



2022 CIPMM

Fleet Management Workshop

November 15, 2022

Holman
Driving What's Right

Holman  Driving What's Right

HOLMAN

Global Fleet & Mobility Management

- United States
- Canada
- Mexico
- United Kingdom
- Germany

FLEET & MOBILITY

Commercial & Consumer Insurance Services

- Licensed in **48 States**
- Aligned with Top-Tier Carriers

Auto Dealerships

- **39 Franchises and 21 Brands**
- Locations in **9 States**

RETAIL

Manufacturing & Assembly

- **14 Locations** in North America
- Aligned with OEM Production Network

MANUFACTURING & PRODUCTION

Parts Sales, Distribution & Core Collection

- **10 U.S. Distribution Locations**
- Ford, GM, FCA and Other OE Brands



Global automotive leader serving commercial and consumer clients The Holman Way by always doing the right thing for our people, our customers, and the community.





Fleet & Mobility

1.7m+

vehicles
managed in
North America

2,822

customers
for leasing & fleet
management
services

2,100

employees
worldwide
(US, CAN, MX,
UK, & DE)

20%

of operating
budget invested
into systems &
technology

leasing & acquisition • vehicle & driver management • fleet technology • business intelligence & analytics
broader Holman competencies include: vehicle upfit • risk consulting • parts sourcing



company purpose,
values, & principles



performance excellence &
employee engagement

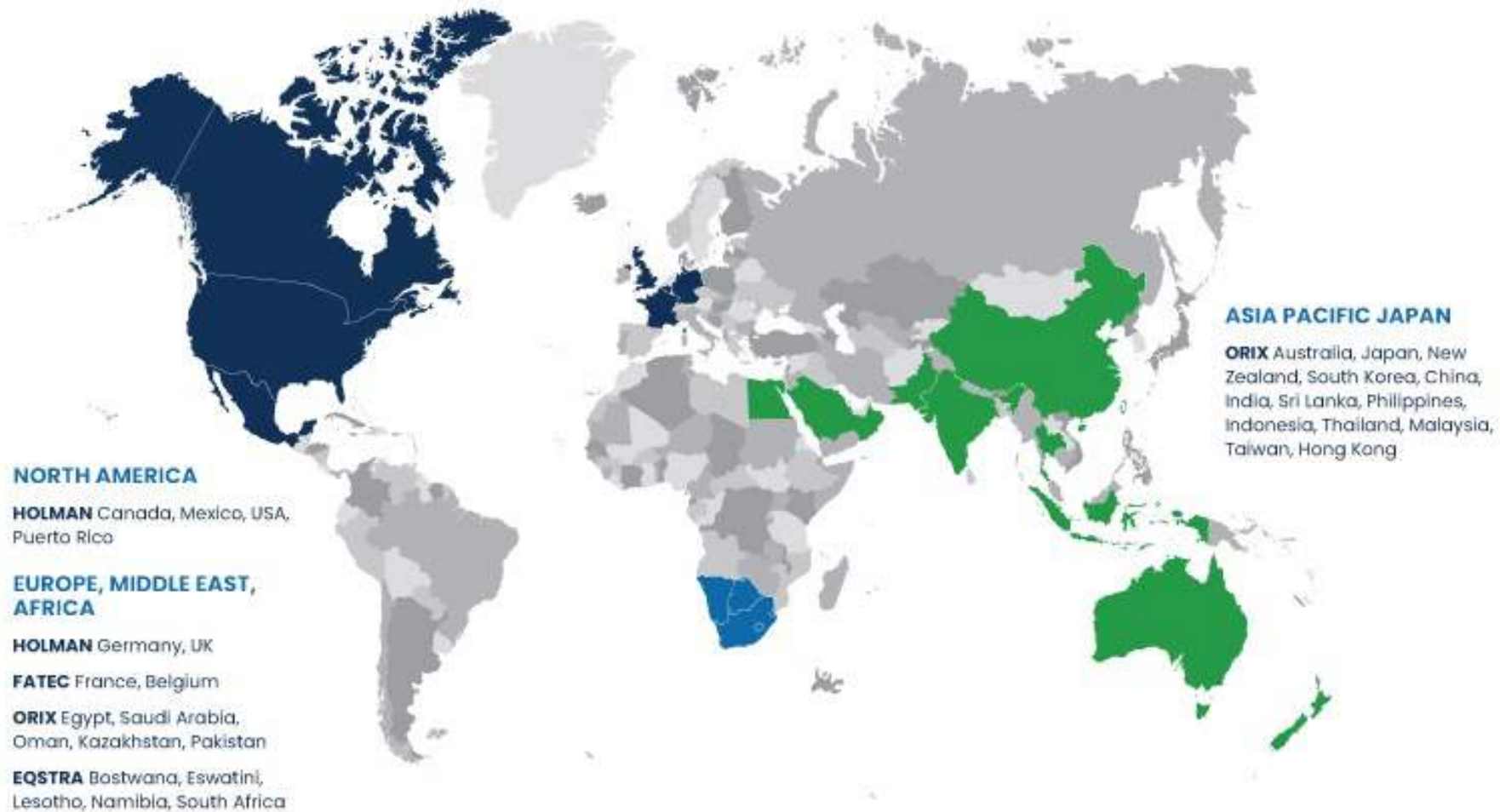


training &
development



certified as
diverse supplier

Holman | Global Coverage Map



30 Countries via Global Fleet Services Alliance | Global Administration

Government Fleet Snapshot

76,419

Managed Government
Vehicles in Canada

2,800

North American Customers

1.7 Million

North American
Vehicles

Holman Services

MAINTENANCE MANAGEMENT	GARAGE MANAGEMENT
TELEMATICS	PERSONAL USE REPORTING
VEHICLE FUNDING	SUPPLY CHAIN MANAGEMENT
VEHICLE REMARKETING	BUSINESS INTELLIGENCE & ANALYTICS
ACCIDENT MANAGEMENT & SUBROGATION	FUEL MANAGEMENT
DRIVER MVR, COMPLIANCE, & SAFETY	TOLL & VIOLATION MANAGEMENT
FLEET ADMINISTRATION	LICENSE & TITLE MANAGEMENT
FLEET TECHNOLOGY	DATA INTEGRATION



The Supply Chain Landscape

An aerial photograph of a two-lane asphalt road winding through a dense forest. The trees are in various shades of green and yellow, suggesting an autumn setting. A white semi-truck is driving on the road, moving away from the viewer. The road has white lane markings and a shoulder on the right side.

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Automotive Supply Chain Update

Timeline – COVID to Present Day



Global pandemic



Labor and parts shortages



Fleet production still short 1.4M

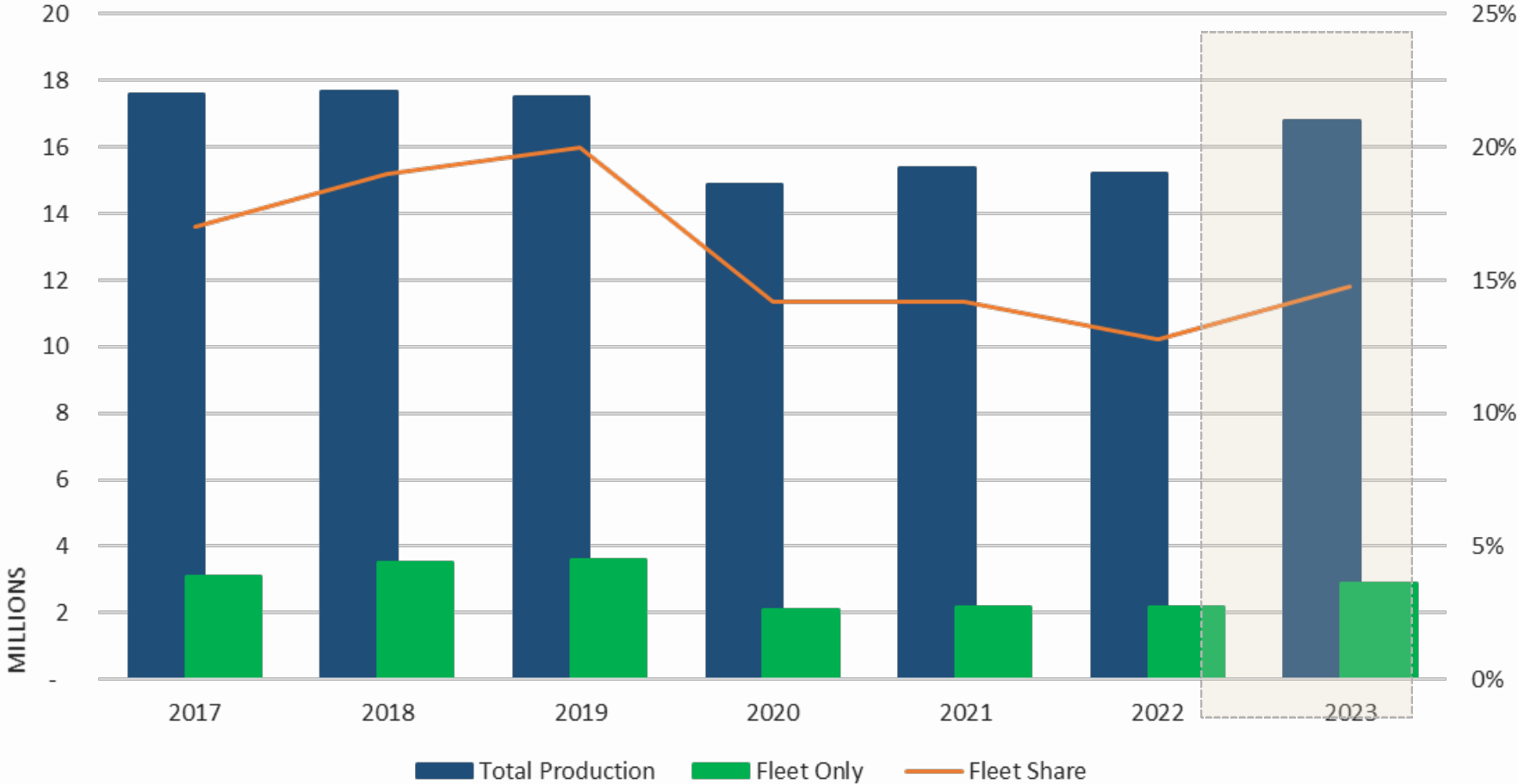


OEMs struggle to balance demand & order volume.



Full year outlook is 14.5M vehicles

US Vehicle Production & Fleet Share

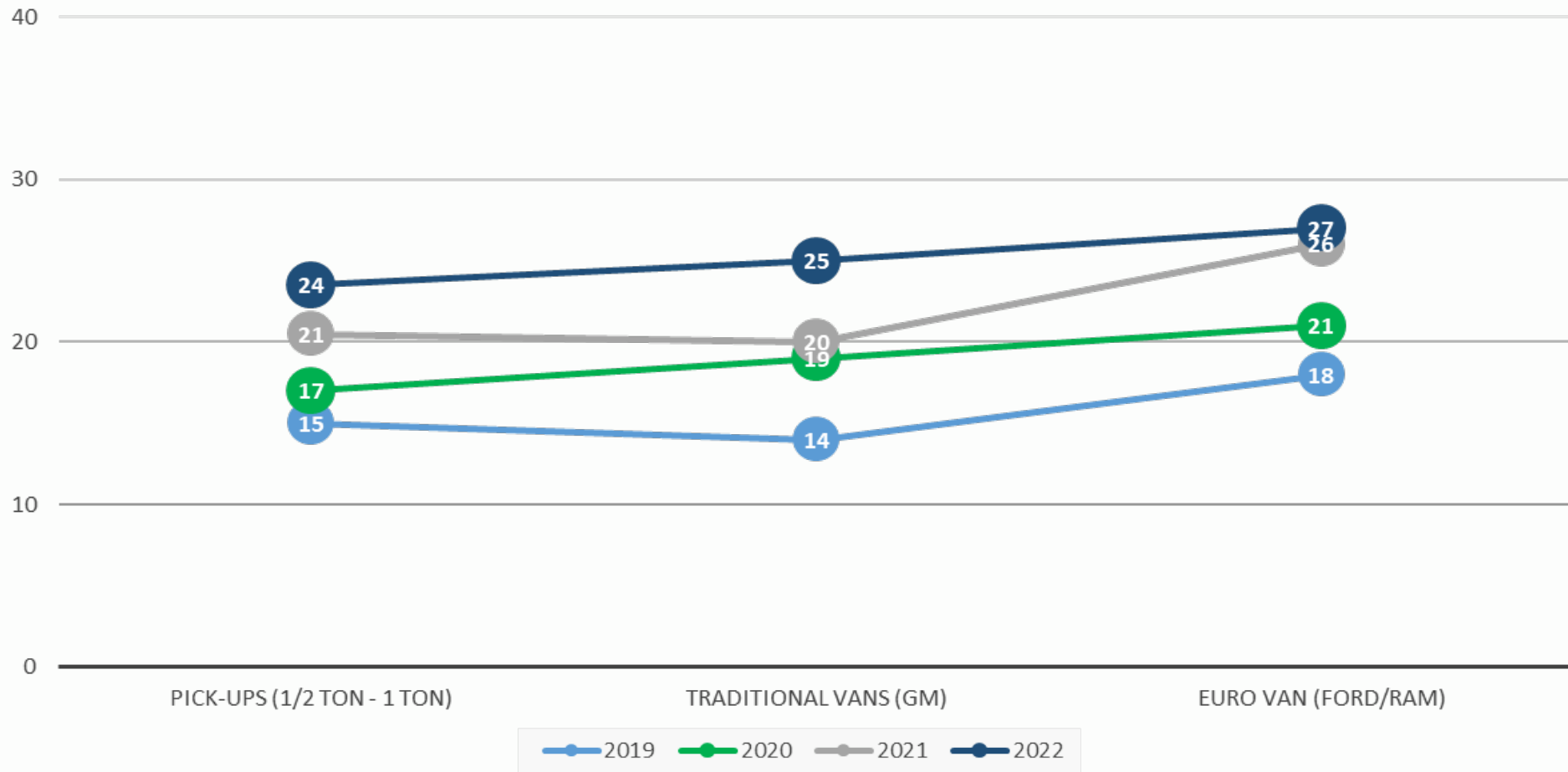


2023 shows a marginal improvement

shift to retail.

Vehicle
Production

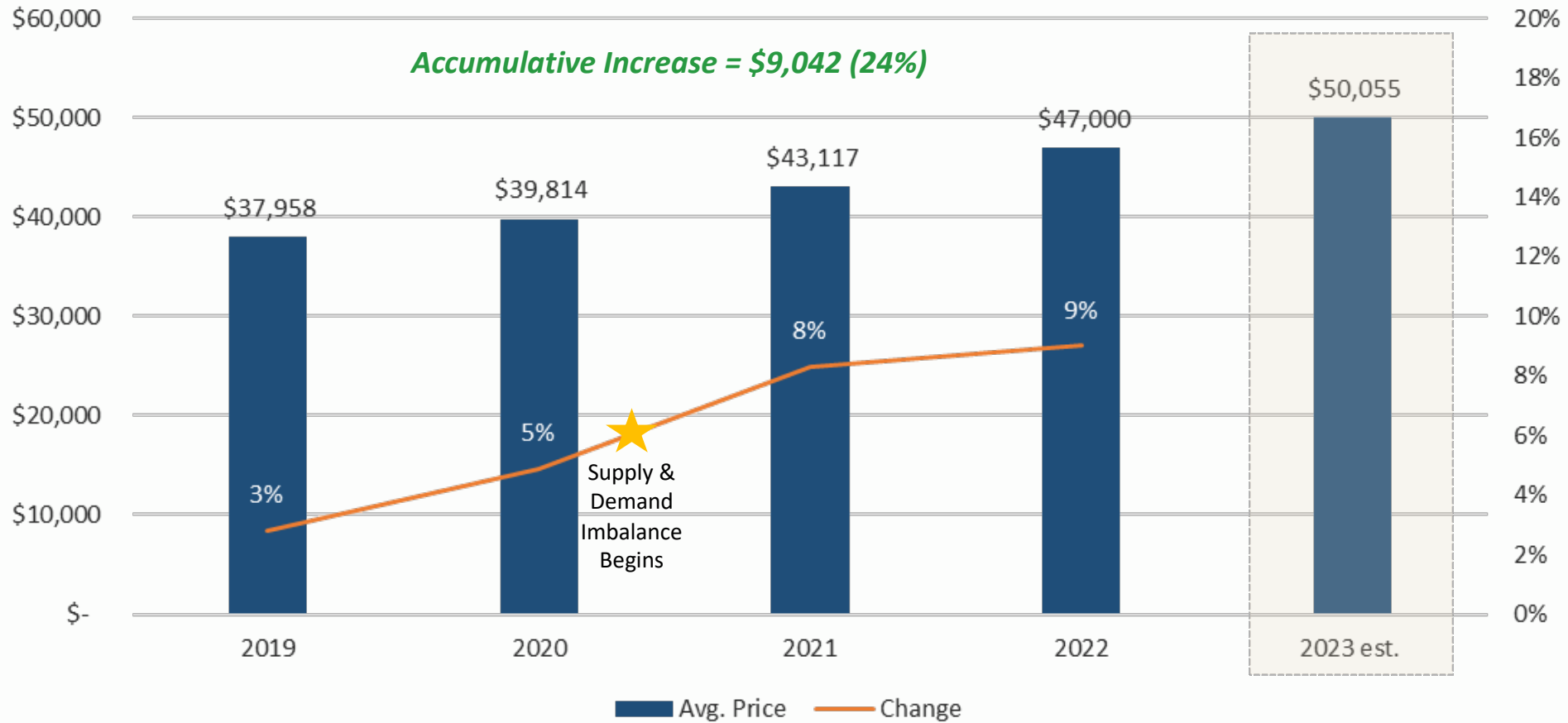
Lead-Times YOY



increased by at least 50%

Key Model
Lead-Times

Average Transaction Price



Strong demand

upward price pressure

**New Vehicle
Pricing**



Upfit & Components

Upfit Outlook

Component Suppliers



Lead Times Significantly Extended
Instances of Past-due / missed
shipments up **110%** since pre-
pandemic

Labor Availability



Challenging Labor demands in all
manufacturing Markets

Upfit Lead Time



Manufacturing locations
face record backlog



Inflation Update

Inflation in Upfit Supply Chain

Upfit Components



Component Costs up
23% vs. Q2 2021

Freight Cost



Freight Costs up ~**100%** since
pre-pandemic, but outlook is
improved.

Labor Cost



Since 2020:
Direct Labor (mechanic) **+12%**
Indirect Labor (support) **+23%**

Inflation in Manufacturing Supply Chain continues to
compound overall costs of fleet assets.

Acquisition Costs On The Rise

Interest Expense



Interest & Admin costs are up **109%** over 2020



Invoice Prices



Vehicle Pricing is up **9%-14%** over 2020

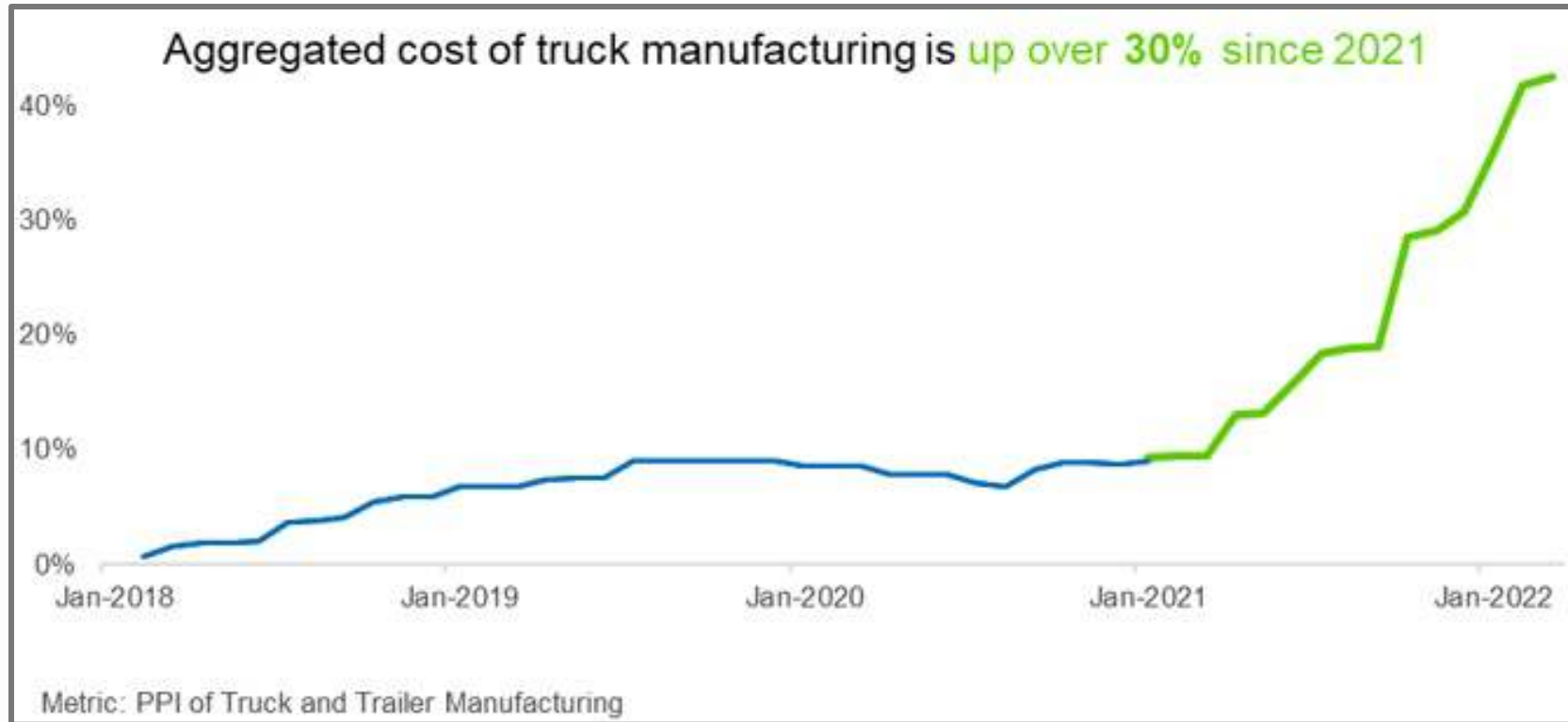


OEM Discounts



Reductions **exceeding 50%** of 2020 discount level

Inflationary pressures will continue to have a **significant impact** on overall costs associated with **fleet budgeting & planning**.



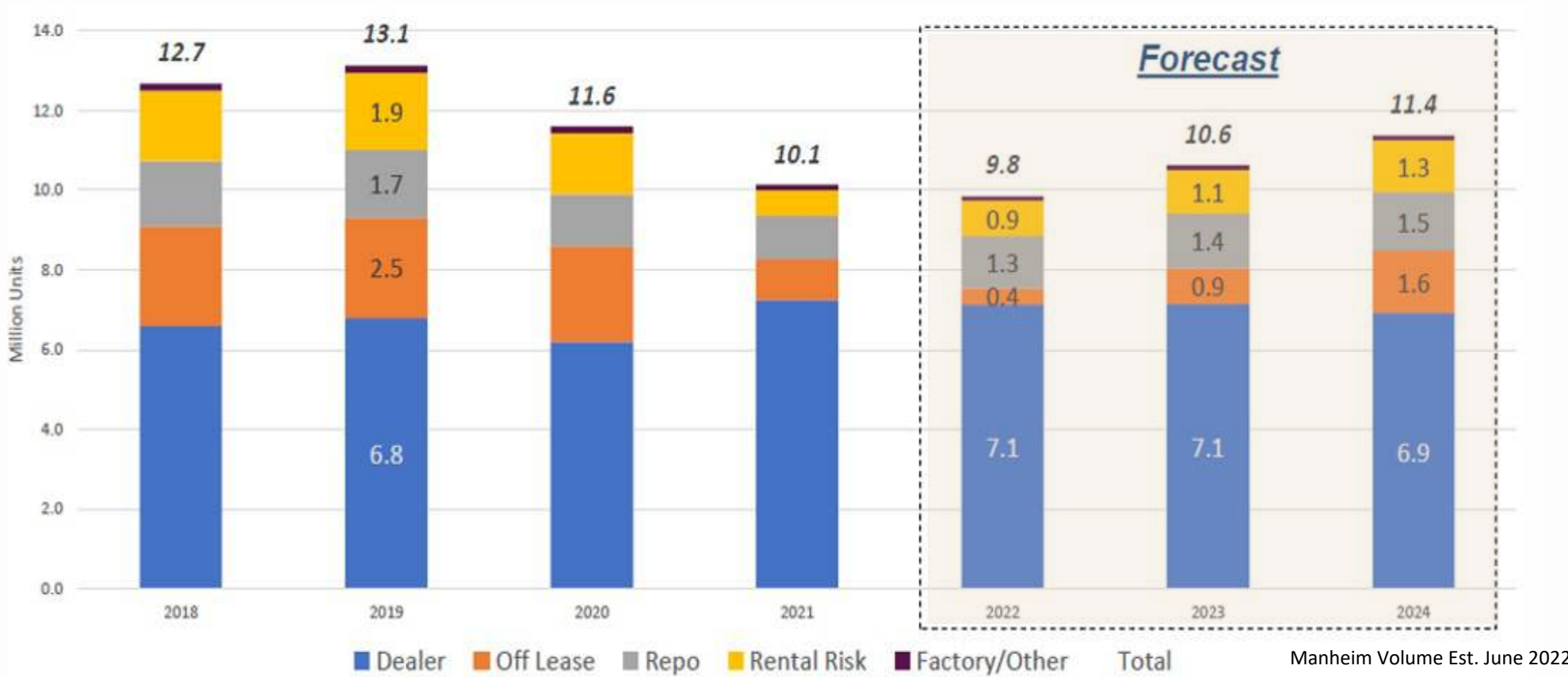
Since 2020, both *labor and raw material* costs have increased by at least **20%**, while chip shortages added to the backlog of demand and resulted in **7.7 million fewer vehicles** being produced.

Production Costs
Are Impacted



Remarketing Outlook

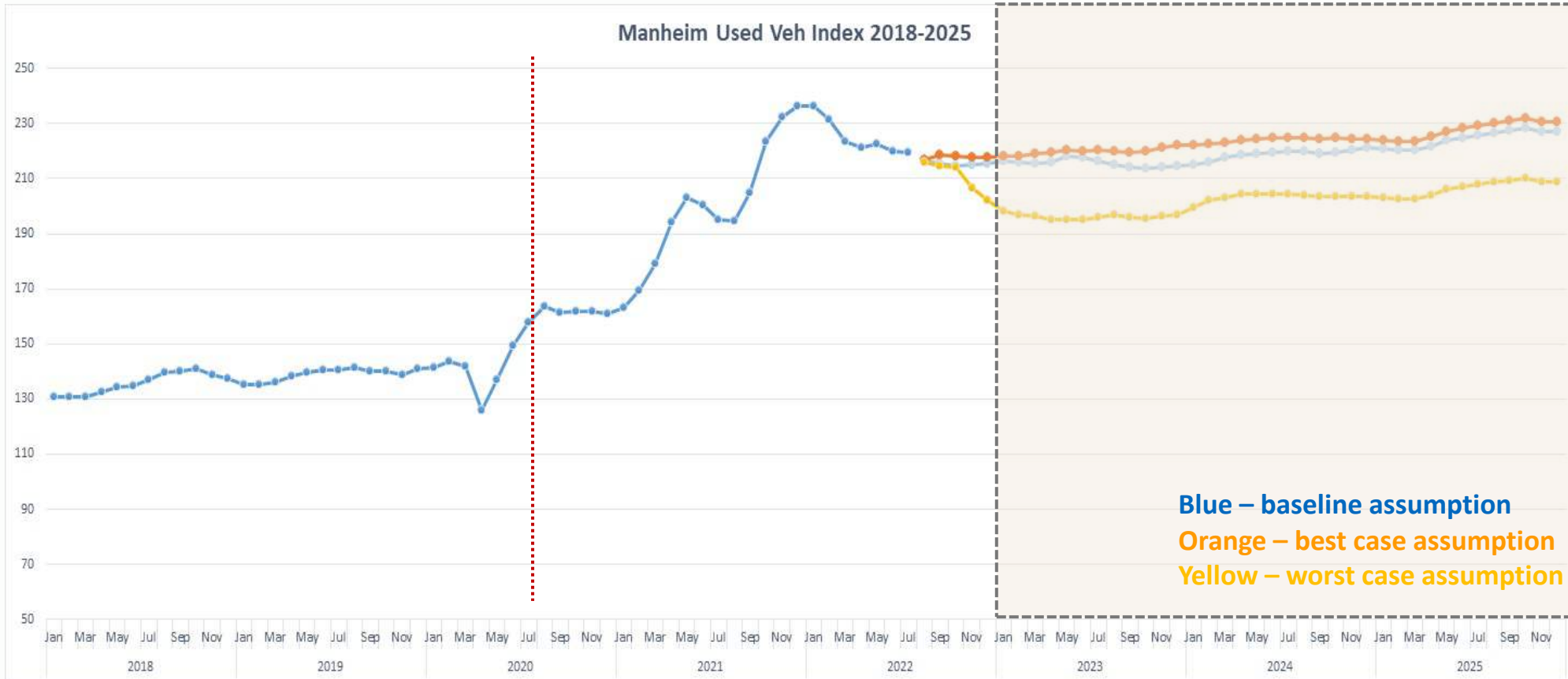
Available Wholesale Inventory



10% below pre-pandemic

Used Vehicle
Inventory

Wholesale Pricing Trends



peaked in early 2022 with prices falling slightly

Used Vehicle Pricing

Preparing Together



Plan proactively and collaboratively.



Keep lines of **communication** open with OEM partners.



Maintain **flexibility** in all areas of supply chain.



Holman is **investing** to maintain agility in current environment.

Customer Experience Technology Evolution

An aerial photograph of a two-lane asphalt road winding through a dense forest. The trees are in various shades of green and yellow, suggesting an autumn setting. A white semi-truck is driving on the road, moving away from the viewer. The road has white lane markings. The overall scene is captured from a high angle, looking down at the road and the surrounding woods.

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Customer Experience Technology Evolution


GUIDING PRINCIPLES

- Improve the Service Experience
- Align to Personal Experiences
- Make it Easy & Intuitive
- Create Value Add Opportunities

TARGET AUDIENCE

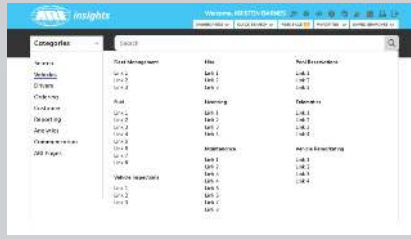


Customer Experience Journey




Driver Mobile App

Complete




Look and feel Enhancements

Complete



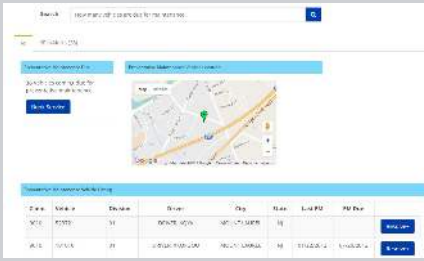
API Data Layer

Complete



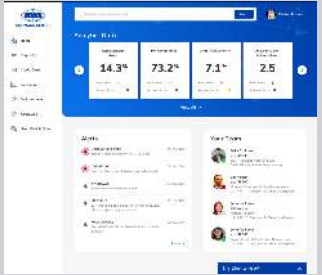
Analytics Tools

Complete



Insights Platform Enhancements

Jan 2021 – Dec 2022



Fleet Manager App

Aug 2022 – Dec 2023

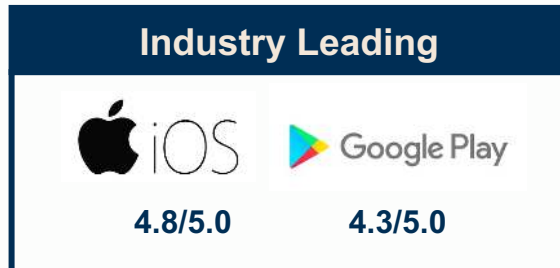
Driver Mobile App

Vision for Drivers

Empower drivers with an industry leading mobile solution which provides **easy access** to the information and operational tasks they need to **minimize their time spent on fleet** and **maximize their time spent on core job functions**.

Vision for Fleets

Provide our fleet customers with a mobile solution which **empowers their end users** in an **intuitive tool** which **optimizes fleet operations** and maintains the **appropriate measures of control and security**.



Content Summary

General

- Vehicle Dashboard
- Alerts & Notifications
- What's New
- Safety Reminder
- Help
- Feedback
- Switch Vehicle
- Settings
 - Language
 - Notifications
 - Password Mgmt.

Driver Safety

- MVR Request
- Driver Safety Scorecard

Documents

- View Vehicle Document
 - Registration
 - Insurance Card
 - Other

Fuel

- Find Stations
- Retrieve Your PIN
- Fuel Transaction History
- Request Replacement Card

Licensing

- Status
- Update Plate Information
- Violations
- Request Replacement

Maintenance

- Find Maintenance Vendor
- Vehicle Inspection
- Preventative Maintenance Schedule
- Recalls
- Schedule Glass Repair
- Roadside Assistance
- Schedule Service (NA Vendor Only)
- Service History

Accidents

- Report a Claim
- Status of a Claim

Mileage

- Review Mileage History
- Enter/Update Mileage
- FAQs
- Imputed Income
- Odometer History

Ordering

- Order Status
- Update Delivery Date
- Update Registration

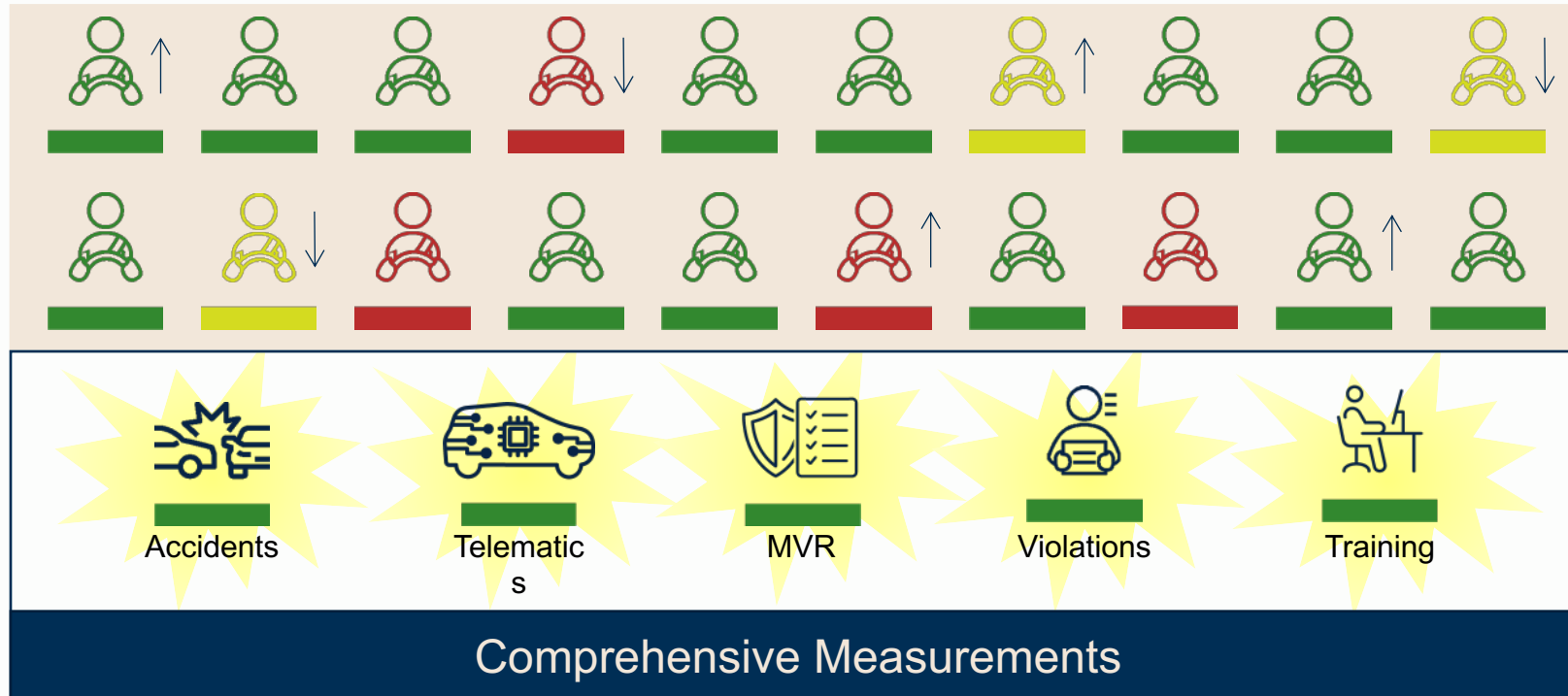
Trip Logs

- Enter/Add/Edit/Delete Trip
- Submit/Remove Log
- Log Notes/Comments

Violations

- View Violations
- Pay Violation

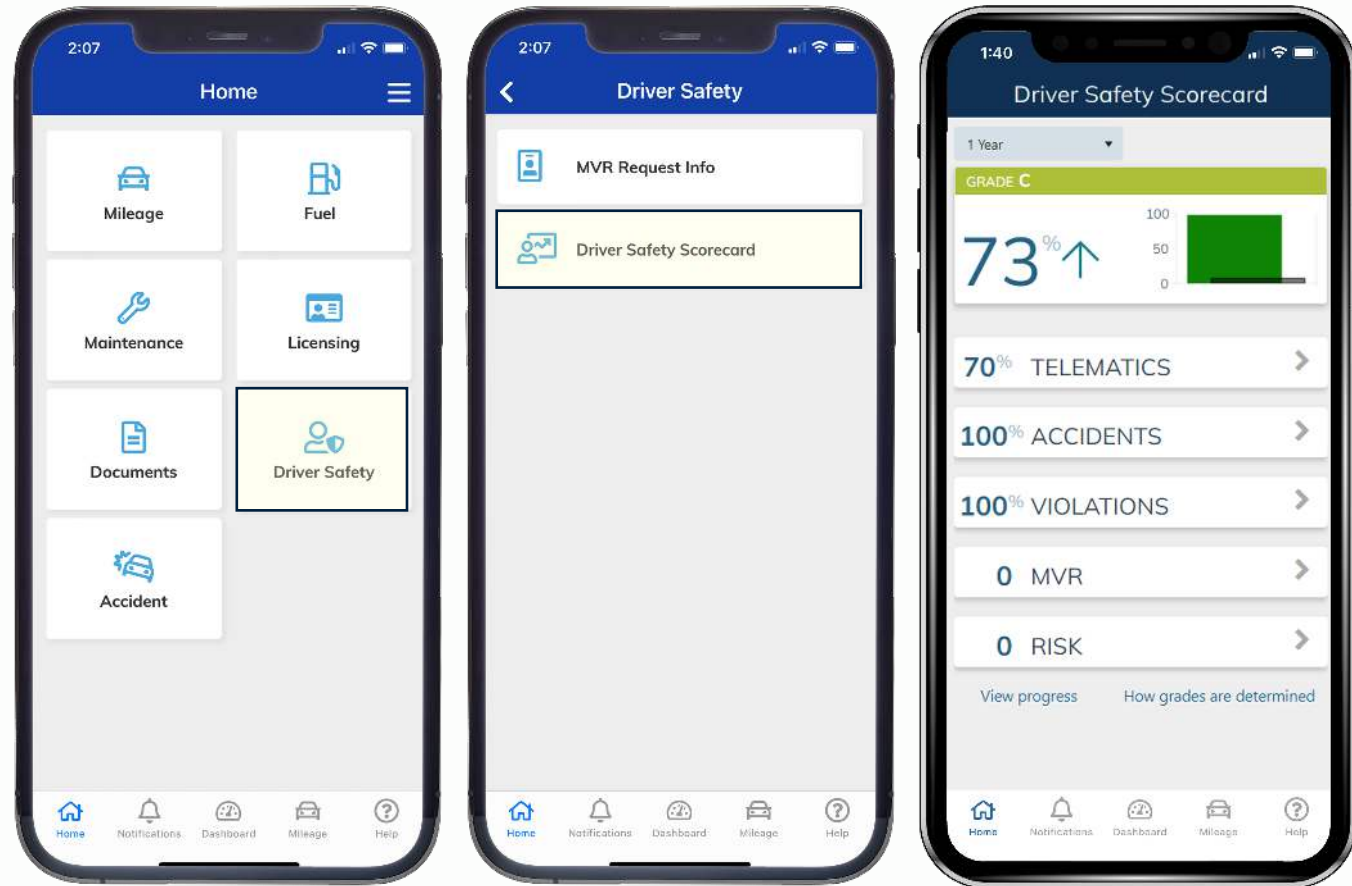
HOLMAN DRIVER SAFETY SCORECARD



Get a complete picture of driver behavior
Identify risky behavior before an incident occurs

Holman Driver Scorecard

Improve driver engagement with full Driver Safety Scorecard functionality on Holman mobile app



Smart Search

Set Home Smart Search

stallone

Common searches: [View Initial Licensing Status](#) | [Look Up Fuel PIN](#) | [View O](#)

Suggested |
 Vehicles (4) |
 Support (1)

[Add New Contact](#)
 Enter a new contact/driver for your organization.

[Get Fuel PIN](#)
 Get fuel PIN of one driver


Vehicle Image	Vehicle Model	Status	Client-Vehicle	Lic Plate	VIN	Driver
	2021 FORD EXPLORER	Active	SZA1-AAA005	-	1FMSK8DH9MGB86129	MIKE STALLONE
	2021 FORD EXPLORER	Active	SZA1-AAA004	-	1FM5K8GC7MGB66457	MIKE STALLONE
	2020 FORD EXPLORER	Active	SZA1-AAA003	-	1FM5K8GC0LGB38143	MIKE STALLONE

Set Home Smart Search

stallone

Common searches: [View Initial Licensing Status](#) | [Look Up Fuel PIN](#) | [View Order Status](#)

Suggested |
 Vehicles (4) |
 Support (1)



Active

2021 FORD EXPLORER

Client-Vehicle [SZA1 - AAA005](#)

Driver **MIKE STALLONE**

Lic Plate

VIN [1FMSK8DH9MGB86129](#)

Odometer [13,464 on 08/09/2022 \(Fuel\)](#)

Address **6 WASHINGTON AVE
HADDONFIELD NJ 08033**

Vehicle Actions

<p>Documents</p> <p>Enter Registration</p> <p>Upload Licensing Prerequisite</p> <p>Upload Vehicle Document</p>	<p>Requests</p> <p>Fuel Card Replacement</p> <p>Registration Credentials</p>	<p>Contacts</p> <p>Change Contact Association</p>
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Current Pilot

Insights Support Center

Currently in
Internal Beta
Testing Stage

Support Areas:

- Accidents
- Fleet Management
- Billing
- Vehicle Inspections
- Contacts
- Driver Safety
- Fuel
- Licensing
- Maintenance
- Mileage
- Ordering
- Remarketing
- Technical Support
- Telematics
- Violations
- Toll Management

The screenshot displays the Holman Insights Support Center interface. At the top, the navigation bar includes the Holman logo, the word 'Insights', and a user profile for 'GREG RAVEN'. Below the navigation bar, there are several utility buttons: DASHBOARDS, QUICK SEARCH, LANGUAGE, FAVORITES, SAVED SEARCHES, and SUPPORT CENTER. A search bar is also present.

The main content area is titled 'Request History' and includes a sub-header: 'You can view your requests, monitor the status and communicate with your account support team.' A 'Back' button is located on the left side.

On the left side of the interface, there is a 'Your Requests' section with a search bar and a table of request numbers. The table lists request numbers 203, 221, 527, and 528. A blue arrow points from the 'Support Areas' list to the '221' entry in the table.

The main content area shows a detailed view of a request titled 'Lookup Fuel PIN'. The status is 'Resolved (No further action required)'. The details section includes the following information:

- Category: Fuel
- Subcategory: Card Management
- Concern: Lookup Fuel PIN
- Card Type: West Millennium
- First Name: Dave
- Last Name: Smith

The 'Notification Settings' section includes options to turn on request notifications via SMS Text Messages (phone number: (856) 220-5751) and Email (email address: GREG.RAVEN@HOLMAN.COM).

Annotations with arrows point to various elements: 'Case Visibility' points to the top right of the request details; 'Smart Search' points to the search bar in the request details; and a blue arrow points from the 'Support Areas' list to the '221' request number in the 'Your Requests' table.

Support Center

How can we help you?

You can quickly find answers using the search bar below

Search the Support Center (Ex. "Replace Fuel Card")

Common searches: View Initial Licensing Status Look Up Fuel PIN View Order Status

View Request History

- Accidents**
 - View Accident Claim Documents
 - Report Accident Claim
 - View Repair Status
 - View Subrogation Status
- Contacts**
 - Add New Contact
 - Associate Contact to Asset
 - Update Contact
- Driveway**
 - Drive Away Request
- Driver Safety**
 - Manage Fatal Templates
 - Access MVR/Abstract Authorization Forms
 - View and Assign Driver Training
 - View MVR Point Structure
- Fleet Management**
 - Add Vehicles
 - Enter Cap Cost Value
 - Change Status to Sold/Out of Service
 - Activate Sold or Out of Service Vehicle
 - See more (3)
- Fuel**
 - Fix Fuel Card Error
 - Disable Fuel Transaction
 - Replace Fuel Card
 - Create New Fuel Card PIN
 - See more (1)
- Licensing**
 - Initial Licensing Request
 - View Initial Licensing Status
 - Permit Request
 - View Renewal Status
 - See more (7)
- Maintenance**
 - Add Approver
 - Remove Approver
 - Replace Approver
 - Update Approver
 - See more (6)
- Mileage**
 - Edit Driver's Mileage
 - Edit Odometer History
 - Enter Odometer or Tachometer
- Ordering**
 - Cancel Order
 - Change Order
 - View Order Status
 - Place Order
 - See more (6)
- Remarketing**
 - Access Holman Equipment Direct Site
 - Add Vehicle to an AEO Sale
 - AEO Payment Status
 - AEO Sale Status
 - See more (8)
- Technical Support**
 - Received Error Message
- Telematics**
 - Dispute Telematics Charge
 - Device Order Status
 - Install Device
 - Order Device
 - See more (1)
- Vehicle Inspections**
 - Configure Inspection Form
 - Create Vehicle Inspection Report
 - View Submitted Inspection Forms
- Violations and Tolls**
 - Payment Request
 - Order Transponder

Need further assistance?

- Learning Library**
Access the content library for self-paced help documents and guidance
- What's New**
See what's new in Holman Insights
- Show Me How**
Learn how to complete a task with step-by-step guidance
- Chat**
Start a conversation with our virtual agent
- Submit Request**
Have a question or concern? Complete the form and we'll get back to you with a response

Customer Experience Journey – Service Strategy

Holman Insights Welcome, PUATYB VHABDM

DASHBOARDS QUICK SEARCH FAVORITES SAVED SEARCHES SUPPORT CENTER

Search Vehicles Drivers Ordering Reporting Analytics Communication Telematics Insights Pages

Enter keywords

Request History

You can view your requests, monitor the status and communicate with your account support team.

[Back](#)

Quick View

Click a status button below to quickly filter submitted requests.

Recent Update **2** Submitted **1** In Progress **7** On Hold **0** Completed **0**

Your Requests

Sort and filter your requests by category. Click anywhere in the row or click the Request Number to view submission and status details.

Search your requests Filter

Request Number	Status	Program	Client Code	Vehicle	Submitted Date	Last Updated
3519	In Progress	Long/Short Term Rental			3:04:54 PM	8:35:20 AM
3534	In Progress	Maintenance Long/Short Term Rental	7R55	71937	05/04/2022 8:44:06 AM	05/04/2022 8:45:20 AM
3535	In Progress	Maintenance Long/Short Term Rental	2B67	71234	05/04/2022 8:46:31 AM	05/04/2022 8:50:20 AM
3536	In Progress	Maintenance Long/Short Term Rental	0BJ6	71937	05/04/2022 10:40:12 AM	05/04/2022 10:52:13 AM
3537	In Progress	Maintenance Long/Short Term Rental	2B67	71937	05/04/2022 11:35:22 AM	05/04/2022 11:52:38 AM

- Streamlining communication channels for visibility, reduction in touchpoints and quicker resolution
- Alerts on action needed or updates
- Increased opportunity to eliminate involvement from SLB Fleet Team on tactical items
- Shifts focus of account owners to initiatives

Fleet Manager Mobile App

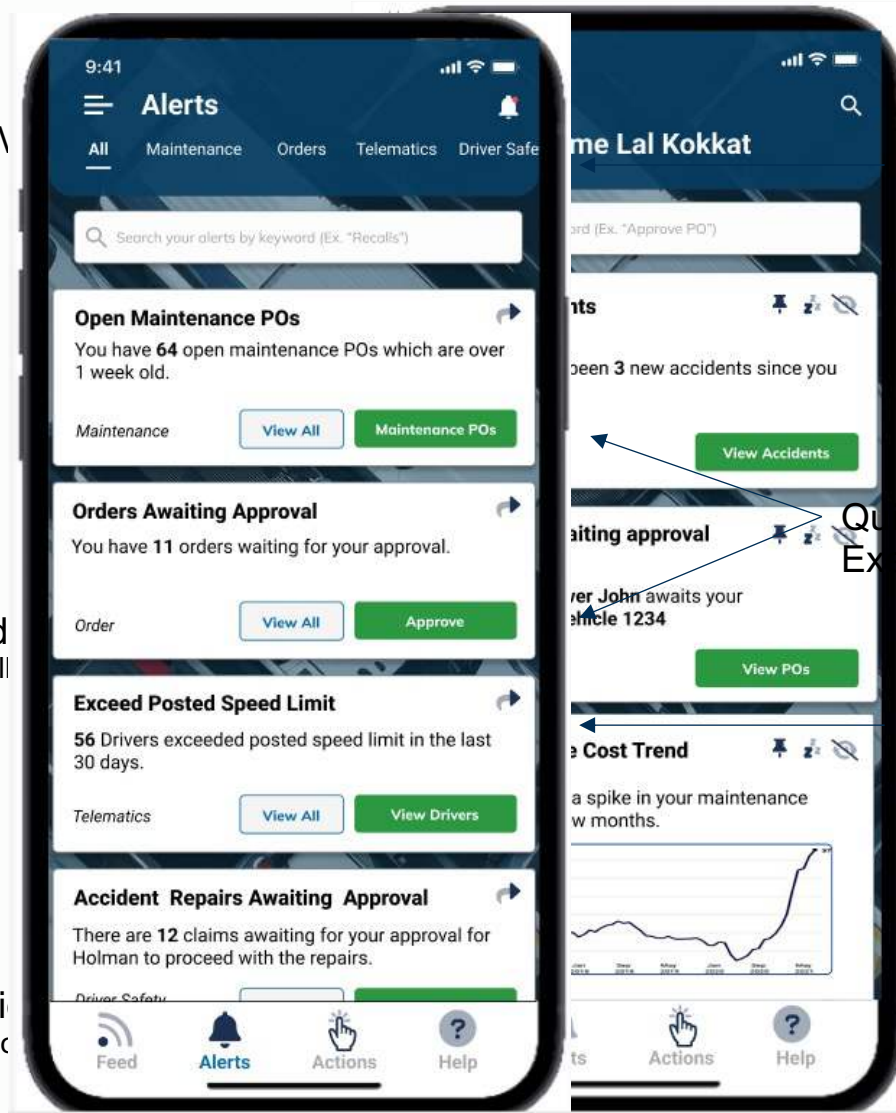
UX CONCEPT MOCK-UPS

- Development starts August 2022
- Insights User ID Parameters & Limits of Authority Mirrored to App
- Designed to Drive Action
- Easy Execution

Easy FM

Social Med
Foll

Basic Navigati
Feed, Alerts, Supp



Easy Filtering

Smart Search

Quick Link to
Execute

Alert Preview



Canada

NMSO for Fleet Management Services

E60HP-11FMSS/001/HP

2022 CPMM FLEET MANAGEMENT WORKSHOP

Holman
Driving What's Right



Questions?