

motive

Trialing a fleet management and safety platform: A buyer's guide.





Introduction

Managing a fleet today is harder than ever. Drivers face dangerous road conditions, managers struggle to get things done, and profits are harder to come by. Without real-time visibility into fleet operations, managing effectively and protecting your bottom line is nearly impossible.

The right [fleet management solution](#) — one with advanced AI, safety features, and spend management tools — can make running your business easier.

Choosing the right solution is crucial. A structured trial helps ensure that your technology investment meets your needs and delivers immediate value. This guide walks you through the vendor trial process — from planning and installation to data collection and value analysis — so you can make an informed decision.

The five key steps for trialing vendors:

- **Prepare for trial:** Define goals, align team expectations, and plan installations for a seamless experience.
- **Prepare for go-live:** Set up systems, customize the trial experience, and send final reminders.
- **Execute the trial:** Regularly engage with the [Motive Dashboard](#), familiarize yourself with the technology, and monitor trial data for insights.
- **Review mid-trial performance:** Assess results to validate the trial's impact, refine success criteria, and make necessary adjustments.
- **Wrap up the trial:** Review final results, confirm business fit, and develop a comprehensive full-scale rollout and change management plan.

Prepare for trial

[A well-planned trial](#) provides meaningful insights and supports long-term success. In this phase, define the trial's scope, set clear success criteria, engage your team, and plan installations. Early alignment of stakeholders and setting measurable goals helps you accurately assess each solution's value to your business.

Plan the trial

Locations

- Select at **least two locations** to assess performance in different environments. Having multiple locations also promotes friendly competition to drive performance.
- For [AI Dashcam Plus](#) trials, prioritize higher incident locations to better assess risk reduction.

Vehicle count

Include a representative vehicle sample for reliable data. Adjust vehicle numbers based on fleet size:

Fleet size	Recommended vehicle count
Over 1,000 vehicles	10-20 vehicles
Between 100 to 1,000 vehicles	5-10 vehicles
Less than 100 vehicles	3-5 vehicles

Hardware scope



Fully evaluate the vendor's capabilities and long-term partnership potential by testing the complete hardware suite, even if your initial deployment will be limited. Here are some suggestions:

- **Test Motive's full offering.** Include the [AI Dashcam Plus](#), [AI Omnicam](#), [Vehicle Gateway](#), [Asset Gateway](#), [Environmental Sensor](#), and [Motive Card](#) to provide a comprehensive view of the platform for current and future needs.

- **Add dual-facing cameras.** If only testing the Road-Facing AI Dashcam Plus, add a few dual-facing cameras with Driver Privacy Mode and lens covers to easily assess driver-facing features later in the trial.
- **Test cameras side by side.** If trialing multiple dash cam vendors, use the [How to run a dash cam trial guide](#), which includes benchmarking best practices and scorecards to effectively compare results.

Existing hardware

- Identify and assess the telematics, GPS, or dash cams currently in use.
- Decide if existing hardware will be removed or integrated with the new solution. If integrating, consult with Motive to optimize configurations.

Trial duration

- **30-60 days** provides enough time for comprehensive data collection and review.
- **Two weeks** is the minimum for a quick assessment if units are installed immediately.
- Align the trial with your business timeline, take into account:
 - Vehicle availability
 - Access to drivers for training
 - Existing contract end dates
 - Peak seasons (e.g., holiday delivery rush)
 - Fiscal year cycles
 - Anticipated rollout plans
 - Holidays

Coordinate installations

Installation schedule

Schedule installations when on-site support is available to speed up the process and minimize disruptions.

Installer training

- Make sure installations are done correctly and on time. We recommend using Motive's installation services, especially for hardware installed on personal vehicles.
- If using internal or third-party installers, they can be trained with Motive's resources. Motive can also set up a prep call with the installers to confirm they've been trained on all hardware installs, including:
 - [AI Dashcam Plus](#)
 - [AI Omnicam](#)
 - [Asset Gateway Mini](#)

Communicate with drivers and managers



Driver communication

- Prepare drivers by helping them understand their role in the trial, how to interact with the hardware, how to log in if needed, and the in-cab alerts they may receive.
- If the trial involves the Motive Driver App ([iOS](#) and [Android](#)), ensure drivers download it in advance. The app supports drivers with features such as reviewing safety events and [Safety Scores](#), completing [Driver Vehicle Inspection Reports](#) (DVIR), and maintaining ELD compliance.
- **Resources:**
 - [Driver Memo with FAQ](#): Share a memo covering frequently asked questions, using our recommended topics and templates.
 - [AI Dashcam Plus Visual Indicators](#): Provide a quick reference card to help drivers understand the meanings of the different LED lights.
 - [Coaching Workflow](#): Share a diagram showing how self-coaching and manager-led coaching improve safety and reward drivers. This is one example of a coaching approach — connect with the Motive team to explore the best fit for your fleet.
- **Driver meeting:** Have a 30-minute meeting with the drivers to help understand the technology, how it works, and what's expected during the trial.

Manager communication	• Prepare managers by clearly outlining their roles in the trial, including how to use the Motive Dashboard and Fleet App (iOS and Android) and effectively support drivers. • Share a clear timeline for when coaching will begin, specifying whether feedback will be provided via the Driver App for self-coaching or through in-person sessions. • Communicate any grace periods to allow drivers time to get comfortable with the system.
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Collect data for installation

 Vehicles Collect vehicle numbers and VINs to ensure accurate tracking.	 Drivers Gather driver details (name, email) to set them up in the system.	 Fleet users Record user credentials to manage access and permissions.	 Installers Track installer details for accountability and troubleshooting.
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Set objectives and success criteria

NDA completion	Ensure all required non-disclosure agreements are signed to protect sensitive information and maintain confidentiality.
Business value case	• Partner with Motive’s Business Value Services (BVS) team to define objectives and desired outcomes, focusing on team challenges and potential improvements. • Examples of desired outcomes: • Reducing accidents and getting your team home safely every day. • Improving manager efficiency. • Increasing the productivity, utilization, and maintenance of vehicles and assets. • Building a long-term partnership focused on success, innovation, and safety.



Success criteria and metrics: Set measurable metrics to confirm that the solution meets your business goals. Key success criteria may include:

Desired outcome	Key metrics
Improve safety	• Reduction in unsafe behaviors and accidents • Safety Score improvement • Time to detect unsafe behaviors • False positive rate
Increase productivity	• Reduction in violations • Reduction in time spent managing safety and compliance • Improved driver experience • Reduction in idle time • Higher asset utilization
Drive profitability	• Total cost of ownership with an integrated platform • Idle reduction: fuel optimization • Fuel fraud savings (If trialing Motive Card) • Asset optimization (If trialing Asset Gateways)
Exceptional partnership	• Training and best practice guidance • Roadmap and innovation alignment • Customer support satisfaction • Platform uptime • Average response time for support

Document the trial results using the scorecard template provided at the end of the guide.

Prepare for go-live

As the trial go-live approaches, ensuring all systems, roles, and communications are fully set up is crucial for a smooth launch. Proper preparation minimizes disruptions, ensures accurate data collection from day one, and maximizes the trial's effectiveness, allowing your team to experience the full benefits of the solution.

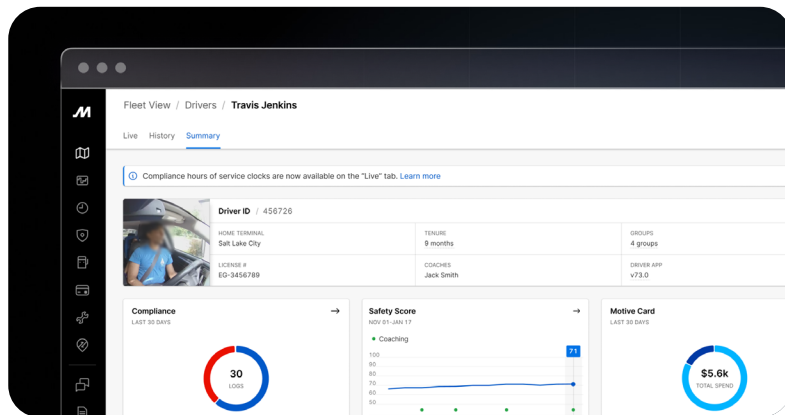
Set up user accounts and vehicle/asset profiles

Profile Setup

Ensure all drivers, vehicles, and asset profiles are uploaded and assigned in the system for accurate tracking.

Add key users

Include safety managers, dispatchers, and other relevant users to test platform features and ensure readiness.



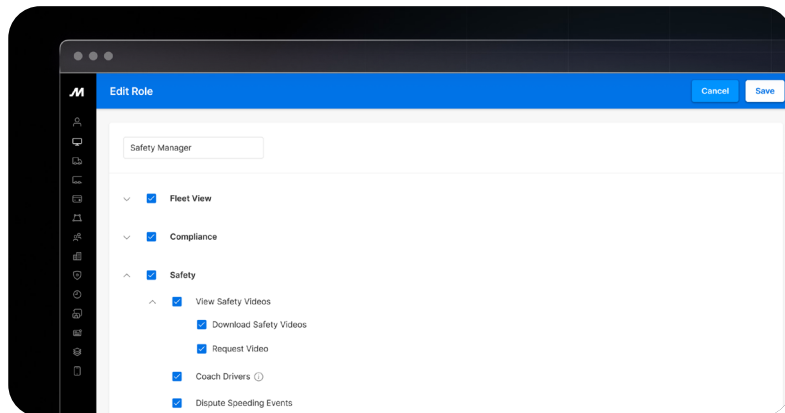
Set user groups and permissions

Hierarchy and groups

Organize trial locations into groups to efficiently manage drivers and vehicles.

Roles and permissions

Assign permissions based on each user's need for data access, features, and driver groups.



Customize the trial experience

Company settings

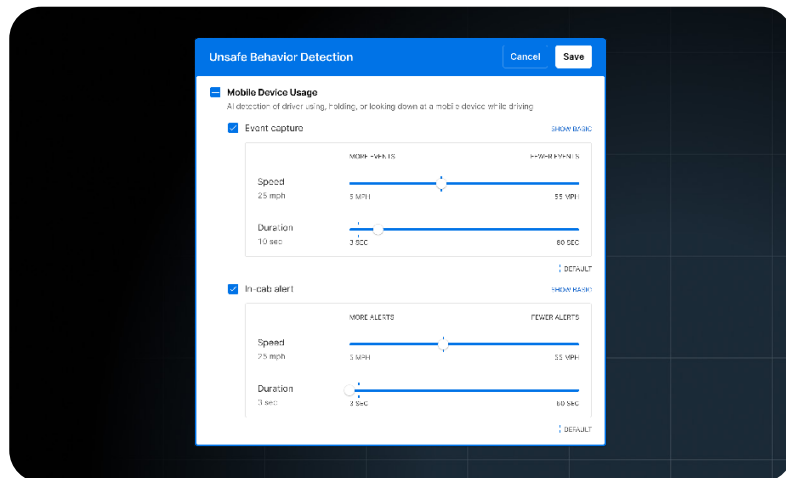
Align settings with your trial objectives. For AI Dashcam Plus trials, this may include enabling:

- Unsafe behavior detection
- Live streaming
- Driver Privacy Mode

In-cab alerts and event capture customization

For AI Dashcam Plus trials, [customize](#) when in-cab alerts trigger and safety events get captured. Motive's default settings are ideal for fleet-wide adoption, but starting with the most sensitive settings can provide a thorough baseline. Adjust as you get more comfortable with the system, using a crawl-walk-run approach to gradually introduce drivers to the camera and track the impact of alerts on behavior.

- First two weeks: Capture safety events to establish a baseline, and keep in-cab alerts off.
- Second two weeks: Activate in-cab alerts, allowing drivers to self-coach.



Safety Score customization

While the Motive Safety Score is fully customizable, we recommend starting with default settings to establish a baseline, and fine-tune as needed. Work with the Motive team to make adjustments as needed during the trial.

Email alerts

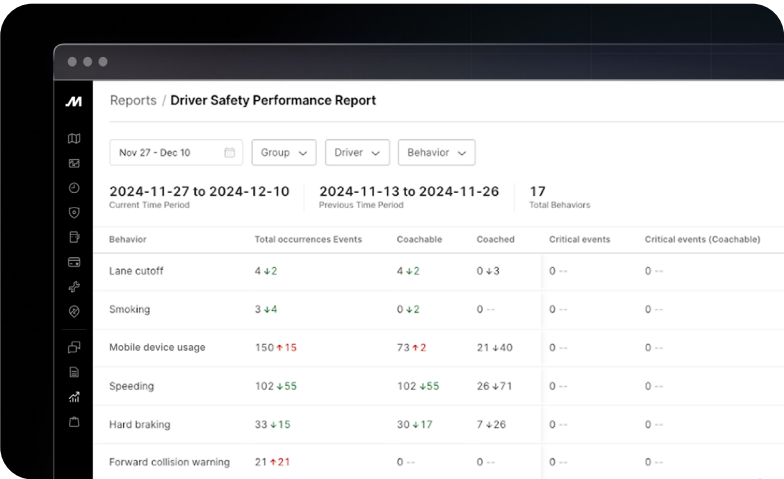
Configure email alerts for key events such as:

- Vehicle Gateway disconnect
- Camera disconnect
- Collision, near collision, or specific safety events

Essential reports

Schedule key reports to track progress, including:

- [Dashcam Connection History](#)
- [Driver Safety Performance Report](#)
- [Dormancy Report](#)



The screenshot shows a web application interface for a 'Driver Safety Performance Report'. It includes a sidebar with navigation icons, a top header with filters for date range, group, driver, and behavior, and a main table displaying performance metrics. The table compares data for two periods: '2024-11-27 to 2024-12-10' (Current Time Period) and '2024-11-13 to 2024-11-26' (Previous Time Period). The metrics include Total occurrences, Events, Coachable, Coached, Critical events, and Critical events (Coachable).

Reports / Driver Safety Performance Report					
Nov 27 - Dec 10		Group	Driver	Behavior	
2024-11-27 to 2024-12-10		2024-11-13 to 2024-11-26		17	
Current Time Period		Previous Time Period		Total Behaviors	
Behavior	Total occurrences	Events	Coachable	Coached	Critical events
Lane cutoff	4	2	4	2	0
Smoking	3	4	0	2	0
Mobile device usage	150	15	73	2	21
Speeding	102	55	102	55	26
Hard braking	33	15	30	17	7
Forward collision warning	21	21	0	0	0

Beta programs

Motive innovates at a rapid pace and always has beta programs running. Ask your account team about available betas to access early features that could enhance your trial experience.

Integrations

Partner with your dedicated account team to confirm the availability of required [integrations](#). For custom or new solutions, our Professional Services team will work with you to meet your needs.

Send final reminders

Installers

Ensure that installers are ready and aware of their schedules to avoid any delays.

Drivers

Remind drivers of what to expect during the trial, including the alerts they might receive and the data they can view in the Driver App.

Managers

Ensure managers have access to driver performance data and are prepared to provide timely feedback.

Install hardware

Before beginning any installations, make sure you consult with your account team for guidance.

Vehicle availability

Confirm that vehicles are ready for installation to avoid trial delays.

Hardware readiness

Verify that all hardware is delivered and ready for installation.

Executive sponsor presence

Have an executive sponsor on-site to oversee and support the installation, reinforcing the trial's importance.



Execute the trial

As the trial runs, monitor progress, gather insights, and assess performance to make informed decisions for a full rollout. It's also a good time to start fostering a culture of safety. Recognize and reward drivers who show safe driving habits, such as reducing safety events during the trial. Consider running contests or fun challenges to encourage better habits and boost engagement. Positive reinforcement helps drive long-term behavioral change.

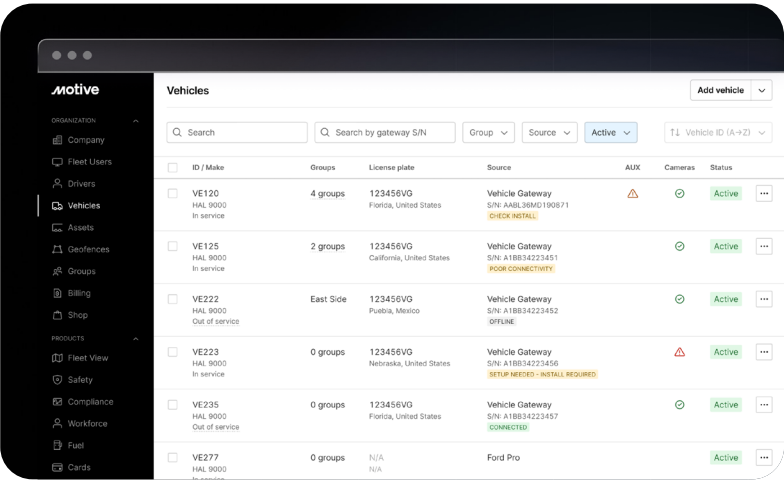
Monitor installations

Motive dashboards

- Use Motive's dashboards to ensure all hardware is correctly installed and functioning:
 - Asset Gateways - [Assets Dashboard](#)
 - Cameras - [Cameras Dashboard](#)

Real-time alerts

Set up device health alerts to notify managers if any device stops working. This proactive monitoring helps address issues quickly, keeping your trial on track.



Assign drivers to trips

To ensure accurate data tracking and compliance, Motive offers several options for driver identification, saving time on manual trip assignments and allowing accurate attribution of events for coaching.

Driver App (Bluetooth)

Ideal for fleets where drivers actively use the Driver App, required for ELD drivers. Drivers can connect to their vehicle at the start of the day and automatically log trips. Bluetooth connection ensures continuous recording of driving events, even in low-signal areas.

Static Pairing

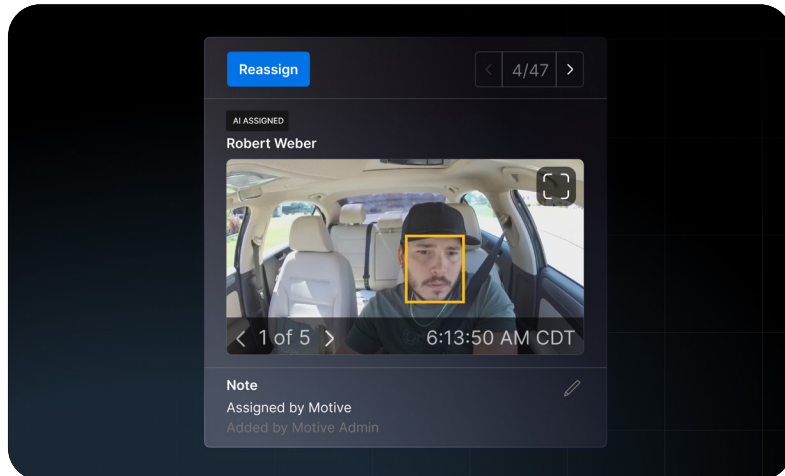
Recommended for exempt drivers who always use the same vehicle. Each recorded trip is automatically linked to a driver profile upon installation.

Face Match

For fleets trialing a dual-facing AI Dashcam Plus, we **strongly recommend** enabling Face Match to automatically identify drivers through facial recognition AI, ensuring you always know who's operating the vehicle. This feature is ideal for exempt fleets with multiple drivers per vehicle and can also support ELD fleets by minimizing manual trip assignments.

Face Match offers high accuracy, recognizing drivers even with beards, glasses, or in low-light conditions.

- **Note State-by-State and Biometric laws:** *Ensure necessary driver consents are obtained to comply with privacy regulations. States with specific privacy laws, such as Illinois (under the Biometric Information Privacy Act, BIPA), follow all consent and data handling requirements to protect driver privacy and reduce potential legal risks. Here's a sample biometric data [consent form](#) you can share with drivers.*



Assess data insights

- We recommend starting the trial with a two-week period with in-cab alerts turned off. This baseline phase captures natural driving behaviors and establishes your fleet's risk profile, providing a true picture of driver performance without intervention.
- **Suggested timeline for in-cab alerts and coaching:**
 - **First two weeks:** Baseline period with in-cab alerts off to capture initial safety events and assess natural driving behaviors.
 - **Second two weeks:** Activate in-cab audio alerts, allowing drivers to self-correct in real-time. This often leads to a significant reduction in safety events.
 - **Mid-trial review:** Compare baseline data with post-alert data trends to track progress.
 - **Final four weeks:** Begin targeted coaching through Coaching Sessions or the Driver App, reinforcing areas for improvement.
 - **Final trial review:** Evaluate overall impact of in-cab alerts and coaching on improving driver behavior.
- Throughout the trial, analyze safety events and telematics data weekly, using driver Safety Scores to track behavioral trends. For

fleets trialing AI Omnicams, recall footage for additional insights, such as verifying safety protocols and personal protective equipment (PPE) use.

- This phased approach highlights the value of the technology and shows measurable safety improvements.

Collaborate on weekly check-in calls

- Keep your trial on track with weekly check-in calls with the Motive team. This is a good time to address any questions or concerns. During these calls, you can:
 - Review key videos, trends, and insights
 - Evaluate success criteria and project timeline milestones to ensure the trial is meeting objectives
 - Adjust trial parameters as needed based on early findings
 - Involve relevant stakeholders to keep them engaged throughout the trial

Recognize and reward drivers

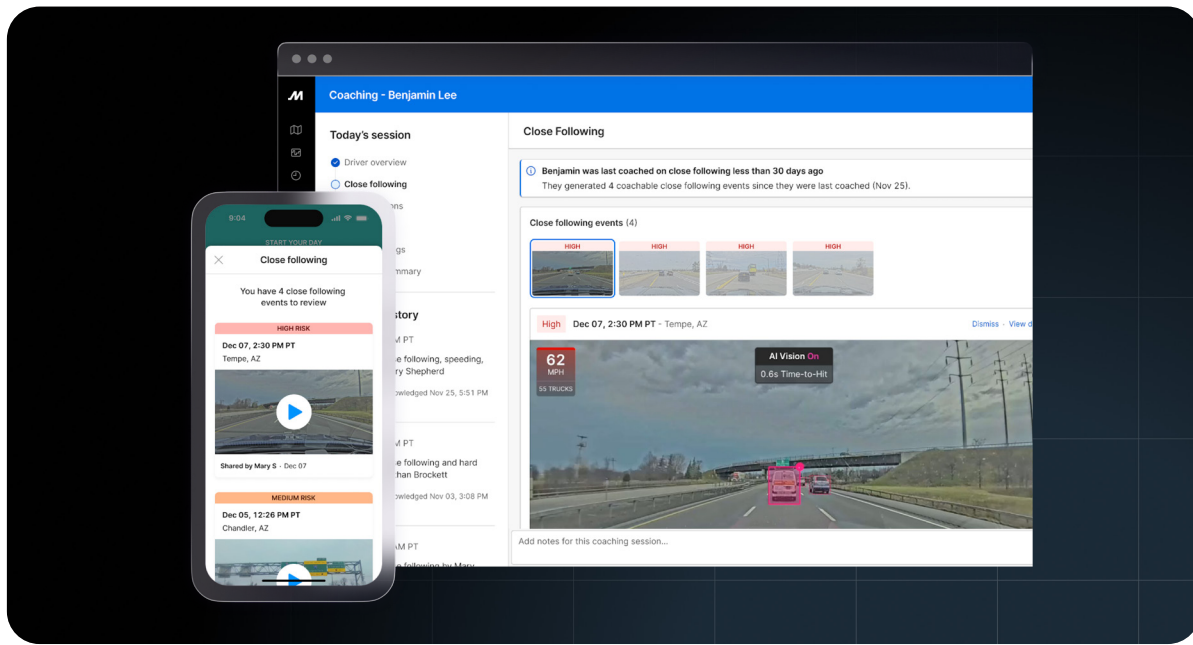
Rewarding safe driving habits during the trial is an effective way to boost engagement and encourage positive behavior changes. Use challenges and awards to motivate both drivers and coaches, tailoring recognition to align with your company's goals and the trial's objectives.

Driver recognition ideas

- **Excellence award:** Recognize drivers who complete a set number of days or miles without a coachable event.
 - Use the [Driver Safety Score Report](#) to assess performance
- **“Quick reaction” award:** Celebrate drivers who demonstrate exceptional situational awareness to avoid unsafe situations.
- **“Challenge of the week” award:** Run a focused campaign around specific goals, such as zero mobile device usage, completing all coachable events, or submitting accurate DVIRs.
- **“Most improved” award:** Highlight drivers who show the largest reduction in safety events or HOS violations over the trial period.
- **Live leaderboard:** Track Safety Score performance in a live leaderboard, sending regular email updates on rankings. Reward the top-scoring driver at the end of the trial.

Ways to recognize coaches

- **“Engaged coach” award:** Reward coaches who consistently provide timely feedback and meet goals, such as average days to complete coaching or the number of events coached.
- **“Coaching impact” award:** Recognize coaches whose drivers show the largest safety improvements during the trial.



Review mid-trial performance

Conducting a mid-trial executive review is essential to assess progress and ensure alignment with your business goals. This review allows you to validate the trial's impact, refine success criteria, and make adjustments to maximize value. Key areas to cover in this review include:

Review business case(s) and value alignment

Confirm that the trial is delivering anticipated benefits, meeting the success criteria, and aligning with long-term objectives.

Evaluate key success areas

These areas can include:

- **Improve safety:** Decrease in unsafe behaviors and accidents, Safety Score improvement.
- **Increase productivity:** Less time managing safety and compliance, reduced idle time, improved asset utilization.
- **Drive profitability:** Lower total cost of ownership with an integrated platform, optimized fuel usage, reduced fuel fraud.
- **Exceptional partnership:** Access to training and best practices, alignment with product roadmap and innovation, high customer support satisfaction.

Evaluate partnership and support quality

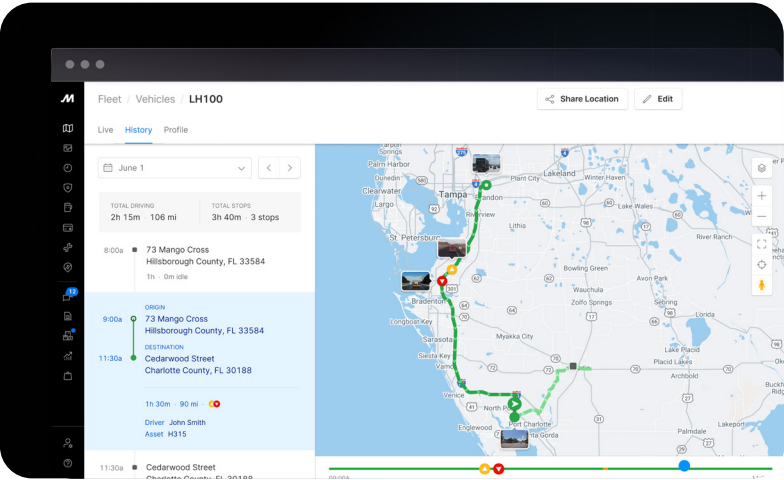
Assess your vendor's responsiveness, openness to feedback, and overall support. Consider if this partnership feels collaborative and adaptable to your needs.

Consider additional trial enhancements

- Review reports and KPIs to explore options for rewarding drivers.
- If not already in use, consider enabling the Driver App for self-coaching.

Gather user feedback

Distribute surveys to drivers and back-office staff to capture candid insights on the experience. Use feedback to identify any adjustments needed for the remainder of the trial.



After reviewing these areas, decide on next steps for the trial, including any fine-tuning necessary to meet your goals and maximize the long-term value of a partnership with Motive.

Wrap up the trial

Review trial results with executives

Conduct a thorough executive-level trial wrap-up with Motive to evaluate the trial’s success and determine Motive’s fit as a long-term partner for your organization. During this session, we recommend you:

Evaluate quantitative data

Review week-over-week trends to assess measurable impact on key metrics.

Review qualitative feedback

Gather insights from employees on their experience with the system to understand usability and overall satisfaction.

This structured wrap-up provides a clear picture of the solution’s effectiveness and alignment with your organization’s goals.



Plan full-scale rollout

Collaborate with Motive’s Professional Services team to ensure a smooth, phased deployment across your fleet. Building on trial insights, a well-coordinated rollout plan will maximize impact and efficiency.

Scheduling	Prioritize rollout in high-risk locations and vehicles first, expanding in phases to minimize disruptions and incorporate early feedback.
Data preparation	Collect necessary VINs, driver profiles, and fleet details to streamline setup and installation.
Installation coordination	Schedule installations during non-peak hours. Utilize Motive’s installers or trained third-party teams for consistent setup.
Training & onboarding	Extend trial training to additional staff, covering Motive’s features, alerts, and safety scoring to ensure uniform practices.
Communication plan	Keep teams informed on rollout progress with regular updates on new locations, milestones, and benefits.

Apply trial learnings

Use trial data to customize alerts, refine reporting, and set success metrics aligned with your safety goals.

Post-rollout monitoring

Set up ongoing support with Motive to track KPIs, device connectivity, and driver safety scores, ensuring continuous improvement.

With Motive's support and data-driven insights, you'll achieve a scalable, efficient rollout that promotes lasting safety and operational gains across your fleet.

Change management



To ensure a smooth transition, long-term success, and a strong safety culture, Motive will partner with you to implement a clear and effective change management plan, including:

- **Set clear goals:** Define measurable goals that align with your safety objectives and build team alignment.
- **Build the right team:** Create a change management team, including safety leaders and fleet managers, to lead by example and provide guidance.
- **Effective communication:** Develop a communication plan to keep everyone informed and increase buy-in.
- **Updated policies:** Adjust safety and operational policies to reflect new expectations and support compliance.
- **Team training:** Use Motive's resources to train drivers and managers, from in-cab alerts guides to app tutorials. Interactive sessions help team members gain confidence with the system.
- **Phased crawl-walk-run rollout:** Introduce features gradually to allow drivers and managers to adapt at each stage.

- **Positive recognition strategy:** Recognize and reward safe driving behaviors to reinforce good habits and foster engagement. Incentives or friendly competitions can motivate drivers and create a strong safety culture.

With Motive's support, your team will be prepared to adopt the new fleet and safety solution effectively, fostering accountability and long-term safety improvements.

Conclusion

A well-executed trial sets the foundation for a long-term, successful partnership with your fleet management and safety solution provider. By following these steps, you'll ensure that your team is prepared, data is collected accurately, and the trial provides actionable insights to make an informed decision.

Motive is here to support you every step of the way. For further guidance or to schedule a consultation, [contact us today](#).



Templates for trial evaluation

Use the templates below or access the [editable version](#) to document trial results. This structured format ensures you capture key metrics, compare vendor performance, and evaluate the trial's impact on your business goals.

Company name	
Company stakeholders	
Products in trial	
Vendors in trial	
Date of rating	

Desired outcome	Key metrics	Evaluation criteria	Motive rating	Comp rating
Improve safety	- Reduction in unsafe behaviors and accidents - Safety Score improvement - Time to detect unsafe behaviors - False positive rate	AI event detection accuracy <i>Best practice: set the same safety thresholds across vendors</i>		
		Accurate alerts for unsafe driving and compliance violations		
		Unsafe behavior reduction (e.g., close following, mobile device usage)		
		Incident reduction (e.g., forward collision warning, near collision)		
		Collision detection accuracy and response time		
		Ease of video recall		
		360-degree visibility with seamless access to side, rear, and cargo footage		
		Driver engagement (e.g., Driver App usage, feedback on camera effectiveness)		

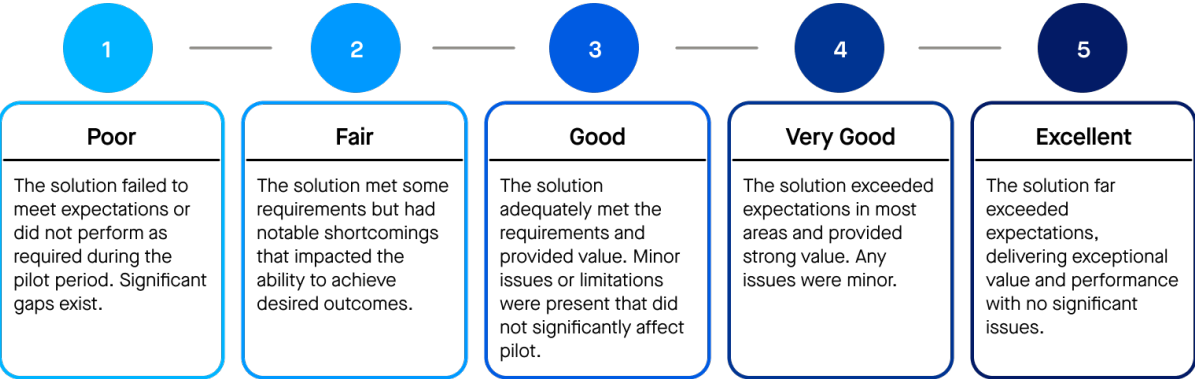
Desired outcome	Key metrics	Evaluation criteria	Motive rating	Comp rating
Increase productivity	• Reduction in violations	Integration with primary platforms and/or accessible APIs		
	• Reduction in time spent managing safety and compliance	Fewer manual processes and less time spent on tasks like requesting video, adjusting event thresholds, or modifying Safety Score weights		
	• Improved driver experience	Actionable vehicle and asset utilization reports		
	• Reduction in idle time	Ease and speed of retrieving key operational insights		
	• Higher asset utilization	Accurate and automatically generated compliance reports		
		Proactive management of HoS logs and violations		
		Simple safety and compliance workflows with customizable Driver App		
		Minimal downtime with flexible and seamless installation		
		Platform configurability (e.g., alerts, reports, Safety Score, safety event thresholds)		
Drive profitability	• Total cost of ownership with an integrated platform	Monitor fuel consumption trends across vehicles		
	• Idle reduction: fuel optimization	Reduced idling through idle reporting		
	• Fuel fraud savings (If trialing Motive Card)	Use of AI-powered tools and vendor's Safety Team to increase efficiency and reduce overall fleet risk		

Desired outcome	Key metrics	Evaluation criteria	Motive rating	Comp rating
	Asset optimization (If trialing Asset Gateways)	Streamlined reporting to ensure compliance with inspection requirements		
		Integrated system that reduces data silos and multi-vendor dependencies		
		(If trialing Motive Card) Ease of tracking fuel purchases and savings in real time		
		(If trialing Motive Card) Real-time, telematics-backed suspicious spend tracking		
		(If trialing Motive Card) Insights into more cost-effective fueling locations		
		(If trialing Motive Card) Savings on fuel, maintenance, and more at partner locations		
		(If trialing Asset Gateways) Ability to locate assets anytime, powered or unpowered		
Exceptional partnership	Training and best practice guidance	Innovative partnership with a willingness to grow and build together		
	Roadmap and innovation alignment	Customizable platform that meets the unique needs of the business		
	Customer support satisfaction	Fast-moving and responsive team		
	Platform uptime	High customer service standard		
	Average response time for support	Best practice guidance for change management and program rollout		

Note: The trial scorecard reflects what can be measured over the course of a trial. Additional measurements can be applied depending on trial duration and scope. Examples include:

- Insurance cost savings
- Reduction in fines and penalties
- Accident and exoneration savings

Rating Scale:



About Motive

Motive empowers the people who run physical operations with tools to make their work safer, more productive, and more profitable. For the first time, safety, operations, and finance teams can manage their workers, vehicles, equipment, and fleet-related spend in a single system. Motive serves nearly 100,000 customers from small businesses to Fortune 500 enterprises across a wide range of industries, including transportation and logistics, construction, energy, field service, manufacturing, agriculture, food and beverage, retail, waste services, and the public sector. Visit gomotive.com to learn more.