



Strategic Planning Checklist for Field Service and Fleet Owners

Use this checklist to take stock of your operations and gear up for a successful year ahead. For helpful tips on how to find information refer back to the [blog](#) on the Momentum IoT website.

1. Market Analysis – What’s the Outlook for Your Customers?

External – What does the future look like for your customers?

- What is the outlook for the industries you serve next year? Positive/negative?
- Are there any trends in technology or regulations impacting your customer’s growth plans?

Internal – What does the future look like for you?

- Are we doing better or worse than we expected this year?
- Do we have a strong pipeline of future work (3-6 months ahead)?
- How did our revenue and profitability trend over the past year? Was there a pattern?

2. Understand the Competition

- Who are your main competitors?
- How does your pricing, service quality, and reliability compare?
- Are competitors expanding their fleets or adding new services?
- Where does your competition advertise?

3. Know Your Customers

- Who are your top revenue-generating customers? What’s their percentage of your total?
- Are you relying too heavily on a few large accounts?
- Are there opportunities to upsell services to current customers?
- Who are “lookalike” prospects in nearby areas?

4. Fleet Maintenance and Efficiency

- Are your vehicles operating at maximum efficiency?
- How much downtime did you experience due to breakdowns?
- Can your fleet handle more jobs without expansion?
- Are you staying compliant with OEM guidelines to maintain warranties?



5. Pricing and Profitability

- Are you pricing services competitively while maintaining healthy margins?
- What's your win rate on job bids?
- Which services generate the most profit?

6. Employee Performance & Retention

- Are you regularly talking to your employees about their performance?
- Is there a clear path to better pay and/ or promotions?
- Are drivers adhering to safety standards? How do you know?
- Which team members are most efficient and reliable? How do you measure that?
- Do employees understand how their performance is measured?
- How do you reward top performers?
- How do you coach or retrain underperforming employees?

7. Marketing and Sales

- Are you using customer success stories to attract new business?
- Do you ask customers if you can use them as references
- Do you have a referral program?
- Which platforms (social media, digital ads, mailers) generate the best leads?
- How effective are your current marketing efforts? How do you measure that?
- How do you sell to new customers? Which ones get you the best results?

8. Technology and Innovation Considerations

- Are there tools or software that could improve your fleet operations?
- What's the ROI on tech investments you're considering? Does it make you more efficient? Cut costs? What's the payback?
- Can you automate things like reporting, preventive maintenance, gathering job data, etc. to save time and reduce manual work?