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Expert Witness & Fleet Consultant / Author of Fleet & Truck Operation, Maintenance & Safety Articles & Manuals / Former Director & Manager of Fleet Operations

**Maintenance / Asset Management / B2B / Cost Control / Safety / P. & L. / Bid Pricing / Negotiations
 Logistics / Multi-Site Operations / HAZMAT / Equipment Redesign and Modification / Risk Management
 / Established & Managed Contractual Obligations of Numerous Major & Sub Contractors**

Key Accomplishments:

Published Author, Expert Witness, Fleet Consultant, Director of Fleet Management, Managing Partner of start-up truck equipment manufacturer, direct report to COO of multi-Billion-dollar SEC traded company, direct report to sr. V.P. of multi-Billion-dollar privately owned company. Direct report to the Presidents of two additional truck equipment companies.

Managed all activities of contract maintenance companies. Consolidated 12 maintenance providers to one. Negotiated two exclusive three year term maintenance contracts first with Penske - \$13+ million annually, then Ryder - \$14.5+ million annually. Saved over \$3,000,000 on first contract (Penske).

Designed and implemented the use of a breakdown / uptime report while at SWS. Made contract maintenance providers report weekly using this format. Chaired weekly telephone conference calls using this format to increase enterprise fleet uptime to 92% to 95% on a weekly basis. Uptime had previously been in the 70 – 74 percentile range. Key individual in the development of this becoming all electronic system when the switch from Penske to Ryder was made.

Established Maintenance Standards on an Enterprise-wide basis. Created and established the maintenance standards and schedules for Heritage Propane / Heritage Operating (both MLP's). Did the same for Southern Wine & Spirits. Had key account maintenance expert from both Penske & Ryder assigned to me. This resulted in dramatically increased OTR safety and uptime! Created and performed District and Regional Fleet Safety Audits.

Initiated System of and Chaired annual fleet review meetings at each distribution center (35+ states). Reviewed costs and operational safety and efficiency with senior state or district management at each DC in conjunction with national and local representatives of contract maintainer as meeting participants. Chaired driver education and training meetings at each of these locations at the same time.

Rewrote the safety manual at SWS. Introduced enhanced safety and operational procedures at the district, regional level and enterprise levels. I am an expert in OSHA (for the transportation industry), DOT, FMCSA, FMVSS and ASME regulations for various types of vocational vehicles.

Managed the integration to the existing fleet of 256 acquisitions that more than doubled fleet size during my time with Heritage.

Initiated bulk tank remanufacturing to increase Heritage fleet capacity by 16.6% and cut costs.

Bulk tanks deemed too small were scrapped after a 10-12-year cycle. Investigated reuse of high-quality tanks and introduced larger capacity upgrades. Negotiated with OEM tank builders and developed process to recycle and reuse tanks. Developed and spec'ed cost effective chassis to carry larger tanks. Fielded remanufactured tanks at half the cost of a new tank. A \$1.6 million savings resulted in 18 months. This was a significant factor in reducing on highway risk – the delivery fleet stayed the same size over a 6-year period while gallons delivered doubled. Maintenance costs were reduced drastically.

Removed chassis deadweight to triple Heritage fleet fuel mileage. Trucks were built with steel components adding excess weight. Wrote specifications to include aluminum for fuel tanks, deck, and fenders. Redesigned deck and fenders to reduce weight and improve vehicle tire air circulation extending tire life and increased safety. Lowered bulk delivery truck weight by 3.5% to 4%. Eliminated bi-fuel engines and purchased higher torque diesel engines. Fleet MPG increased over time from 2 mpg to 6+ mpg per truck. Risk was reduced because new trucks increased drops per day from 20 to 30-32 due to new power train combinations. This was another key factor in keeping the delivery fleet the same size as gallons delivered continued to increase through organic and acquisition driven growth. This produced a safer fleet.

Designed Heritage truck specifications that doubled gallons of product delivered at no additional cost. Trucks were under performing in all terrain conditions, especially in hilly and mountainous areas. Wrote new truck performance specifications that greatly increased not only performance but safety as well. Had shift points analyzed by computer and fixed variants with the optimum of fuel economy and route efficiency. Developed truck specifications to maximize fuel mileage in flat (basic spec), hilly (intermediate) and mountainous (mountain) terrain. Truck changes increased load capacities 20% or more and performance by 33% to 100%. Safety was enhanced by increasing the gallons delivered without increasing the number of trucks operating daily.

Created Numerous Civilian and Military Specifications. These specifications were, Terrain, Climate, and Mission specific. Built prototypes/proof of concept recovery vehicles (mounted on civilian and tactical chassis) for the Canadian Armed Forces, U.S. Army, and the United States Marine Corps. Demonstrated these vehicles at Camp Borden, Camp Petawawa, LETE, Aberdeen, Quantico, and the NATC. Thousands of these vehicles are currently in active inventory with the U.S. Army, and the Canadian Armed Forces and were combat proven in the Iraq and Afghanistan conflicts and other operations.

Negotiated to eliminate unexpected new truck delivery costs, saving Heritage over \$750K. Order for over 120 vehicles had over 100 to be built. The units awaiting manufacture were impacted by large increase in engine cost due to new emission mandate. Increase was effective immediately with no notice to dealers or end users. Negotiated with engine manufacturer for immediate availability of 110 engines. Secured storage on site at the truck manufacturer and build schedule to meet original delivery dates. Cost increases only impacted the final 10 units.

Negotiated numerous chassis and equipment contracts (annual basis) at 30% to 35% less than retail while establishing enhanced performance, efficiency, and safety standards enterprise wide.

Negotiated numerous extended chassis & equipment warranties. 5 to 8 years in length, and mileage to 300,000 miles. 2-3 times the normal warranty for medium duty trucks. This resulted in the fleet being maintained in OEM shops, not 3rd party. The repairs were then made with original OEM parts not aftermarket. Quality of repairs, Reliability, Maintainability, Availability, and Safety all increased as a result. Downtime decreased dramatically.

Cut Fleet Cap Ex by 1/3 in the first 18 months at Heritage. Responsible for spending from 15% to over 22% of total capital expenditures annually - \$12,000,000 to over \$25,000,000 annually.

Introduced Telematics to both Heritage/Energy Transfer and Southern Wine and Spirits. This resulted in increased efficiency and route optimization which increased profits, safety and reduced accidents and enhanced risk management.

Risk Management. Created & Presented Driver and operational training (Operational, EPA, Safety, and FMCSA – CFR) at the individual, group, district, regional, and enterprise levels at both Heritage/Energy Transfer & SWS (now Southern Glazer's). Reviewed and actioned R/O's for OEM recalls. Commissioned assessment & appraisals of damaged units, authorized work orders to repair & replace components based on estimated repair costs (I was both directly involved and established preferred contractor/providers for this purpose) at both Heritage/Energy Transfer & SWS. Performed analysis of all accidents - serious, catastrophic, and those involving fatalities (retrieved, reviewed and analyzed data to make our operations safer, and limit our liability exposure). Authored policies and procedures for regional V.P.'s to implement and follow specifically tailored to their region with respect of personnel, terrain, climate and operational mission. Created and implemented a chassis and trailer audit (including the form that would give the district or state fleet in question a rating.) that I used and shared with division management to give them a snapshot of their fleet, what needed to be repaired, improved, and/or replaced.

PROFESSIONAL HISTORY

PUBLISHED AUTHOR

2017- Present

Authored numerous articles that have been published primarily in Business Fleet, Work Truck, and Heavy-Duty Trucking print & online magazines.

Considered to be a subject matter expert on truck industry in general and fleet operations and maintenance.

SMART FLEET MANAGEMENT LLC.

2017 - Present

Work as a contract fleet consultant/SME, expert witness & entrepreneur to assist senior management, ownership, and private equity as a consultant/expert witness with legal cases and fleet/risk management. Retained as an expert in more than 45 cases (please refer to casework document) beginning in July, 2018. Beneficial outcomes have been obtained in most of these cases. Most have concluded some are still ongoing. I am engaged for new cases on an ongoing basis.

Project phases for fleet consultation as shown below:

Project Phases**Analysis / Due Diligence Phase**

- Analyze, existing small and medium fleet operations (up to 6,000 vehicles).
- Do due diligence on operations, safety, compliance, specifications, procurement, training, maintenance, & risk management.

Reporting Phase

- Having done the due diligence, report recommended improvements in:
 - Operations.
 - Maintenance.
 - Safety & Compliance.
 - Procurement & Vehicle/Variant Specifications.
 - Fleet Plan.
 - Driver & operations personnel training.
 - Risk Management.
 - Advise on Fleet Department Startup & Ongoing Improvements.

Execution Phase

- Implement agreed upon project action segments and coach your team to administer the programs that result from the project.

SOUTHERN WINE & SPIRITS, Miramar FL.**2008 - 2015****Fleet Operations Manager**

Established a fleet department system, operations support and program management startup.

Wrote Truck & Equipment Specs, Initiated RFP process, negotiated results and selected key vendors.

Saved \$7,800 per truck chassis through bid process and negotiations for 2009 procurement.

Revised & implemented box truck, cooler, and reefer specifications. Initiated box, cooler and reefer manufacturing with new suppliers.

Renegotiated OEM concessions on an annual basis using an RFP process when necessary.

Negotiated new deals each year with chassis vendors.

Established captive dealers.

Negotiated new maintenance contract through RFP process -Savings in excess of \$1.3 million per year.

Modernized delivery fleet – right sizing fleet.

Disposed of older vehicles through bidding of newly established bid group and through auctions.

Worked through fielding of 2010 EPA emissions compliant trucks and tractors.

Developed and implementing driver training nationwide.

Competed bodies through RFP process. Saved \$750 to \$1,500 per unit depending upon specification.

Fielded new fleets in 90-day time frame for two new state operations.

Negotiated new reefer deal with alternate manufacturer (Carrier).

Transferred all my contact network to my then employer.

HERITAGE PROPANE, Tulsa, OK & Florence, KY**2001-2008****Fleet Manager / Director of Fleet Management**

Managed all fleet activities for the 21st-24th largest private vocational fleet in the U.S.A. –

Approximately 2,500 vehicles initially growing to over 5,500 vehicles (5,175 trucks).

- Procurement/Fielding on a timely basis
- Operational efficiency – specification development/evolution

- Worked through fielding during 2 new EPA mandates & introduced other regulatory compliance initiatives.
- Implemented maintenance schedules and improvements as a positive change agent
- Disposed of hundreds of units per year at a profit. Implemented internet sales.

Modernized delivery fleet resulting in zero truck growth while gallons delivered increased from 175 million gal. to 420 million gal. prior to Titan acquisition.

Titan acquisition immediately increased gallons delivered to over 625 million.

Modernized crane truck fleet. Bought directly from the OEM's eliminating the dealer markups of up to 35%.

Established terrain and job/district specific specifications. This resulted in zero growth in bobtail fleet over five years while the company more than doubled in size.

Introduced automatic transmissions & many additional innovations to the industry. These innovations more than doubled MPG.

Introduced GPS and Histogram usage for route and driver management & improved risk management.

Created & Introduced standardized maintenance procedures.

Enhanced safety of operations & equipment.

AUTO CRANE COMPANY, Tulsa, OK

1998 - 2001

National Accounts Manager

Increased sales in FY 1999 and 2000 by over 20% each year.

10% under budget in FY 1999, and 18% under budget in FY 2000.

Developed new accounts, revived old accounts, established new OEM accounts.

LABRIE, QUEBEC CITY, QUE. CANADA

1997 - 1998

Southeast Region Manager

Recruited by Labrie's president to establish distributors in new territory and assist in the establishment of new U.S. facility.

Responsible for sales, parts and warranty throughout the region. Established region as top performer in the company.

Formulated and executed a plan for the recovery of a sizeable debt from a non-performing distributor and turned them into the company's top distributor.

AMERICAN HOOK LIFT, INC., New Albany, MS

1992 - 1996

President/Founder

Founded partnership through innovative investor recruitment after receiving bank commitment for SBA loan. Took company from start up to \$3,000,000 in annual sales in four years.

Rented and tooled plant. Hired personnel and had first completed unit out in 6 weeks from start up.

Developed and trained domestic distributor network (to 50+ in four years).

Established export sales to Mexico, South America, and Pacific Rim.

VULCAN EQUIPMENT COMPANY

1986 - 1992

Division Manager, Olive Branch, MS

Sales Manager, Toronto, Ontario, Canada

Team leader contributed to achieving over 40% annual growth for five straight years.

Mentored subordinates in two divisions to take over division management. (Export & Vulcap)
Direct OEM sales to rubber companies as Vulcap division manager.

Founded Military Division.

Responsible for all aspects of a successful contract award: Designed winning RFP. Responsible for the military team which included RFP responses to four prime contractors, writing the winning bid taking the design package from concept, through prototypes, testing and evaluation, to production, proving to the industrial benefits office of the Government of Canada that Vulcan had the best recovery unit proposal, QA-QC, final inspection and successful fielding.

Won and negotiated \$ 15 million contract with prime contractor (OEM's – U.T.D.C. & Steyer).

Negotiated engineering add on for an additional \$3.9 million.

Created Export Division - Increased sales by a 12 multiple in one year. Handled all sales payments through letter of credit.

Directed loading and Intermodal shipment of all export sales to overseas destinations from four plants (in Cda. and U.S.) – plants were not equipped with rail sidings. Movements were a combination of truck, rail and marine utilizing containers. Negotiated special tariffs for both rail and marine.

Created MLS Division and established distributor network. Engineered product line completely in house with existing resources.

ATLAS 2000 INC., Montreal, Quebec, Canada

1978 - 1986

General Sales and Marketing Manager

Directed sales and marketing world-wide. Company liaison with Caterpillar, Inc.

Successfully supported activities of over 100 Caterpillar dealers for off highway products sold through them.

Developed and controlled activities of on-highway equipment distributors. (Separate product line).

Hired and trained sales force.

Traffic Supervisor – Traffic Manager

1970 – 1976

Directed all Intermodal bulk shipments from 2 industrial plants – one in Montreal, one in Cornwall, Ontario worldwide. Both plants equipped with rail sidings. Shipments were made via truck, rail, and marine (including barge).

Directed specialized loading and blocking of dimensional rail shipments, and controlled car movements all across North America – to ports and mining/construction sites.

Grew to become the largest dimensional load rail shipper in Eastern Canada. Negotiated special rail and marine tariffs.

Directed the activities of in-house private truck fleet of three tractor trailers & two tandem axle straight trucks. Hired and trained drivers. Delivered product as far west as B.C., Canada, and as far south as Allentown, PA; and Port Authority of New York for shipment to major construction and mining operations around the world.

J. & S Driveways

1971-1980

Owned and operated a driveaway service as well as a medium and heavy towing service. The driveaway service assembled two and three ways which were delivered from the Kenworth plant (Sicard at that time) in Ste Therese all across Canada to their dealers and various upfitters. We also delivered hundreds of trucks over the years from Atlas to the N.Y. harbor for Mack Trucks for shipment overseas. The wreckers mainly worked in a 200- 250-mile radius of Montreal. J. & S. was the main towing contractor Glengarry Transport, Reimer Express and others.

SPECIAL ACTIVITIES

Member - National Association of Fleet Administrators

Member - National Truck Equipment Association

Former Member - Association of the U.S. Army

Valid Class B Commercial Driver's License held for 45 years. (Relinquished due to adult-onset diabetes in 2016).

Former Member - Amerigas Specification Committee

Former holder of "Secret" Security Clearance, Canada/NATO

Former Member - ANSI (American National Safety Institute)/Wastec –

Member of the Ford Motor Company - Super Duty Advisory Group - 2005 to 2008

Attended Michelin Fleet Manager 3-day Seminar at Michelin Proving Grounds, Greensboro, S.C. in 2004 as an invitee. Of special interest were subjects such as stopping distance both wet and dry with tractor trailers fitted with tread types and tire brands, tread types tested with thermocouples under load, tire failures (in excess of 30 types), Passenger in retired Nascar Driver piloted vehicles doing 360-degree continuous laps on a hosed down concrete circle with speeds approaching 55 mph.

Attended Allison Two Day Ride & Drive event at NATC (National Automotive Test Center) located in the desert approximately 45 minutes from Carson City, NV. www.natc-ht.com

Attended as an invitee numerous Ford Fleet Previews 2002-2014.

Attended Daimler Chrysler Fleet Previews 2003-2006.

Attended Caterpillar Acert Engine seminar in Phoenix, AZ. in 2009.

Attended and participated in U.S.M.C. testing at the N.A.T.C. & Quantico in 1989.

Attended and supervised various tests and demonstrations at the Canadian Armed Forces LETE (Land Engineering Test Establishment) near Ottawa, Ont. Canada.

Supervised a demonstration (adhering to the tasks laid out by the HLVW engineering officer) of the Vulcan 940 heavy duty wrecker at Camp Borden, Ont. Canada.

Rode in the HLVW over the RAMD course at the Canadian Armed Forces - Camp Petawawa, Ontario, Canada. Observed RAMD testing. Commissioned and presented a structural failure analysis of the truck frame, the wrecker as a whole and the major components during testing of the prototypes.

Demonstrated the Vulcan 940 wrecker at the U.S. Army base in Aberdeen, MD.

Demonstrated the Vulcan 940 wrecker at the U.S.M.C. base in Quantico, VA.

Attended the U.S. Army Tactical Wheeled Vehicle Conference, Monterey, CA. each year from 1986 to 1991.

Attended the U.S. Army Armor Conference in Fort Knox, KY. in 1987 to 1989. Security clearance required.

Demonstrated the Atlas RD-150 at the Caterpillar Proving Grounds in Buckeye, AZ for three years at the invitation of Caterpillar during their Mining Seminar (starting in 1982) pulled by the Cat 776 tractor. The annual seminar was moved to Farmington & the UTAH Coal Mine on the Navaho Reservation near Farmington, N.M. in 1985. I attended in 1986 as well.

Negotiated with Komatsu headquarters staff of various responsibilities at their corporate headquarters in Tokyo, Japan to approve the use of the RD-150 with their 75-ton truck modified by Atlas with a

hitch and other components to function as a tractor. Approval was given as a result of these negotiations.

PUBLISHED ARTICLES

The Hauler; December 1982, “Close Up”

American Waste Digest; 1993 “Business of the Month”

Trailer Body Builders; 1992 “Corporate Profile”

Public Works; 1992 “County Stretches Fleet Budget with Hook Lift Hoists”

Business Fleet – Articles published. Some of the articles below were also published in Work Truck & Heavy-Duty Trucking magazines. Online and in print.

1. How to Avoid Aggravation During a DOT Surprise Inspection. Aug 3/17
2. How to Get Your Vehicles Winter Ready – Sept 14/17
3. ELD Compliance for Small Fleets – Sept. 14/17
4. Are Your Drivers Pencil Whipping Their DVIR’s? Oct. 5/17
5. ELD Compliance – What Now? – Nov. 27/17
6. Tire Maintenance: It’s Not Just Checking Tire Pressure. Nov 27/17
7. How to Plan for the Surge in Truck Demand – Jan. 11/18
8. Understanding Fleet Metrics – What is Your Fleet Telling You? – Feb. 1/18
9. How to Defend Your Fleet Budget to Senior Management. May 18/18
10. Thinking About Bringing Maintenance In-House? Think Again. June 12/18
11. How Not to Hate Your Diesel Particulate Filter July5/18
12. Can’t Find Qualified Drivers? You have Options. July 10/18
13. Are You Loading Your Box Trucks Safely? 11/23/18

<https://www.businessfleet.com/319131/are-you-loading-your-box-trucks-safely>

EDUCATION

3 years of study completed towards BS. Concordia University, Montreal Quebec