

**Alerts** are an incredibly powerful fleet management tool **\*IF\*** they are implemented properly. If you get too many, you're likely to ignore them. If you don't get enough, you're likely to miss important events. And of course, all of this is assuming that you've *accurately identified the policies* that these alerts are meant to help enforce in the first place. This article helps you strategize alerts so that they remain manageable and effective.

## 1. Examine Existing Policy

In order to determine which alerts to schedule and the settings to use, start by listing policies (e.g., late arrival and/or early departure times, unnecessary engine idle times over "x" minutes, use of vehicle or trailer after work hours, speeding over "xx" mph of posted limit or other threshold, other potential misuses of company time and/or property).

Once you've listed all of your policies, determine which ones require immediate notification. Not all policies translate into alerts—in fact, many violations can be consolidated and delivered with scheduled reports, which allow you to focus more on trends as opposed to individual violations. Alerts are typically used for the most outstanding or potentially dangerous violations (e.g., very high speeding) that should be addressed immediately (e.g., individual driver coaching).

## 2. Document the Alert Settings

Once you've identified which policies require an alert, create a matrix to capture more details, such as who needs to know when violations are taking place, on what specific vehicle groups, and at what frequency. The threshold is largely dictated by policy and will determine how aggressive your approach is (e.g., how often you will be alerted).

### Sample Alert Matrix

Alert	Recipient(s)	Vehicle/Group/Hierarchy	Threshold(s)
Stop/Idle	Southwest Fleet Manager and Driver	Southwest	Idle stop > 8 min
Service Reminders	Driver only	All Vehicles	500 miles, 40 hours, 7 days within service
More...			

## 3. Prioritize and Roll Out in Phases

After you complete an alert configuration matrix, you'll be able to characterize your approach (moderate, medium, or aggressive).

- Moderate – No alerts set or highly egregious
- Medium – Alerts set at high thresholds (e.g., 30+ min idle, 20+ miles posted speed)
- Aggressive – Alerts set at low thresholds (e.g., 5+ min idle, 10+ miles posted speed)

If your approach is already moderate, you may not need to consider a phased roll-out. However, if your approach is medium to aggressive, you may find *tremendous* benefits to rolling out alerts according to a phased schedule.

Phase	Plan	Example
Q1	Set alerts to monitor <b>device health</b> (Pro/En).	External Power Loss\Tampering (Standard), Battery Voltage (Pro/En)
Q2	Set alerts for egregious violations sent to managers only.	Posted Speed 20+ MPH, Idle 30+, Other
Q3	Set alerts for moderate violations sent to other recipients not directly related to fleet.	Landmark Alerts, Maintenance, Odd Hours, Other)
Q4	Set alerts on egregious groups to be delivered to managers, and notify drivers via email <b>or SMS</b> .	-

## 4. Evaluate Effectiveness

What's working? What's not? If you feel overburdened or annoyed by alerts, it's a sign that something needs adjustment:

- Adjust existing thresholds
- Coach repeat offenders and create special alert groups for those drivers.
- Identify additional areas that require alerts
- Identify alerts that can be inactivated and addressed with scheduled reports instead.

Make alerts work *for* you, not the other way around.

### More reference materials:

- Getting too many alerts? Check out [Editing an Alert](#).