Views from the **Edge**

A collection of trucking, technology, and training columns from the past year

2024

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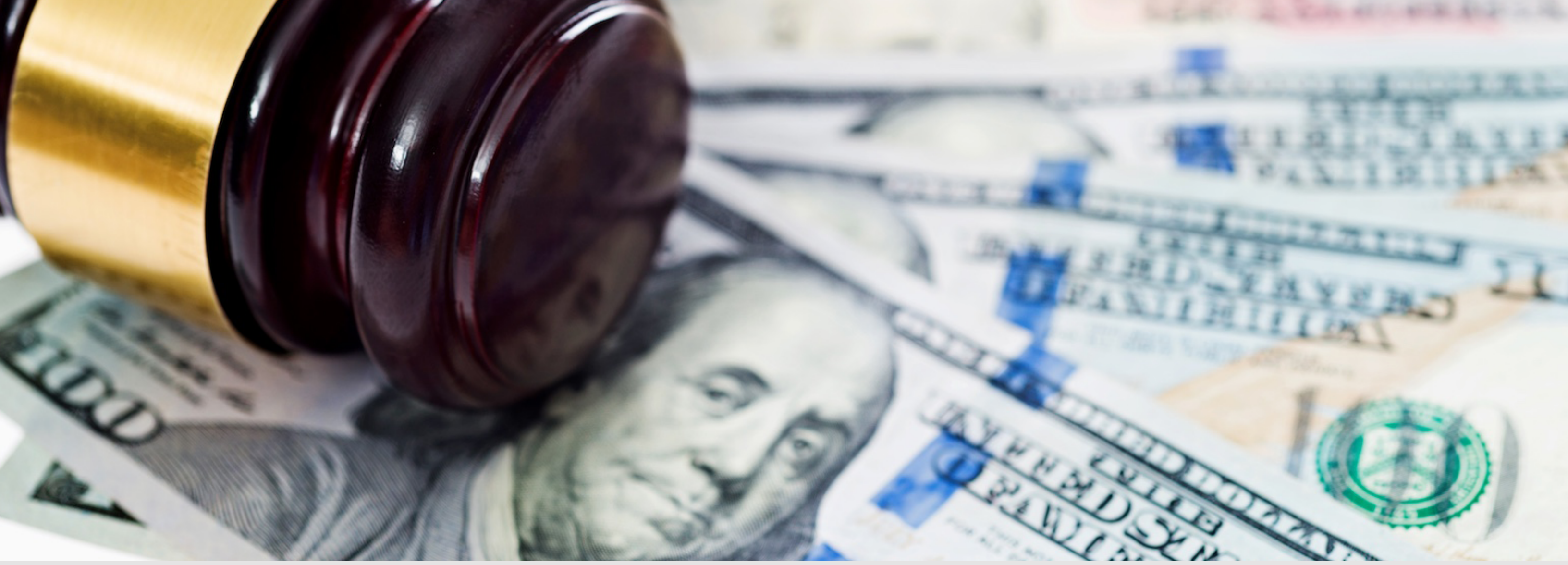


Profits Over Safety: How Driver Training Can Help, or Hurt, in The Courtroom

October 30, 2023

When fleets have had to defend themselves in a lawsuit, we've all heard about the importance of documenting driver training activities to prove that they happened. But protecting yourself in court takes more than just having the training documented. In a recent webinar, CarriersEdge sat down with attorney Kevin Mulvaney, partner at Wilson Elser to talk about some of the issues facing trucking companies when those companies are facing legal action. While this wasn't actual legal advice (you should consult with your own counsel for that), Mulvaney offered some reflections and insights on what carriers can do with their training programs to make their own lawyer's job a little easier.

Where companies fall down

Here's one of the most important things you need to know: if one of your drivers has an accident and you have to go to court, the plaintiff's attorney is going to go through all of your training and safety programs and policies. They're going to try to construct a story about how you are negligent, or you don't take safety seriously—basically to scare a jury into believing that your company is a danger to everyone and that the accident was just waiting to happen. Regardless of whether that's an accurate reflection of how you operate, the plaintiff's lawyer is going to look for things in your training programs and policies in order to weave that story anyway.

Also, it's worth noting that being a small company won't protect you. As Mulvaney points out, "The plaintiff's attorney is not going to care if you are that small". Even if there are only a few people in the office, all wearing multiple hats, gaps in programs and policies can lead to significant problems when the plaintiff's attorney starts digging through things.

What sorts of things might they jump on?

Not following your own policy
You have a policy written down that looks good, but then fail to actually follow it. Maybe what the policy lays out is too much for what a company your size can actually deliver—imagine a 10-truck company using a policy that originated with a 200-truck company. There would just be so much more in there than the small fleet could ever act on. Or maybe it's the right policy for your company but you don't have the right people in place to actually sustain it. Whatever the reason, don't over-promise and then under-deliver when it comes to safety and training policies. "It is very difficult to defend a company that created its own policy and then failed to adhere to them.," Mulvaney says. If you can't reasonably follow up with every critical event or training activity within 2 days of its occurrence, don't say in your policy that you will. If you need a week to complete that, spell it out in the policy.

Minimal training
You gave your drivers training during orientation, and you really drove home the idea of operating safely, but after 3 or 6 months the training stops. That's a bad idea generally,

but in a legal context, it can really haunt you. Even if you have a driver with a decade-long safe driving record, if that driver has an accident and the opposing counsel can demonstrate that the company didn't bother doing any refresher training or keeping the driver up to date on changes in the industry, the story they are going to tell about you is that your priorities were in the wrong place—you were concerned with profits over safety.

Some of the people, some of the time

If you have an ongoing training program but don't include everyone in it, that's also going to look bad. If you skipped some people, or cherry-picked who got training—especially if you did that to cut costs—that makes it very easy for the plaintiff's attorney to argue that you put profits over safety. The story will be that if you really did value safety you would have trained everyone equally.

Using free/generic training

And speaking of cutting costs, using free training doesn't help either. If your training consists of a bunch of videos you got for free, opposing counsel will use the "profits over safety" theme here as well—they're going to try and tell a story about how you are just 'checking a box' that something was done, rather than meaningfully advancing the skills of your drivers to make them safer.

> *There are ways of running your business—particularly when it comes to training—that can make it easier for them to defend you if you're faced with a court case.*

What to do instead

If you want to figure out if your training system is as defendable as your lawyer would like, try working backwards from an imaginary civil suit. If a plaintiff's lawyer is going to try and paint you as not taking safety seriously, how can your approach to your training program help counter that kind of narrative?

1. Invest in something

   Training doesn't have to cost the farm, but an investment can help show that you take safety seriously enough to spend money on it. If that investment includes access for everyone, and you can show that you use it regularly, you're off to a good start.

2. Automating can make it manageable

   Using that training program doesn't have to mean a ton of extra work. The right training platform will help you streamline and automate assignment and reporting processes so you can stay on top of them more easily.

3. No diving in the shallow end

   If a driver told you they could do a pre-trip inspection in 5 minutes, you'd know they weren't doing it properly. If your training lasts that long, a plaintiff's attorney is going to jump on it for exactly the same reason. If you want to demonstrate that you value safety over profits, look for training programs that reflect that seriousness and depth. Programs should include:

   - A deep dive into the content, paired with real-world context so your drivers get a complete picture of the material and practical tips on how to apply it.
   - Rigorous testing at the end of each course. If people can guess answers and pass the test, it's not hard enough. Challenging tests that require people to demonstrate a thorough understanding of the material will stand up to scrutiny better.
   - Detailed, granular tracking and reporting of driver activities and results, so you can see where they have gaps and know what to focus on.

4. Balance online and offline

   Online training can be a big help in keeping drivers trained, but it can't completely replace in-person activities in the yard or on the road. Track those practical activities and classroom events alongside the online efforts, so there's a complete picture of everything you did to improve that driver's safety performance.

5. Train as a process, not an event

   Don't think of training your drivers as something that is completed after the first 3 months. Their initial training should be followed by longer-term, ongoing training to keep their skills sharp and ensure that they are up to date on new regulations or technology. Also make a point of reviewing the results regularly to see where further assistance or coaching is warranted as well as other ways you can build out training and learning opportunities.

6. Benchmark

   Even though you are trying to develop a program that is manageable for the size of your business, how do you know you are doing enough? Have an expert look at your program and evaluate it against what's being done at other fleets that are a similar size/configuration to yours—because you don't want to be that one fleet on the block doing less than everyone else. Worried about the cost of hiring a consultant? It isn't nearly as expensive as losing a lawsuit.

For all the things you need to do to keep your business running, being a legal expert isn't one of them—that's your lawyer's job. But there are ways of running your business—particularly when it comes to training—that can make it easier for them to defend you if you're faced with a court case.

Even if you're a small carrier, you can leverage training technology to develop a program that is comprehensive but manageable for your fleet size. And having that kind of automated training and detailed reporting can help your legal representative push back when a plaintiff's lawyer suggests that your priorities are in the wrong place.

Kevin Mulvaney is a partner at the law firm Wilson Elser.

The Business of Safety, Part One: Drive Improvement, Not Just Compliance

July 3, 2024

Here's an unremarkable truth: safety managers think about safety and CEOs think about the entire scope of the business. Sometimes that means that there is a disconnect between what the safety manager thinks is the right move and what the CEO has in mind. But it doesn't have to be that way.

In a recent webinar, the CarriersEdge team had a unique opportunity—the chance to sit down with Trevor Bent of Easson's Transport, someone with experience in both the safety manager and CEO roles. Having seen how things work from both perspectives, Bent had some unique insights into how safety is managed and understood in the yard and in the boardroom.

In this first of a two-part series, we look at some recommendations for safety managers in terms of getting buy-in from drivers, from the C-suite, and what to watch out for in your own approach to driving safety results.

Common pitfalls

Safety managers sometimes get tripped up by three kinds of problems:

- Over-relying on regs for enforcement,
- Not being consistent with messaging and follow-through, and
- Not knowing how to get executives on-side with what they are trying to do on the safety side.

However, there are ways to manage all three of those if you know what you are looking for.

I've got regs

Recalling his earlier days, Bent notes that a lot of safety managers fall into the trap of focusing on compliance, which basically makes them an enforcer. Believing that their true role is ensuring everyone is following the rules ("I've got regs and you have to listen!"), these kinds of safety folks can come off as bristly investigators, rather than a source of support for the team.

The reality, Bent says, is that "this is a people business", and the hard edge is less effective than people think. Sure, you can come at people hard and be uncompromising. Still, ultimately that's just going to put you in a position of putting out fires (and having people dread talking to you), rather than being a resource for the steady improvement of your people's skills, the safety numbers, and the bottom line of the business.

Instead, take a longer view of figuring out how everyone can improve, and think about problems and incidents not simply as violations, but as opportunities for progress. "I always tried to be assertive and passionate about what I needed to do, but in a non-threatening way," Bent reflected.

When someone has an incident, you now know what they don't know (i.e. where their skill gap is), and that gives you a place to start when you are figuring out where you want them to be in the future. Bent's advice? "Build a reputation so they know you're not going to back down to get the right results, but they also know you're going to work with them to understand what the barriers are."

Use the front office to build credibility

Safety managers need to build credibility with drivers, which isn't always easy to do when everyone knows they aren't the ultimate boss (this is also one of the reasons they can fall back into the compliance enforcement trap mentioned above). That becomes even more difficult when the messaging differs between the front office and the front line. According to Bent, executives and safety managers all have to be on the same page, and the language you use to explain things to drivers should be the same thing they hear from everyone else.

> *Safety managers need to build credibility with drivers, which isn't always easy to do when everyone knows they aren't the ultimate boss*

Why? When you have to talk to a driver about lagging performance, there is a risk that the driver will think it's personal (even when it's not)—especially if you are the only one ever talking to them about those things. Yet when you have clear, consistent policies that are endorsed from the top down, the things you are critiquing will seem familiar—when every all-staff call, policy update or even a casual comment from the front office is exactly the same message that a driver hears from the safety manager, an intervention no longer seems like a personal attack—it's just the way the company runs.

The critical part is that you have to be consistent (and the C-suite has to be consistent, too). Even if letting someone go means you're going to be short of drivers, everyone from the top of the company all the way down needs to be okay with that. "Be consistent—have those hard conversations and exercise due diligence," Bent says, "because the minute you have a gap in that oversight, you're going to have a problem."

Talking numbers

You've decided that you are going to commit to pushing improvement, rather than just chasing compliance. You've got a plan for how you want to do it, but if you've got an executive team that doesn't have a background in safety, there may be details that are obvious and relevant to you that don't resonate as clearly with them.

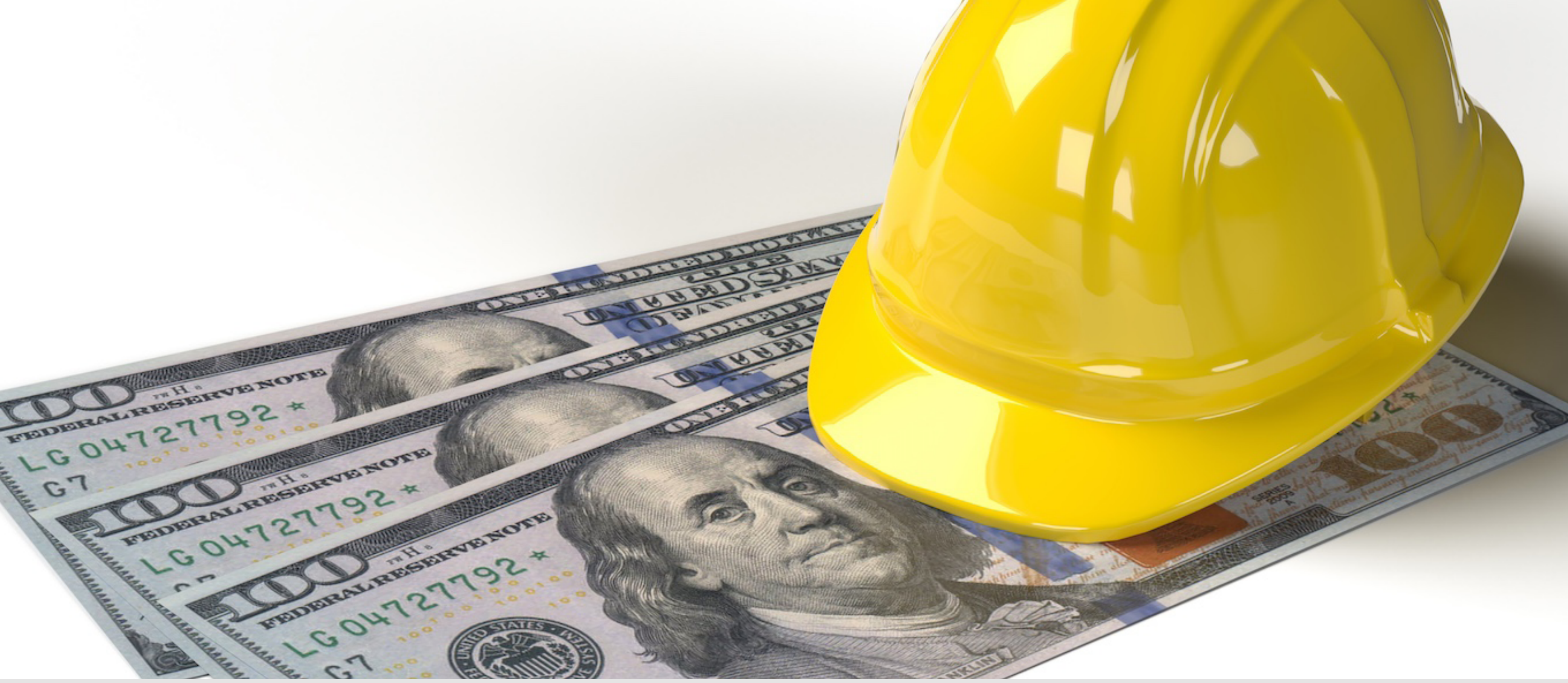
So how do you do you get them onside? "Figure out what the key safety metrics and KPIs are and focus on one or two of those things," Bent says. "Get those in front of the leadership in a very quantitative way—be ready to show the numbers, prove that you can move the needle, and show the return on investment."

And when you're thinking bigger, and want to try a new program or initiative, get used to presenting formal, structured, well-reasoned arguments for what you want to do (and for an example of how to do that and what kinds of things to think about, try this post).

Build your brand

Bent's best advice for safety managers? "Build yourself a brand of continuous improvement, not continuous compliance." If you can establish a reputation as a builder rather than an enforcer, both the front line and the front office will come to trust you as a reliable resource for enhancing your people's safety and the business's bottom line.

So what about the flip side? Why (and how much) do CEOs need to pay attention to safety (beyond what things are costing), and how does that connect with everything we've said so far? The answer to that will be in next month's article. Stay tuned.



The Business of Safety, Part Two: Connecting the Front Line to the Bottom Line

August 7, 2024

In Part 1 of this series, we looked at some advice for safety managers when dealing with CEOs, from someone who has occupied both roles. It's difficult to find a person with a wealth of experience working both in safety and running a company, so when Trevor Bent from Easson's Transport showed up, we listened. In that previous article, he [described a series of ways] that safety managers can generate buy-in from both drivers and execs, as well as develop their own personal brand of constant improvement instead of just constant compliance.

But what about the other way? If you're in the C-Suite, what more do you need to know about safety beyond the dollars and cents of it? As it turns out, there is a whole set of recommendations for executives who don't necessarily have a safety background—especially how you can use safety-specific metrics to manage the business's overall health.

Three big issues stand out:

1. Safety and the bottom line
2. The tug of war between departments
3. Staying on message

Why safety is key for the bottom line

Ultimately, the CEO's role is to grow the value of the business—'show me the money', as it were. And there will inevitably be pressure from investors, advisory boards, or similar stakeholders to make those dollars happen.

However, safety isn't necessarily one of those immediate impact investments—it's more of a slow burn. So how do you get those stakeholders excited about something that is going to produce value incrementally and down the road?

Bent suggests that "any leader in trucking that just talks about revenue and reining in costs without talking about safety (especially exposures, liability and risk), they're missing a very, very, very big piece of the puzzle." That's because growing the business isn't just about expanding your reach, but also about managing the value you have and making sure it isn't bleeding away.

When looking at financial statements, Bent says he "almost always goes to the 'Other' items (category) which speak to claims and accidents, because it is often more indicative of how your month is going to turn out." From managing customer expectations around receiving their goods on time and in proper condition, to keeping people safe and working, to minimizing exposure and the need for claims, safety is a core driver of the profitability of the business, especially when other elements (like rates, volume, etc.) have so much variability.

If you want to make sure you're keeping what you're earning (while also looking for new opportunities), Bent's best advice is to focus specifically on those safety KPIs. And that's something that even the stingiest investor should get behind.

Tug of war

Bent notes that moving into the CEO role has meant getting a close-up view of how different departments strive for their own targets and goals, and it's up to the front office to orchestrate those different objectives. "You start to see the tug of war between, say, production and operational demands, safety, HR," which may lead some leaders to think of themselves as referees, rather than something more.

The opportunity, though, is that "you can help people see how things interconnect, draw parallels for people by sharing their respective needs. You start to lead better when you can, for example, show that safety and operations have a lot more in common than people might think." By bridging those understanding gaps (and spending time with each department so you understand them), you can spend less of your time on conflict resolution and more of it on process management.

> *Growing the business isn't just about expanding your reach, but also about managing the value you have and making sure it isn't bleeding away.*

Staying on message

In Part 1 of this series, it became clear that one of the most important things for a safety manager to have is consistency from the front office in terms of messaging. When the things that safety managers are talking about are backed up by everyone above them, their effectiveness as safety managers skyrockets.

To make that happen, though, CEOs (and other leaders) need to have a good understanding of what those folks do and what they need—even if the execs themselves don't have a safety background. "I make sure I spend time with my safety lead each month to find out how they are driving improvement and making sure they are getting the support they need," Bent says. From there, it's about accountability and consistency.

Because your safety people are so critical to the bottom line (as we've seen), empowering them to deliver on the improvement programs they've championed and supporting them with consistent, from-the-top messaging is vital. (Pro-tip: if you've got a quarterly blitz about cracking down on distracted driving across the company, don't call into the all-staff meeting on your car phone.)

The point here is that even if you don't have a safety background, there is significant evidence that you'll become an even stronger leader if you do the work to at least understand how critical safety is to the functioning and well-being of the business as a whole. Monitor the right KPIs. Understand the connections between safety and virtually all of your other departments. And stay committed to the goal of constant improvement. Your customers, your people and your bottom line will thank you.

Open Wide:
It's Time for a Cargo Security Check-Up

February 5, 2024

You wake up one morning and discover you've got a toothache, and one trip to the dentist shows you've got a cavity. Now, you're brushing and flossing madly to make up for lost time. But in the back of your mind, you know that if you did all those things regularly throughout the year, you'd probably have fewer problems.

Cargo security is a lot like that: every year around the holidays from Thanksgiving to Christmas, thieves and bad actors ramp up their efforts to find a weak spot in your business (kind of like a cavity). And every year around the same time lots of publications talk about the need to protect yourself, like here and here. But instead of just thinking about it at that point, looking at your security vulnerabilities year-round will actually put you in a better position when thieves come knocking. Think of it like brushing after every meal.

In a recent webinar, CarriersEdge hosts Rick Duchalski and Mark Murrell were joined by Joe Palmer, Senior Vice President and National Practice Leader, Transportation at Gallagher—an insurance and risk management company—to talk about how preventable cargo theft problems are, as long as you're managing your vulnerabilities.

The holidays are getting hotter

While the holiday season is generally a time when we see more cargo theft, Palmer points out that theft rates were even higher than normal in 2023, in large part because of the economic conditions. Not only that, the types of items being targeted were not always what you'd expect. "People often think of electronics being targeted, but the increase in food prices has pushed food and beverage theft to the top spot," Palmer notes. One of the other problems, Palmer says, is that drivers and carriers let their guard down when they're hauling things that aren't as sexy—pistachio nuts and chicken don't seem like high-value targets, but they're absolutely on the minds of thieves because they're going to take whatever they can sell later on.

To complicate things even further, it isn't just physical theft that people need to worry about—carrier identity theft can be just as big a problem. While some cases of double brokering involve the creation of a fake company under a fake name, in other cases fraudsters are passing themselves off as legitimate carriers, spoofing insurance certificates and other identifiers. Whether you're facing a fraud threat or a physical one though, preventability comes down to being aware of your vulnerabilities and making sure you've got the right processes in place.

So let's look at them one at a time.

Physical theft

One of the best ways to protect yourself from this kind of theft is through managing your exposures. On the carrier side, there are some basic best practices like having strong controls over the traffic coming in and out of the yard as well as not leaving trailers unattended. "A lot of it comes down to having the right protocols and procedures in place," Palmer says, whether that's using GPS tracking, geofencing and of course physical locking devices. But the most important part has to do with the driver.

Training drivers on how to stay safe while on the road should include proper route planning—especially figuring out which truck stops and rest areas are trustworthy and which aren't. And while a driver's situational awareness can help in all sorts of situations, there's one place that they often overlook. "Don't post every move you are making on social media," Palmer says. Drivers will sometimes lay out all the info thieves need in terms of what cargo was just picked up, where it's going and what route they're taking, all in the name of staying in the social media conversation. What's more, those drivers are also telling people that they're not home, and may not be home for several weeks until the trip is over! In the wrong hands, that information could end up causing more pain than a root canal.

So what's the takeaway? Make sure your drivers are well-trained in what to watch out for, and have them keep these three keys in mind:

1. Routes

   Drivers should choose their routes carefully. If they're going to the same locations frequently, they should make sure to vary the routes they take when possible. Using the same route and stopping in the same locations can make them an easier target for thieves.

2. Loose lips

   Whether they're at the truck stop, on the radio or anywhere else, drivers should not talk about the contents of their load with others. And watch what is said on social media. Facebook and other platforms can be useful to all companies, but loose lips sink shipments – don't discuss your cargo.

3. Who needs to know?

   Drivers should stay in regular contact with the dispatcher and tell them when each stop is reached, when they are stopping for breaks, when the load is dropped and when they are leaving again. Keep in mind that cargo theft can sometimes be an inside job, so only key company personnel need to know the route and the cargo.

Identity theft

It's late in the afternoon on a Friday and you need to broker a load that one of your normal carrier subcontractors can't cover. So, you end up dealing with a company you are less familiar with. On paper though, they look legit—they've sent you their authority information and insurance certificate, and it all seems to look good.

> *Preventability comes down to being aware of your vulnerabilities and making sure you've got the right processes in place.*

Unfortunately, though, it's actually someone passing themselves off as the legit company—they end up getting the load and then the load 'disappears'.

This problem, as Palmer says, is becoming more common and fleets need to watch for the signs of trouble. One main cause is that newer, smaller fleets are sometimes eager to show the world that they're legit, so they post all of their credentials on their website: exactly what identity thieves are looking for.

But for the company that was duped by the fake credentials, was it preventable? Palmer says yes, "as long as you are willing to look a little closer to make sure they are who they say they are." Here are some things to think about:

1. Official documents

   Did the insurance certificate come from the insurance broker directly, or is it the person you're talking to on the phone who's giving you that information?

2. Are they who they say they are?

   Did you call the carrier's main line phone number and ask for the individual, or did they just give you a cell number that you called directly?

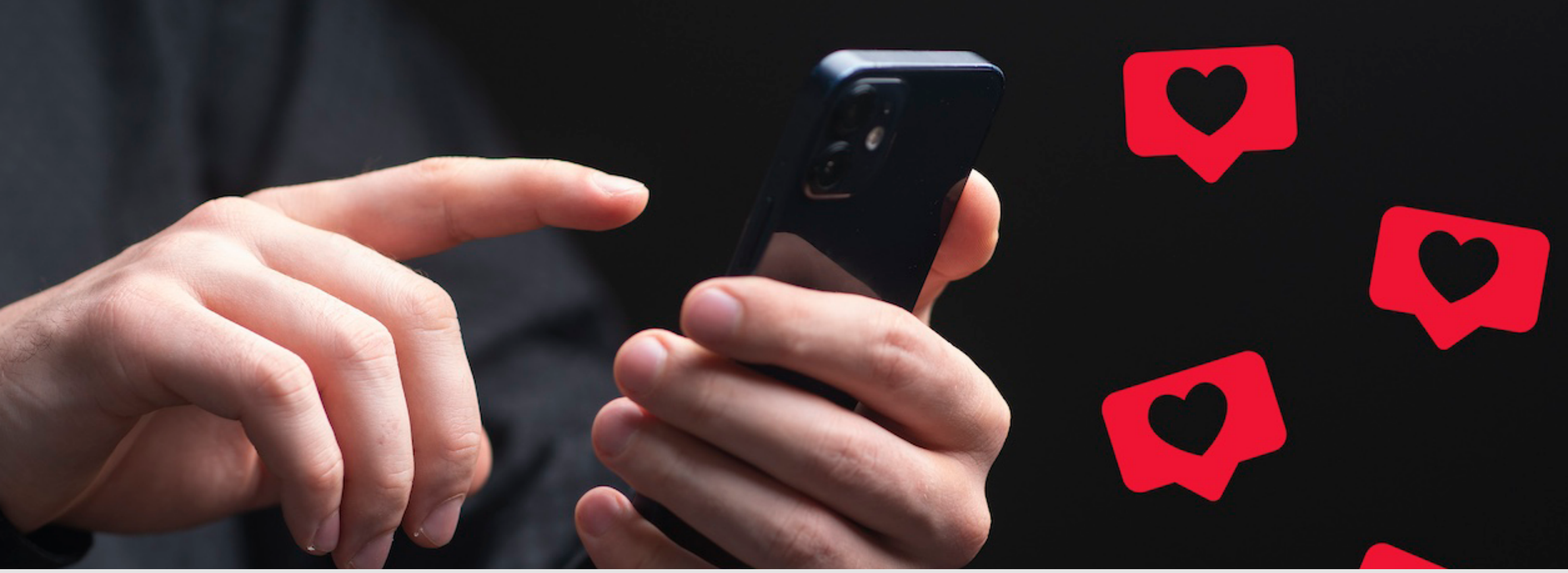
3. Suspicious contact info

   Are they using a real corporate email address or is it a generic Gmail address? As for the physical address, use Google Maps to confirm that it is in fact a trucking company or yard, and not just a PO box in a store somewhere.

Simple questions like these can help you get a clearer picture of who you are dealing with and can expose a bad actor pretty quickly. Even better, you can put questions like these into a 'new broker checklist' (talk to your insurance partner for something like this) that you can run through with every new contact—a little like a pre-trip inspection. It's not a lot of extra work once it's part of your regular procedures, and it can save you a lot of pain when someone is trying to take advantage of you.

Like preventing cavities, preventing cargo theft means making it part of your regular routine, rather than reacting after you've already got a problem. Training your drivers in what to do and what to look for, using fleet management technology (like GPS tracking and geofencing) to your advantage, and being diligent about taking on new brokers (or any new business relationship) will help you avoid pain not just around the busy holiday season but all through the year.

TRAINING AND TECH



Swipe Left or Right: How to Pick the Right Training Program

December 5, 2023

Figuring out which online training program is right for you can be a lot like using a dating app. Not only do you have to have a good sense of what you're looking for to begin with, you also have to deal with swiping through all those possible matches (including the bad ones). In a [recent webinar](), Communications Specialist Rick Duchalski sat down with CarriersEdge President Mark Murrell to discuss evaluating your company's needs and what to look for in a prospective match.

> *Choosing the right online training program is not just a matter of blindly swiping left or right—it's about making a strategic decision that impacts your company's safety, compliance and your drivers' knowledge.*

Do I need to move online?

If you're a small or midsize fleet, there are some constant pressures on your training needs that you need to be aware of. The first is the pace of change in the industry—given the number of things that drivers need to be kept up to date on and reminded of (from regulations to tech advances and more) you can't reasonably do that with a strictly classroom format. Finding a way to get the right information to them on an ongoing basis is crucial.

Another is that pulling them in every time means that (a) they are not on the road making money or (b) not at home enjoying the rest of their life. So while you can still pull them in for quarterly meetings, getting them training in a format that works for them shows some respect for their time. (The other possibility is that you could just train them less, but Profits Over Safety: How Driver Training Can Help, or Hurt, in The Courtroom tells you why that's a really bad idea.)

How do I know who's right for me?

Once you're ready to pick an online program though, you shouldn't need to go on a bunch of bad dates to find out who is and isn't right for your company. Here are some features to look for that can help you figure out if you've got the best possible match.

1. Content with context

   In the classroom, a good trainer will usually put the training in a real-world context by offering stories about how it helped them, or use practical descriptions of tasks and skills they're talking about. Murrell notes that while online training is different from in-person, a good online course still "needs to include context so the drivers can see, okay, I get how this relates to me." Regulatory material can be especially dry, so look for content that brings a relevant, in-context, put-it-into-practice angle. That can be anything from real-situation applications laid out within the course content to supplementary material supplied for in-class follow-up instruction when you get your team back in the classroom.

2. Address different learning styles

   People like to learn in different ways, and different industries might have more of one kind of learner than others (lots of people who learn by reading end up in law, and lots of visual learners end up in the arts, for example). "Trucking," Murrell says "has got a very even mix of people who learn with different styles. So, effective education material needs to have something for people to read, something for them to listen to, and they need to have a chance to see things and to actually do them". Approaching them with content that is presented in just one style (like simple videos) risks missing a lot of potential learners. And remember, if your content doesn't do that, you risk having different learners start to struggle with the material, and when that happens, you may start to get pushback from your drivers on the whole online experience.

3. Language and pace

   Does the program have different languages available (with actual, quality translations rather than just Google Translate)—this means French for Canada and Spanish for the US. And for other ESL learners, does the program move at an adjustable pace so some people can slow down to understand it, while also letting others breeze through if that's what works for them? Murrell points out that with some e-learning products, there is an enforced amount of completion time and "you have to go at a certain pace—you can't skip certain things and you can't go back and go over it." But if that's the kind of support your learners need, then you should look for a product that can give them that.

4. Outcomes-based

   If moving online is going to be effective, you need to have a good sense of how well your people are learning the material. That means you need to know more than just how much time they are spending on the courses. The tracking and reporting of results should be based on measurable performance on assessments rather than just 'time spent'. That kind of reporting will allow you to get a closer look at how people are learning (or if they are at all) so you can adjust your attention and follow up accordingly.

5. Know your vendor

   As much as you are looking for an online training product, it's crucial to consider your potential relationship with the vendor (at this point it really is like using a dating app). What's their customer support like? What about the average downtime of the system? And beyond that, although they can meet your needs right now, remember that over time, your company and your needs are going to grow—so you should figure out if the vendor has the flexibility and response capability to meet those changing needs. Find out if they are open and responsive to feedback and whether they are willing to work on new capabilities with you as your needs change.

Choosing the right online training program is not just a matter of blindly swiping left or right—it's about making a strategic decision that impacts your company's safety, compliance and your drivers' knowledge.

Consider programs that offer more than just information—they should provide context, cater to diverse learning styles, accommodate different languages and paces, and deliver outcomes-based assessments. The right training program should grow with your company, offering continuous support and flexibility as your needs evolve. And just like on a dating app, once you know what you are looking for, take your time and find your match.

Not All System Integrations Are Created Equal

May 1, 2024

If you're unfamiliar with the term, "system integration" can sound uncomfortably technical, even jargon-y. But all it really describes is how two different programs (like your HR system and your dashcams) can talk to each other and share information. And in a lot of cases that can be extremely helpful by making some of your operations more efficient. But is it always helpful, or even a good idea? In a recent webinar, Rick Duchalski sat down with Selase Hotsonyame and Mark Murrell to talk about system integrations—why it's a buzzword in the industry, what you should look for in an effective integration, and where the hidden dangers are.

Two parts

Murrell points out that there are two significant parts to any integration—one that people often focus on, and a second, more important one that people seem to spend less time thinking about. The first one is the basic communication between two systems—the basic matter of translating and communicating with each other. This is simply the question of whether your dashcam system can transfer information to (for example) your training system in a way that that training system can understand and use it.

But the second part is the utility issue—have you figured out how that communication produces something meaningful and useful for the user? Is it actually solving a business need I have?

Capability versus need

Just because an integration can do something for you, that doesn't always mean it will make your life easier. For example, suppose your company has developed a way of doing something manually (assigning and tracking training assignments, for example). In that case, you may not want to immediately pivot to automation if you're not ready for it. Sure, your new dashcam system can automatically trigger remedial training based on events, but it might be that your safety manager has developed a method of personally interacting, intervening and assigning new training based on what he sees when he actually talks to the driver. Removing that tool from his toolbox just because the new integrated systems can do it might actually make his job harder (or make him less efficient, ironically).

So, in some cases, taking advantage of an integration may not get you a net benefit if the new functionality doesn't properly align with the processes you already have in place. (Note: sometimes the processes you have may be out of date/antiquated, and pivoting to a new way of doing things can legitimately help—the point is that this isn't always the case.)

Privacy and Security

When it comes to security concerns, Hotsonyame points out that there are really two different problems. The first is a question of what is happening to the data being shared across systems--what are they doing with the information, what do they have access to, and do you want that?

For example, if an integration partner is pulling driver records, sometimes they are inefficient and pull all sorts of extra data that they don't need. Still, they are pulling it anyway because they didn't bother to tease out what they did and didn't need from the beginning.

Why is that a problem? If you have a data retention policy (where you delete employee data after a certain period), but the integration company doesn't, all that information you think you are eliminating is continuing to live on somewhere else. There are companies whose main focus is data mining and data brokering, so it's important that you're aware of the intentions of any new integration partner you might be looking at.

Still further, when it comes to security, any time you are moving information from one system to another, you risk your data being exposed if security protocols aren't tight. Even if all the partners involved in the integration are honest brokers (they agree with you on how the data should be shared, stored and deleted), the risk of hackers looking for ways to exploit weaknesses in the integration should be cause for concern.

> *Just because two of your systems can integrate, that doesn't mean the new functionality will be what you need.*

What should you do?

So what should you do with all of this information? Here are some things to think about if you are thinking about integrating some of your systems (or you are approached by a vendor who is suggesting it might be beneficial):

1. Be clear on value

   Just because two systems can be integrated doesn't mean it will gain you a benefit. When you clear away all the technical jargon in the proposal, spell out the terms of the new capability in terms of what new value it can bring you, or what current headache it actually solves. If that can't be articulated, it may not be something you need (or need right now).

2. Integration to automation

   This one is a subset of the previous point: integration is a step toward automating some process or set of processes, so be sure to figure out if automating that process will really help. It might be the case that, for now, doing it manually is still giving you a lot of benefits or allowing your people to do their jobs with more care or precision.

3. What are they doing with my data?

   There are a lot of companies out there that are looking for ways to monetize other people's data. If you are looking at sharing your drivers' information with another company with an integration, find out their policies on data protection and use, and make sure what they are going to do with it aligns with how you want that information treated.

4. Prepare for a new task

   Suppose your people's data is now showing up in multiple places. In that case, you are going to have to take on some data management tasks—because now you have to keep track of where everyone is within each of the systems; if you're not paying attention, one person's old system ID might get applied to a new person in the integrated system, and now you have potential data and account confusion. Getting up to speed on managing the new system on an ongoing basis may not be something you planned for, but you'll need to keep an eye on it if you want to continue to realize the potential efficiency gains you were looking for in the first place.

5. Security

   Even if your new partners are honest players, any sharing of information across systems comes with risks from bad actors. Make sure your cybersecurity protocols (and training) are up to date, and verify that your new partners are taking it as seriously as you are. And don't be afraid to call in a consultant for an evaluation if you're not sure how secure you are.

System integrations can absolutely be a benefit to your enterprise—but just because two of your systems can integrate, that doesn't mean the new functionality will be what you need.

Getting clear on your goals, your problems, your needs and your concerns will allow you to have honest and thorough conversations with those who are proposing an integration for you and help you decide if that next move is the right one, right now.

TRAINING INSIGHTS

Crafting Effective Online Training: Expert Insights

October 2, 2023

A lot goes into building an effective training course, and not all the steps are things people might expect. For content that isn't spelled out in regulations, it's even more complex. That kind of material is rarely documented in one place, and every trainer has their own take on it. In a recent webinar, CarriersEdge President Mark Murrell sat down with Tiffany Cancian and Rick Duchalski from the CarriersEdge Content and Marketing teams to break down all the things they do when building courses on non-regulatory subjects. They covered:

1. Scanning the horizon: Where to start?
2. Into the weeds: Research
3. Clearing the underbrush: Designing with purpose
4. Building the path: Putting it all together

Scanning the horizon: Where to start

The content team writers have backgrounds in instructional design, writing and research, but they still need to figure out which topics need to be covered. Sometimes industry partners will ask directly for a new course, but sometimes writers have to go out and discover the need. They need to monitor the industry constantly by attending events, trade shows, webinars and information sessions, as well as regular news monitoring. This helps identify trends and issues and, as themes emerge, they can zero in on the topic that will best address the concerns that the industry is talking about.

Once they have the topic, the process starts to get a little more focused and the writers can begin to dig into the material.

Into the weeds: Research

Researching the course topic can sometimes involve chasing information in all sorts of directions, even into things that won't necessarily make it into the course itself—but getting into the weeds like that will allow the writer to make choices about what to include and what to leave out. At this point, it's all about collecting information.

> *Creating effective online training courses is about bringing together the right components: people with know-how, well-thought-out processes, and a clear understanding of the purpose of the course in order to get people the right training in a way that sticks.*

For non-regulatory courses, writers will use sources like consultative bodies (e.g., the Governor's Highway Safety Association or the Virginia Tech Transportation Institute), industry perspectives in magazines and webinars, as well as directly interviewing subject matter experts on the given topic. Cancian also notes that "Driver forums are really important for us to research" to get a clearer sense of what's relevant for the driver. Driver-produced YouTube videos are also immensely useful, especially for hands-on insights that just won't be found anywhere else.

This last point about what's relevant to the driver is crucial—as writers move through different sources and really get 'into the weeds' of the material, they end up discovering all sorts of things about the topic that they didn't know before. But that doesn't mean that it's information drivers will need to know when taking the course. Keeping the target audience in mind is critical for deciding which material needs to be covered and which can be left out.

Clearing the underbrush: Designing with purpose

As the writer works through the research, the course will begin to take shape with the help of three elements: learning objectives, story and language.

The learning objectives provide a guiding structure—what is it that the writer wants the user to take away from the course? What do they need to have learned in order to call it quality training? Once the writer has a sense of these objectives, they can use them to decide which content belongs in the course.

But just focusing on the objectives alone could turn the course into a long list of boring facts—this is where the story comes in. All of the courses involve some kind of creative story the user can follow as they move through the material—and this is what allows the writer to strike a balance between content and engagement. By telling a story with characters that are followed throughout the course, the content avoids becoming a list of stiff factual points that are soon forgotten.

Filtering the content and learning objectives through a story does something else—it forces the writer to use normal, everyday language (since it's going to be spoken by the voice actors)— "The importance of the story and character—using them effectively blocks you from just dropping in large chunks of your research because a believable character just isn't going to talk like that," Duchalski says. Cancian agrees: "That helps with the flow and comprehension of the text, as well as keeping our word count down."

So when they talk about designing the course with a purpose, it's about delivering the learning objectives in ways that cover the material while also being engaging.

Building the path: Putting it all together

Once the storyboard is written, they also need to think about interactivity—what are the different ways the user can engage with the content: popups and buttons? Self-assessments? Drag-and-drop mini-tests? Choices here will have implications for other teams who will be working on the final product because the written content is now at a point where other departments and specialists can be involved. It might need an on-site photoshoot with the graphics team or a new interactive widget with help from the technical team. But as the course is handed off to the next set of experts, there is constant contact with the writing team to make sure that each step of the project lifecycle keeps the learning objectives in focus and intact.

Building courses in this way involves a lot of moving parts: from identifying current industry needs and diving deep into research to designing engaging narratives and ensuring the content is relevant, every step is carefully curated. Creating effective online training courses is about bringing together the right components: people with know-how, well-thought-out processes, and a clear understanding of the purpose of the course in order to get people the right training in a way that sticks.

Lights, Camera… Details

April 3, 2024

When you see a (good) movie, the overall experience should leave you feeling exhilarated, or frightened, or heartbroken—whatever the creators intended when they decided to tell the story. But a critical part of that is a whole set of details that have been sweated over in order to give you that final experience—the color palette, sound, lighting, costume, music, and so much more. And the trick is this—when they are all done right, you won't really notice most of those details explicitly; but when they are done wrong, they can ruin the whole effect.

In a recent webinar, we spoke with Deanna Bowlby from the CarriersEdge Content team and Amber Hutt from the Support team to look at how much thought goes into the behind-the-scenes details and why it's critical for the overall user experience not to miss any of those hidden steps.

Building a seamless experience

On the content side, Bowlby describes an elaborate system of research, vetting, review and production before a course can ever see the light of day. At its inception, the rigorous research of the topic requires consistent cross-referencing with SMEs. Once the core content is set, though, it still needs to move through graphics, voice, and translation. Finally, there's a separate block of work that goes into building the tests and assessments to make sure they reflect the material accurately.

And just like in a movie, the user may not even notice a lot of that attention to detail precisely because it's done right.

If the voiceover speed is off, or a translation uses the wrong word, or a clickable button doesn't work right, the effect is broken, but if sufficient care is taken during the building process, the user should only notice a seamless experience.

Where things get tricky

Unlike a movie, however, the challenges of providing that great user experience don't end once the title is released. Courses need to be updated and refreshed to remain current, and that presents a host of other challenges.

Under normal circumstances, a driver will have courses assigned to their profile, which tracks usage, completion, test results and more. This reporting and tracking feature is particularly important when it comes to retraining intervals and certification expiry because it allows safety managers (and insurers!) to know exactly who has what training and who is going to need recertifying and when. It also shows the complete history of when drivers have taken courses, and how well they performed with them. But when courses get refreshed, that history can get skewed if care isn't taken to preserve it.

When changes need to happen

Courses can change in different ways—maybe there is new information to go in, slight updates to a few pages, sections that are no longer relevant, or the underlying regulations have completely changed. Depending on how much is changing, the course may need to be refreshed, or it may need to be retired and replaced completely. For example, suppose a course is just receiving some updated content but the overall structure and length of the course remain the same. In that case, the team can just swap out the old one and the user shouldn't notice any big differences (apart from the new information). On the other hand, if there are large, wholesale changes that require entirely new modules and structure, the course would have to be switched out completely for a new one.

> *And just like in a movie, the user may not even notice a lot of that attention to detail precisely because it's done right.*

That creates a wide spectrum of "update" options – everything from small wording changes to complete replacement – but that also opens up the question of how to reflect that in a driver's profile. For smaller changes, most fleets wouldn't make drivers retake a course they've already completed, but if it's a complete rebuild then it may be necessary to redo it.

If a driver's recertification timetable is attached to a course, and that course is being replaced by a new version, wouldn't that disrupt the reporting and tracking because that data is attached to the original course? The answer is yes, if you're not paying attention to the process carefully.

When originally faced with this problem, Hutt says that the team had to rethink the user's admin dashboard and redesign it to include a new section for "retired modules"—a place where managers could easily distinguish between new and retired modules, and track histories attached to each. When a course is being replaced, the Support team has a rigorous process for identifying all the places where assignments and histories need to be updated. She goes on to say "Our development team works in the backend of the LMS to 'link' the latest completion or course status from the original course to the new course." This ensures that if the old course shows as complete in reports and on the user profile, then the new course will display the same properties. It also makes sure that if any customers have assigned a retraining interval to the course, the next time users need to retake the course they'll be assigned the new course and notified correctly at the right time.

How the team figured out this solution highlights one more element to "sweating the details"—thinking up creative solutions. It's one thing to know which details to pay attention to so you get them right (i.e., the problems you already know will come up); it's another thing to be on the lookout for problems you haven't faced before, and have the creative flexibility and resources to take them on and find a solution.

Movie magic, but more

In the end, getting the user experience you want is a mix of rigorous attention to all the details you know about (like making a movie), as well as a dynamic, creative response once you've rolled it out—having the sensitivity and responsiveness to see when a change is needed and to manage it in a way that the user barely even knows is happening. And that's how the real magic happens.

The Goldfish and the Red Herring: Why Attention Span Isn't the Problem With Your Training

June 6, 2024

Is our ability to pay attention less than a goldfish's? If we believe at least some of the stories in the media, everybody's attention span is shrinking (like here and here). On the other hand, if you look a little more carefully there is no shortage of counterarguments (like here and here), saying that no, in fact our attention spans are not shrinking, and the research that says that is just studying the wrong thing.

Why is the answer important? When it comes to training your team, it's important to know if (and for how long) they are going to pay attention to you. Can you sit them down for a whole day, or are you stuck with tiktok level soundbites? If the real problem is a societal one (i.e. if everybody's attention span is faltering), it might feel like there is nothing we can do to make training more compelling, except make it shorter. But is it true? The answer is surprisingly straightforward.

The problem

"My drivers can't focus that long." "All they want is shorter training." There's a longstanding perception that drivers don't like to do training (and want to do as little of it as possible)—and that perception has been around longer than the recent hand-wringing about attention and focus. But let's stick with that argument for a moment, and consider whether or not attention span is an issue.

If you look at the links to the articles above, you'll see that there is at least some disagreement over what's happening with attention, and disagreement even over what it is they are studying. One of the reasons a lot of different researchers give conflicting answers is that they are actually studying different things. One researcher might evaluate how long a subject stares at a newly opened Word document before they look at something else. Another might look at how often students fidget during a lecture. Still another might be looking at something else.

> *If drivers are asking for shorter training, it's probably less helpful to write that off as a function of a waning ability to pay attention to things. Instead, think about what else might be going on there—there's a good chance that the real issue is how locked in your drivers are to your training culture as a goal*

And as for the rest of us non-researchers, our own experiences can give us conflicting evidence. On the one hand, lots of us have had the experience of scrolling mindlessly through short videos on a device, not staying on any one of them for more than a minute (or less). On the other hand, if you've ever binge-watched a show on Netflix, sat through a 2 hour movie or read a book to a toddler over and over again, you have evidence that attention spans aren't a lost cause at all. So what gives?

What's going on?

So have attention spans gotten shorter? The answer is that our total attention span, across all contexts, can't be measured in a one-shot deal. Looking at a Word document (and then looking away) just isn't like playing a board game or doing safety training or watching a movie (fun fact—the average length of Hollywood movies over the last 40 years has actually gone up, not down). So when researchers make big generalizing statements about any one of these, it should be taken with a very large grain of salt.

Are there more distractions than there were just 10 or 15 years ago? For sure. And has that made it harder to focus on things we're not that invested in (like Word docs or random internet videos)? Definitely. But that doesn't tell us much about what's going on in the context of safety training.

The truth is that attention is goal-oriented (and this is something that all those different researchers do actually agree on); the amount and depth of attention we pay to something depends on how clear the goal of it is, how desirable that goal is, and how engaging the process of getting there is. If your mind is locked into a movie for a solid 2 hours, it's probably because the story is engaging, it's well made and you're invested in seeing what happens to the hero. But if you're mindlessly scrolling through short videos of cats, it's because it's just not that engaging for more than a few seconds and you're not really invested in getting something out of it.

Similarly, if a driver is saying that training is taking too long and he wants something shorter, but that night he's sitting in his cab binge-watching a show for 4 hours straight, attention span isn't the problem.

If your drivers are looking at their phones while you're holding an in-class training event, it's probably not because humanity has suffered a critical failure in attention. It might just be that they're bored. That's not an attention-ability thing, it's a content, context and goal thing. You could tailor your material to be shorter and snappier, to grab whatever attention they are giving you before they look at their phone again, but all you're really doing is admitting that your material isn't engaging enough and the goal of it isn't ingrained enough in your people.

The takeaway

So what's the issue? While I don't think it's generally true that drivers want less training (in the same way that professional athletes understand the value of additional coaching and training to keep upping their game). In fact, according to the most recent Best Fleets to Drive For® driver survey, over 90% of respondents agreed or strongly agreed that ongoing training is important.

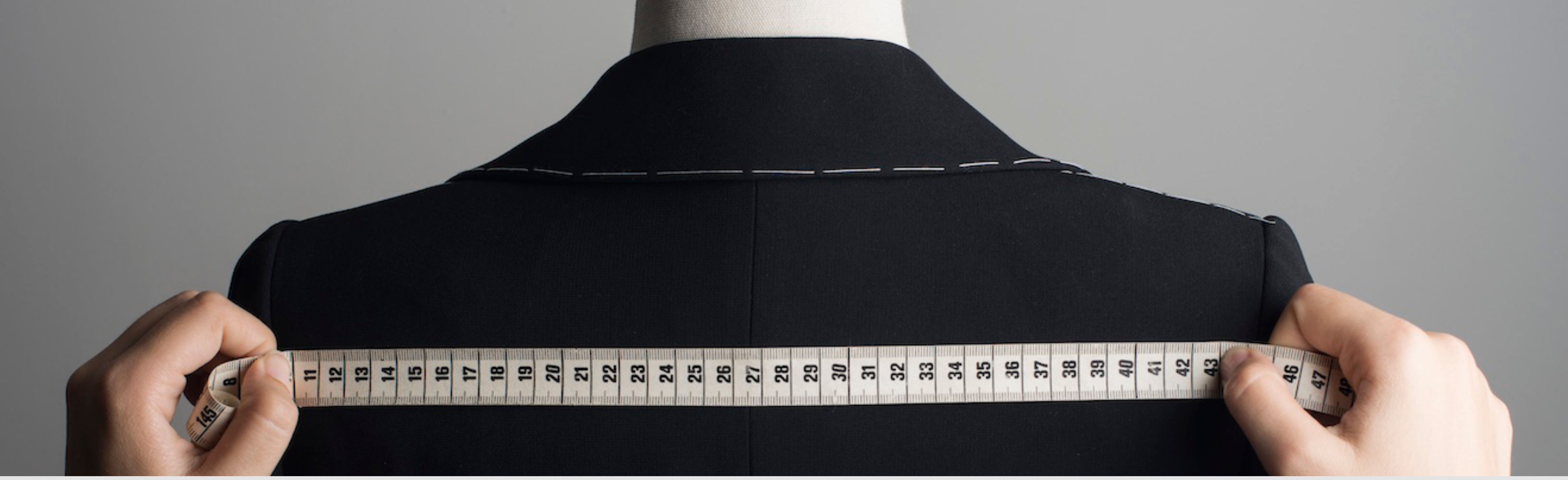
However, there can still be some legitimate barriers to getting driver buy-in, and reasons they might be asking for shorter training. For example:

- Pay
  If you are paying by the mile and then pulling your drivers off the road to do training, it's pretty easy to see why they would be reticent to do it or, at least, would want that training to be as short as possible. But there are lots of companies out there who have addressed this head-on with either bonuses or straight pay for training.

- Relevance
  If the training is thin, lacks relevance or is condescending, of course drivers will want less of it. Good training doesn't have to give the experience of an endless stream of tiktok videos, but it should push the learner to use different parts of their brain at various stages of the training. But keeping it fresh doesn't have to mean keeping it short.

- Clear goals
  Like watching a movie and being invested in seeing what happens at the end, or focusing on a board game because you want to win, the goal of the training should be clear and identifiable. Connecting the action of doing training to a larger, overall, value-laden goal of safety (one that extends across all of the driver's activities, not just during training), will solve the 'why am I doing this' problem. This is particularly critical because, as we've seen, attention is goal-directed. Make sure they know what the goal is.

If drivers are asking for shorter training, it's probably less helpful to write that off as a function of a waning ability to pay attention to things. Instead, think about what else might be going on there—there's a good chance that the real issue is how locked in your drivers are to your training culture as a goal, and how timely, relevant and contextual the material is (and whether or not they are getting paid). Arguments that reduce training issues to a matter of society-level attention problems are a red herring, and those arguments are probably better left to sleep with the (gold)fishes.



Made to Measure: Tailoring Your Teaching for Different Learners

January 10, 2024

Whether you're teaching in person or through an online platform, there are two big questions you need to think about (and a whole lot of smaller ones, too). The first is what you are going to teach—the specific content you want your learners to engage with. And while we've covered that in , Crafting Effective Online Training: Expert Insights and a webinar, the other, equally important question is how you want your learners to engage with the material. In a recent webinar, Communications Specialist Rick Duchalski sat down with CarriersEdge CEO Jane Jazrawy to dispel some of the misconceptions people have about learning in general, to talk about tailoring your teaching to meet your learners' needs, and also emphasize the one (not so) secret ingredient that your program absolutely must have.

Misconception #1: Learning styles

When the idea of formal learning styles first came about, the idea was that people had specific ways they could and couldn't learn (visual, auditory, etc.)—and that each person needed to be taught in the way that was appropriate for them. While later research showed that this was not the case (and that any one person can learn in a bunch of different ways), a lot of people still believe in them. "But the reality is that they're better understood as guideposts for learning," rather than something people are locked into, says Jazrawy. People may prefer to learn in certain ways (or maybe their brain works differently), but none of that means a person is limited to just one type of learning approach.

Still, you should try to teach in as many different ways as possible in order to catch a wide range of those preferences. When it comes to building online content, it should be presented in ways that let people see it, hear it, respond to it, and more. Even if you're not hitting every single style every time, that can be okay—just because a person likes to learn in one way doesn't mean they can't learn in another. But by working in a variety of strategies, it'll be accessible to more people.

> *The material has to be quality content—not just a gloss of common knowledge or repetition of the regulations, but a deep dive into the kind of things drivers actually need to learn about.*

Misconception #2: "In my day…"

The flip side of believing that people have non-negotiable, hard and fast learning styles is the belief that how the instructor learned the material years ago is just how it should be taught now. "Training," as Jazrawy says "is an art, not a science." And a big part of that art is being open to switching up your style if you see that your students (whether it's all of them or just some of them) aren't getting it. And responding to those signals means paying attention not just to whether they are getting questions right, but also to more subtle cues.

When you're delivering in-person content, pay attention to what the students are saying, but also what they're not saying—non-verbal cues like body posture, distractedness and more could signal that the content isn't landing like you intended. A good instructor will be tuned into those cues, so be ready to change your approach to get the students back on track.

That may seem like it's difficult to do with online content, but there's still a way to do it. By building in knowledge checkpoints, mini quizzes and more in-depth assessments—as well as surveying your learners—you can get a sense of how well the material is being processed and how happy your students are with the program.

And any good training program will use a blend of online and in-person, which means that you'll have a chance to follow up with students face-to-face, to make sure the online material is landing.

Misconception #3: My drivers only want short videos

There's a strange myth that floats around the industry about how drivers like to learn online—'they've gotta be short videos, that's all they'll tolerate'. And while some people have probably felt that way at some point, the reality is that this feeling is a response to something: bad content. In particular, long, drawn-out material that the driver has to sit through with no sense of how long it's going to take, what they are supposed to learn and when it's going to be done.

Whether in person or online, good material needs to have signposts built-in—signals that tell the student how long it's expected to take, what the learning objectives are, and checkpoints to remind them how far they've come and how much there is to go. If you can do that, you'll find that your learners are more tuned in and more willing to go on a longer journey with you because they aren't spending valuable mental resources wondering how much energy they need to save up so they can make it to the end.

The not-so-secret ingredient

There's a fourth point that may seem a little obvious, but its value can't be overstated: the material has to be quality content—not just a gloss of common knowledge or repetition of the regulations, but a deep dive into the kind of things drivers actually need to learn about.

For all of the concerns over learning styles, building in signposts and meeting objectives (as well as being sensitive to student engagement), the thing that will render them all meaningless is if the content stinks. And although it applies to in-person training, it's especially true of the online experience: "People get distracted by all sorts of bells and whistles in online training, but the most fundamental question you should ask is whether or not it's good, quality content," warns Jazrawy. And if the quality isn't there, none of the rest of it matters.

But if it is, your training program (including both online and in-person components) can boost your drivers' skills if it can (a) address different learning strategies, (b) meet learner expectations with appropriate signposts throughout, and (c) include follow-up practical training to make sure the learning sticks.

CarriersEdge is a leading provider of online driver training for the trucking industry. With a comprehensive library of safety and compliance courses, supported by advanced management and reporting functions, CarriersEdge helps over 2000 fleets train their drivers without sacrificing miles or requiring people to come in on weekends.

CarriersEdge is also the creator of the Best Fleets to Drive For program, an annual evaluation of the best workplaces in the North American trucking industry.