



SELLING PMs: THE BOOK!





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— INTRODUCTION

**HOW MANY TIMES
HAVE YOU LOOKED
AT A BROKEN-DOWN
PIECE OF EQUIPMENT
AND THOUGHT...**

**“IF ONLY THEY’D KEPT
UP WITH THEIR
PREVENTIVE
MAINTENANCE?”**

Yes, breakdowns and freak accidents can happen. But many, many big problems a vehicle can run into started out as small issues: matters of wear-and-tear, items that could have been replaced but were instead ignored. That's how minor fixes spiral into major downtime.

That's why we keep pushing the idea that independent repair shops should supply preventive maintenance to their customers. It's one of the best things you can do for a vehicle and your shop: a win-win for you (steady work!) and for the fleet receiving it (why not get ahead of problems before they turn into downtime?).

But despite all of our glorious literature about [how great PMs are](#) and why shops should aim to [take over PM work](#) for fleets, we suddenly came to a cold realization.

We've never actually talked about how to get that work.

Let's say you want to handle the PMs for a medium-sized fleet whose trucks you see now and then. How do you approach that fleet manager

and start a conversation that ends with you taking over their preventive maintenance?

Or...let's say you're driving home from a grocery run and spot a battered-looking semi in the lot. That person needs PM work! How would you broach the subject?

To gather some ideas, we sat down with four awesome people:

- **Jacob Findlay** | co-founder and CEO of Fullbay
- **Chris O'Brien** | COO of Fullbay and former fleet manager of Shamrock
- **Troy Willich** | President/Owner of TDI
- **Brian Still** | Executive Vice President of TDI

We burrowed deep into the minds of these four gentlemen to learn more about the philosophy behind preventive maintenance, what fleets want, and ultimately how to offer that service.

You want to secure PM work?

Here's how to do it...



■ Remember the relationship.

Before embarking on this epic quest, remember one thing: you aren't just securing work for yourself or making a fleet safer. You're creating a relationship or deepening an existing one. If you follow our blog, you know we talk a lot about relationships with customers. This is particularly critical when you're asking a fleet manager or owner to hand over their maintenance duties to you.

Most private fleets operate on razor-thin margins; it only takes one breakdown or one delay to cause catastrophic damage to the business. By taking on their PM work, you're saying to them, We'll give you more uptime and fewer breakdowns. They're entrusting you with that business, and if you don't deliver, well, they're gonna go elsewhere.

Offering them more uptime is only part of the equation, Brian says. You also need to be willing to share bad news. Sometimes a repair will take longer than you think. Sometimes a part is held up. Sometimes there's more to a diagnosis or fix than you imagined. Your customer may not want to hear bad news, but they'd definitely rather know about it instead of finding out, say, while they're on the road. "If you establish that you're willing to be honest and deliver bad news, there's a level of comfort that makes people more receptive to partnering with you."

Chris puts it another way...



We both win together, or we both lose together.

CHRIS | FULLBAY COO



■ Find a fleet.

How do you track down the people that will be interested in PM work?

The really big fleets generally have their own internal shops because it's more cost-effective for them to keep everything in-house. The lone owner-operator is probably going to be tough to convince, too. "Medium-sized fleets are probably the best sell," Troy says; they likely don't have their own shops, and they'll be open to hiring an outside shop to look for problems before they occur.

Ideally, you'll find a fleet based in your city. There are three general types

out there for you to be aware of: for-hire carriers, private carriers, and service performers. The service fleets often go ignored, but they need maintenance, too; examples include tow companies, street sweepers, or tree maintenance.



Medium-sized fleets are probably the best sell.

TROY | SHOP OWNER



■ Gather your information.

Most of the time, you can't just go to a fleet and say, "Give me your PM work!" and it magically appears. (If you can...please call us.)

The way to lock down their PMs is by showing them that they'll save money and have more uptime if you take over their preventive maintenance. You do this by determining exactly what they need and what you can offer.

The most efficient way to do this is to get a list of their units on a spreadsheet, though this isn't always possible. "They may have to build it," Jacob says, "but you need an understanding of what PMs need to be done on each unit in that fleet." You also want an idea of how much they spend on maintenance for their

fleet; be forewarned, they may not have that aggregated yet. "It may be anecdotal evidence," Jacob goes on, "but try to get it if you can."

What services would you offer them? Wet and dry to start, but dig deeper.

We **encourage inspections** every time a truck arrives in the shop, but certain services might make more sense at certain times of the year. Consider HVAC inspections (especially before the summer months), brake inspections, hydraulic inspections, and so on. By putting together a potential package that addresses their specific needs, you're tailoring your service directly to them.



■ What does a fleet need?

Sorting out what services a fleet needs means thinking like a fleet manager whose primary job is to maximize uptime and safety. For this example, we'll create a private fleet that deals in food transportation.

Food is transported in reefers to ensure preservation while it travels across the country. As you can imagine, there are strict regulations in place regarding the "cold chain." If you violate it you can lose entire contracts, which are often worth millions in distribution rights. Even worse, you can get people sick.

On top of that, on-time delivery is particularly critical for trucks that contribute to the food supply. "The

customer won't give us another order if we screw up," Chris says. A breakdown doesn't just mean time spent on the road; a critical enough failure could lead to the reefer unit itself malfunctioning, and at that point, the delivery isn't just late—it's ruined. Thousands upon thousands of dollars down the drain, and possibly the end of a working relationship, too.



The customer won't give us another order if we screw up.

CHRIS | FULLBAY COO

Let's look at the partnership angle again. If you aren't keeping those reefers running properly, your customer is going to leave you. That's money out of your wallet (and possibly a bad rap amongst other fleets—yes, people talk!). It is in your best interest to minimize a fleet's downtime through proper maintenance. Remember what Chris said about winning or losing together? That absolutely applies here. If you want to succeed, you need to help your fleet succeed.

Fleets are also concerned about safety for their drivers and everyone else on the road. "The safer we are, the better everyone is," Chris says, adding that most warranty coverage is only valid if you maintain your vehicle and can prove you maintained your vehicle. That means a paper trail of some sort. If you have a premature clutch failure and you have no documentation from a shop, the manufacturer is not going to cover it under warranty. That's an expensive loss.

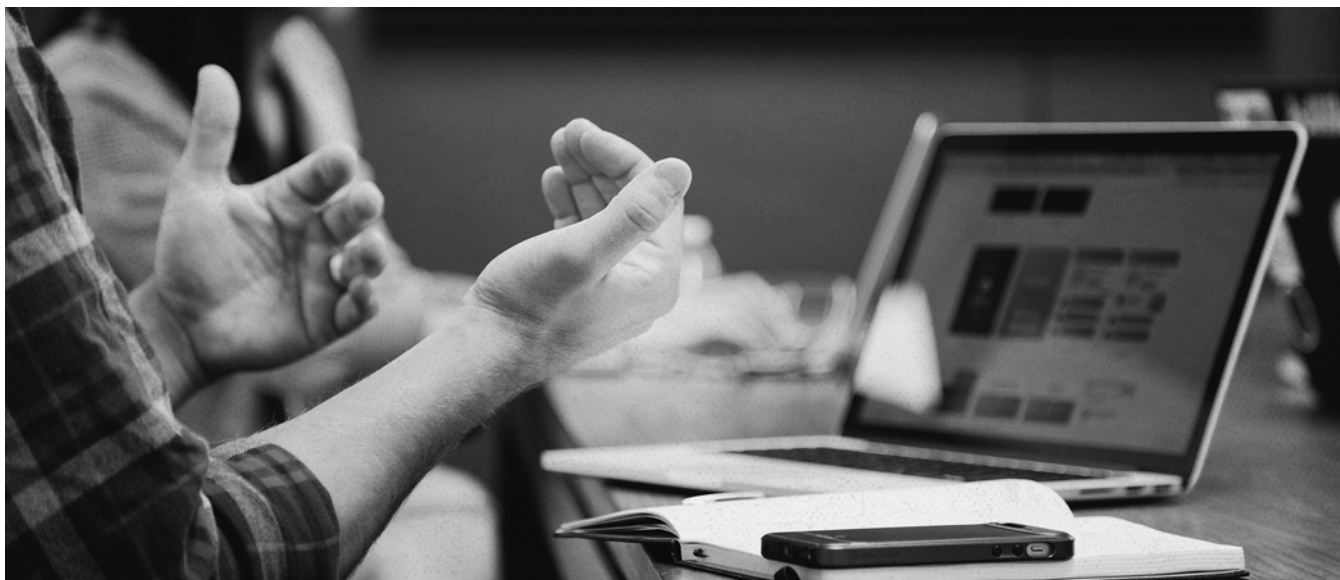
Now that you've got a good awareness of what a fleet is looking for, let's figure out who you should have the conversation with.

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WHO SHOULD YOU TALK TO?

Usually, you'll be looking for a fleet manager or ops manager, but we do recommend running it up the chain until you reach someone who can squash the whole enterprise. If you start negotiating with a fleet manager, that fleet manager is going to need to run everything by someone, and as Brian notes, "Something always gets lost in translation."

Make sure you have the ultimate decision-maker in the room or at least listening in on the call. If you can get buy-in from them, your job will be that much easier.



■ Make your case

All right. You've got your information and you're ready to begin the conversation.

You may be selling them something, but don't look like you're trying to sell them something. You need, Brian says, to have "honest dialogue without a pitchy approach."

We've covered two ways you might approach the subject.

APPROACH 1: YOUR CUSTOMER GIVES YOU AN OPENING

Sometimes, Troy remarks, your customer will give you an opening without realizing it. "Man," a fleet manager says to you after you

replace the third popped tire in as many weeks, "you shops are just robbing me blind this month."

"You have had a lot of tire problems lately," you might say. "What's going on with that?"

Start sussing out their situation. Ask questions like:

- **How long has this been a problem?**
- **How much have you spent on emergency maintenance this year (or month)?**
- **When did these problems start?**

Your job here is to ask questions, listen to their answers, and sort out what's really going on with their vehicles. If one truck of

theirs has broken down five times this month, that's a huge red flag. Someone isn't taking proper care of it. "You know," you might say, "we could check those tires for you once a month and make sure they aren't on the verge of going bad."

Just like that, you've offered them a solution. If they're interested, or want to learn more, set up a time to talk to them privately without the hustle and bustle of the shop all around.

APPROACH 2: COLD CALLING

Cold-calling is a little harder, depending on your personality, but you can do it.

Brian shared his own method with us: Be apologetic. If he sees a truck that needs work, he'll often call up the fleet manager and approach with his cap in his hand. "I want to apologize if you guys are here and we haven't reached out to you about preventive maintenance," he says. He then shares that his shop is in the area and while this truck might have X, Y, and Z wrong with it, regular PM work can absolutely take care of those problems.

By approaching a potential customer in an apologetic way, you're avoiding the pitchiness that can put people on the defensive, and instead admitting that you dropped the ball.



You need to have honest dialogue without a pitchy approach

BRIAN | SHOP OWNER

By approaching a potential customer in an apologetic way, you're avoiding the pitchiness that can put people on the defensive.



■ Always be upfront.

Honest, upfront dialogue with zero fluff and zero BS is the key ingredient to making your case. It's part of our job to remind you that "zero BS" can mean delivering bad news. "We're professionals at that," Brian says. "It's not so much the news, but the willingness to communicate what we recognize is important."

The following talking points will help you pick up the fleets you want to work with, but always fall back on the partnership angle. You don't need to make a giant presentation—and often, that's not what a customer wants, anyway. Have your talking points, and maybe a couple of visual aids, but remember that this is a conversation, not a conference.



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BRIAN | SHOP OWNER

Sometime else to think about: Your potential customers are often not going to be in a great mood when you talk to them, particularly if you're approaching them after a series of misfortunes. Listen to their pain points. Really grasp what's bothering them and keep them apprised of how your shop can help.



REMINDE THEM OF THE CYCLE OF MAINTENANCE

Your potential customer, whoever they are, is not going to escape the cycle of maintenance. Thousands of years ago, the first wheel broke and caused problems. We've built much better equipment since that wheel, but no matter what kind of vehicle you have, maintenance and repairs are inescapable.

When you make your case, remind your customer that the best way to combat the issues inherent in the system is to be preventive. You're here to eliminate the issues that can be eliminated, which makes a huge difference in uptime.



REMINDE THEM OF THE PERKS OF ONE SHOP

The biggest perk of having one shop handle all your stuff? They get to know your equipment and you. The closer you work with someone, the better the service. Compare it to going to the doctor. If you've been going to your physician for years and years, they know all your little quirks: that pizza with pepperoni gives you heartburn, but pizza with sausage does not. They know that your right

knee bothers you when it rains and that you drink a little too much coffee.

When you know a customer's equipment and know who you're dealing with, Brian says, "there's a level of comfort that makes people more receptive to partnering with you."

It's also easier to address warranty issues if everything is underneath one shop.

3

PRESENT YOUR SERVICES

If you pick up the preventive maintenance for a fleet, what can you promise a manager? Here's a list:

- **By getting ahead of potential issues, you'll have more uptime and be operating safer equipment.**
- **Here's what you'll get—detail the package you're offering.**
- **You, as a partner, will always be honest.**



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CHEAP IS NOT THE ANSWER

All four of our interviewees felt that trumpeting “We’re the cheapest” as your main selling point was a red flag. “It’s about service, quality, reputation, and backing,” Chris says. All of these things require time and money. Roll them into your labor rate; if a potential customer balks, remind them of everything they’ll be receiving when they work with you.

But don’t start lowering your rate just because someone winces. Providing high-quality work requires high-quality people and tools, and those things aren’t free or cheap. Don’t be afraid to remind potential customers of that next time one of them winces.



It's about service, quality, reputation, and backing.

CHRIS | FULLBAY COO

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DON'T BE PITCHY.

We keep saying it. This is a partnership, not a sales pitch. If you take on PM work for a fleet, you are going to be working very closely with them over the next months and hopefully years. When we're being sold something, our defenses go up. No one goes to the mall and thinks, "I'm gonna let someone sell me shoes today!" Instead, they think, "I'm gonna buy new shoes today!"

By educating your potential customer but ultimately leaving the power of the transaction in their hands, you're making them a partner in the negotiation and opening the door to a good future relationship.

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■ How can Fullbay help?

If you've made it this far, we offer you the highest of fives. Securing PM work is a critical step for so many shops, but it takes time to learn how to get started.

It's no secret that Fullbay is a shop's secret weapon when it comes to preventive maintenance. Tracking preventive maintenance is easy when you have an app that tells you when a vehicle needs to come in for this service or that one, right? Additionally, the fleets you tend will want that paper trail that they can provide if warranty or DOT issues come up. If they can prove your shop has been tending them properly—and Fullbay will maintain your records so you can do just that—they can avoid a lot of headaches. Some shops mention us in their pitches to potential customers; we've even created a community where you and other shop owners can pool resources to help you pitch fleets.

Brian compares a shop using Fullbay to Batman...



Of all the superheroes, Batman was just a guy. What made Batman special was that he had all these really cool gadgets. His tools let him battle bad guys and solve problems ... Fullbay is our gadget.

BRIAN | SHOP OWNER

Fullbay was built with preventive maintenance in mind. A safer vehicle contributes to greater overall safety on the road, and ultimately, that's what we're all working toward. If you're ready to become Batman—er, or take your PM work to the next level, [give us a try](#). We'd love to help you make the roads a safer place.



– WHAT'S GOING ON IN YOUR SHOP?

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