



**CARGAS<sup>®</sup>**

# 15 THINGS EVERY FUEL MARKETER SHOULD DO BEFORE SUMMER ENDS

2021 SUMMER CHECKLIST

# CONTENTS

INTRODUCTION.....	1
PREP FOR YOUR CUSTOMERS.....	2
PREP FOR YOUR BUSINESS & TEAM.....	3
PREP FOR YOUR EQUIPMENT & FLEET.....	4
PREP FOR YOUR SOFTWARE.....	5



# INTRODUCTION

A successful heating season starts with good preparation during the summer months. Now's a good time to evaluate whether you've done everything necessary to support your business during the busy season. Here's a list of best practices and tips to guide you and your team as you make the transition from summer to winter.



# PREP FOR YOUR CUSTOMERS

**Complete pricing plan signup.** Encourage your customers to sign up for pricing plans now so everything is in place by the time you start your winter deliveries. This is also the time to complete budget plan renewals.



**TIP:** Do an audit of customer pricing. It might make sense for some customers to change pricing plans based on their usage. Now's the time to uncover that information and make recommendations.

**Focus on collections.** Use this time to collect any outstanding balances so you're caught up by winter and have as much working capital on hand as possible.

**Reach out to will call customers.** Send some targeted messages to your will call customers encouraging them to switch to automatic deliveries. You may want to consider incentives, switcher programs, or other offerings to get them converted before winter.



# PREP FOR YOUR BUSINESS & TEAM

**Evaluate your reserves.** As you're calculating and purchasing the fuel you need for the season, think about your reserves. Does it make sense to have a little extra in your reserves this year, or do you plan to run a little leaner?

**Summer or fall fills.** To help even out winter demand, consider summer or fall fills where it makes sense. Pull ahead based on K-factor and tank size, so you can schedule optimal drops for certain customers early in the fall.

**Cross-train your team.** Do you have coverage if one of your team members is out during the winter? Cross-training employees with similar roles, like a service dispatcher and a delivery dispatcher, helps you prepare for an emergency situation.

**Create an onboarding plan for seasonal employees.** Don't reinvent the wheel every year when you bring on seasonal employees. Create a process for onboarding seasonal employees and document it so it's ready for you to use every year.

**Review your processes.** Before you have a flurry of deliveries to manage, consider what went well and what didn't last year. Step through your main business processes and look for areas where you might be able to make improvements or gain efficiencies.



# PREP FOR YOUR EQUIPMENT & FLEET

**Equipment maintenance.** For companies with HVAC departments, encourage your service customers to schedule maintenance for their heating appliances before it gets cold. For fuel dealers, it's time for tank monitor maintenance, tank swaps, and tank painting.



**TIP:** If your list of service-related tasks becomes unmanageable during the summer months, consider overhauling your dispatch board. Creating categories or filters to help you view one type of job at a time or to separate out customer service work from your maintenance tasks can keep your team efficient and organized.

**Create a truck maintenance schedule.** Nothing is worse than when a delivery truck goes down unexpectedly during your busiest time. Create a preventative maintenance schedule that works with your seasonal demand to keep each truck up and running.



**TIP:** Depending on the size of your fleet, it may be worth investing in fleet maintenance software to manage your maintenance schedule during the winter and all year round.



# PREP FOR YOUR SOFTWARE

**Recalibrate your forecasting models.** For optimal deliveries, it's crucial that you're forecasting accurately. Take the time to review delivery exception reports and weather projections to dial in your K-factors for this year.

**Review and update reports.** What metrics do you like to look at to evaluate your performance during the heating season? Take the time to revise or build your reports now so they're ready to go by the time you need to use them.

**Move your credit applications online.** Eliminate the manual work of managing hundreds or thousands of credit applications on paper. A small investment in e-signature software makes the process quick and easy for you and your team.

**Purchase or evaluate a customer portal.** Online and mobile resources for your customers have become critical investments for fuel marketers. If you don't already have a customer portal, now's the time to purchase one or to evaluate your options so you can install one next summer.

**Evaluate new tools.** Are there other tools you'd like to consider for your business? Use this time to explore and implement new systems to support your team and your customers. Do tank monitors make sense for you? Do you need better ways to communicate with your customers? Develop a technology roadmap and use the summer months to implement it.



# ABOUT CARGAS

Cargas is an employee-owned software company with more than 150 employees. Cargas is the creator and provider of Cargas Energy, leading software for fuel delivery and HVAC service companies. With tools for fuel delivery, customer service, HVAC service, and cylinder exchange operations, Cargas Energy helps fuel dealers do more with the resources they already have so they can grow their businesses.

Through its unique employee-owned culture, Cargas fosters a commitment to excellence, a dedication to teamwork, and a high level of customer care. Established in 1988, Cargas has continuously been recognized as a Best Place to Work.



101 North Queen Street, Suite 300, Lancaster, PA 17603

1.888.611.3138

[info@cargasenergy.com](mailto:info@cargasenergy.com)

[cargasenergy.com](http://cargasenergy.com)

