray
Sr. Industry Business Advisor
J. J. Keller & Associates, Inc.
tbray@jkkeller.com



Tom Moore, CTP
Executive Vice President
National Private Truck Council
tmoores@nptc.org



2021 © All Rights Reserved



36

Please Join Us for Our Next Webcast



Gary Petty
President & CEO
National Private Truck Council

FMCSA's Drug and Alcohol Clearinghouse
October 27th – 10:00 AM Central

Visit www.jjkeller.com/nptcinfo to register



2021 © All Rights Reserved



37

Thank You for Participating in Today's Webcast!

Visit: www.jjkeller.com/nptcinfo
for today's presentation and to learn more about
future NPTC and J. J. Keller webcasts



2021 © All Rights Reserved




38


Content Disclaimer

Due to the constantly changing nature of government regulations, it is impossible to guarantee the total and absolute accuracy of the material contained herein or presented.

J. J. Keller & Associates, Inc. and National Private Truck Council cannot and does not assume any responsibility for omissions, errors, misprinting or ambiguity contained. J. J. Keller and NPTC shall not be held liable in any degree for any loss, damage or injury caused by any such omission, error, misprinting or ambiguity present. It is made available with the understanding that J. J. Keller and NPTC are not engaged in rendering legal, accounting or other professional service. If legal advice or other expert service is required, the services of such a professional should be sought.



2021 © All Rights Reserved



39
