SmartWay Webinar Series: SmartWay Truck Tool--Advanced Class: Getting the Most out of Your SmartWay Participation
February 10, 2016

<indicates insertions not originally in transcript>

Cover Slide – Matthew Payne, EPA
Thank you everyone for attending today. I know your time is valuable. We are going to do our best to make sure that this is a very full hour of SmartWay information for you.

Covered Today
What we're going to cover today is just a really quick background.
Then I want to dive into how SmartWay rankings are actually done, how shippers are using the data, and how to understand your data reports. If you're filling out a SmartWay tool, you might as well use those data reports. They can be very helpful. I'll give you some points to remember when filling out your tool. I'll go over very quickly what's new this year, and then I'll try to, as much as we have time possible, to get into the truck tool demonstration and do a deeper dive especially of some of our newer features.

Background
As background, SmartWay was initiated in 2001. The important part about this slide is the cooperative nature that we developed this program. SmartWay's been around since 2001. A lot of voluntary programs don't have that sort of longevity. ENERGY STAR® is one, SmartWay is another. There are two main reasons why this has happened.

The first is because we developed this in a cooperative manner with industry. We sat down with some really big leaders of industry; Dave Berry of Swift and Mike Kelley of YRCW and Mitch Jackson of FedEx and many other knowledgeable people helped design this program, so that's why it's resonated with industry.

The other thing is we have a heavy emphasis on customer service. Our partner account managers are top-notch. They have higher industry experience and they are really geared towards answering your questions. We get good customer service ratings. It's part of what we need to do. We treat it like any private business because it's voluntary. If we don't have happy customers, we don't exist, so that is part of why SmartWay is around after all these years.

Why Participate?
Why participate? It's a really simple equation. You save fuel, you save money, and that reduces carbon dioxide that you put into the atmosphere. So it's good for carriers, it's good for national security, and it's good for the environment.

SmartWay is an Integrated System
SmartWay is an integrated system. We now have SmartWay Canada, which is almost an exact duplicate of the U.S. program, except that you can look at things in French and metric. We'll be working with the Mexican government here shortly to develop a complete North American

supply chain accounting system. We're covering most of the major modes. We're going to be looking at including ocean-going vessels here very shortly. And that should complete all of the lengths of supply chain, so we'll be able to cover all shipping modes.

There's the shipper tool. Previously we haven't really shown carriers much of what's actually in the shipper tool. We're going to do that during this presentation, because I think it will tell you a lot to help your understanding of why we're asking for what we're doing, how we're ranking, etc. We're going to get into that in detail.

SmartWay Rankings

Now, the first category of things I want to talk about is the SmartWay rankings. Carriers may ask, "Why does SmartWay have rankings?" The number one reason is so that we can provide a standardized measure for carriers to understand how they're doing compared to their peers. You want to be able to benchmark, because you need to have that benchmarking capability to know where you stand and how to improve. It also provides shippers with standardized data, because more and more shippers are needing to get this information from their carriers. Without SmartWay there could be dozens of shippers calling up a single carrier asking for that information over and over again. So we do feel we are providing a good service to carriers by being that go-to place for shippers to get that information.

Now, the first place when you think of ranking--you want to think of your SmartWay category, and this is how you define yourself in the SmartWay tool. The question I put in here: you can't <why would you> compare the Denver Broncos with the Kansas City Royals. It's really an apples to apples, oranges to oranges comparison. Why would anyone want to compare a truckload dry van fleet with a flatbed fleet? You're either going to hire a flatbed, or you're going to need a truckload dry van. We want to compare similar things. The first step as you fill out your tool that you want to pay attention to is really to describe your fleet correctly, because you want to make sure that you're going to benchmark against your peers.

Truck Fleet Description

This gets into the truck fleet description, and you can see here as I will go through the tool. This is just a screen shot of the tool. You're going to identify your fleets, fleet details, etc. This is very important, because you want to create your fleets in the tool exactly how your customers hire you. I'll show you why this is important—the shipper tool. The shippers need to be able to find you to get your information into the shipper tool. If they can't find you, they get unhappy. Sometimes they call carriers, often they call us and say, "Hey, where's my carrier? They were in last year, they're not in this year. I can't find them." It could be for a number of reasons, so we want to make sure that you get that all in correctly.

Now, if your business is done through one company name, then you're going to have one fleet, but if you offer two different ways that your company can be hired, two separate business offerings, then you'd want to have two fleets. The example I list here is: if you have a truckload business and perhaps an expedited business— these are hired separately, you track information separately. So again, very important.

If you do have intermodal operations—and we understand more and more carriers are going intermodal—we define this: if more than 10% of your freight is moved by non-truck or non-controlled modes, meaning logistics or rail or some other format, then you'll need to look at the SmartWay multi-modal tool. If you're unsure at this point whether you should fill out a truck

tool or a multi-modal tool, you definitely want to contact your partner account manager. If you don't have a partner account manager, you want to call the SmartWay Helpline <734-214-4767> and we will do a deep dive into your operations and let you know which one you should do.

Truck Fleet Description
So your fleet description…In the SmartWay tool, the shippers have to list all the carriers they do business with. They do this by searching in the shipper tool for your information. Now, they can search by your company name, they can search by your address, by your SCAC, your MCN, your DOT Number; if you're in Canada, your NSC Code. If you make a mistake in your SCAC code and a shipper is searching for your company, that means they're not going to find you. They may try to search by MCN or they may try to search by your name. We try to provide as many ways as possible, but if a carrier does not fill out that information properly at the top, that you see in the fleet details screen, then it's going to cause problems later on.

What does a shipper tool look like?
<on screen: shipper tool "Input Carriers" tab> Here's where I'm going to share a look into an example shipper tool. As you can see up at the top, the areas that are highlighted on the shipper tool are input carriers, and there's a manual input of SmartWay carriers. Shippers are able to manually add carriers into their tool, or they can upload a data file containing their SmartWay carriers into their tool. If they upload a data file, it's even more important to have that information that I talked about on the previous screen correct, since it's an automated matching system.

You can see they can search through various filters. They can input a carrier name, they can look for the mode, they can sort it by ranking category, put in the SCAC, MCN, or DOT number, or they can actually search for all carriers that are in the state of Michigan, and they can apply that filter. What that's going to do is it's going to show all the carriers that meet that criteria. So if they say, "show me all flatbed carriers," all the flatbed carriers would show up here. Then they add that to their tool for future data entry by clicking on the company up above. Then they add selective carriers to the list below and that populates down here. So that's why all this information is very important.

Truck Fleet Description
<on screen: truck tool Fleet Description "Operation" and "Body Types" tabs> The next part of your truck fleet description is to characterize your fleets by operation and body type. This is the primary way we sort to make sure we have an apples to apples, oranges to oranges, or LTL to LTL-type comparison. We're going to characterize your fleet based on how you fill out the operational and body type description. Note, you need to be at least 75% concentrated in an operational or body type to be categorized as something other than a mixed fleet. So if you're a little bit of everything, you'll be categorized as a mixed fleet.

What if I'm Mixed???
The next question is, well what if I'm mixed? Well a mixed fleet isn't bad, it just makes it a bit more difficult to benchmark because mixed fleets have broader variation in terms of their performance. For example, the mixed fleet could be predominantly heavy haul with a little bit of flatbed, or could be 50% moving, 50% auto-carrier, or it could be a little bit of truckload, a little bit of LTL, a little bit of expedited, it could be a lot of different things. And that just means that the performance of companies that fall into the mixed category will be a bit wider, so the information won't be quite as specific. You'll just be compared against other mixed fleets, as

opposed to being compared against, say (for example) you are a truckload dry van knowing you'll be compared against all other truckload dry vans. Again, you need to be at that 75% threshold to be placed into any particular category.

Truck Fleet Description
Now in the tool there's a page that we added last year, called SmartWay Category, where we actually tell you how you're going to be categorized based on the information that you previously filled out. We have our 2016 SmartWay truck categories displayed down below. *<on screen: color-coded table of truck carrier categories>* If your dray operation outweighs all the different body types, *<you're categorized as dray>*; if you're flatbed, you're categorized as flatbed, whether you're truckload, expedited, LTL, or package. We're trying to compare similar companies, and the concept here is that we're looking at the dominant thing that defines the performance for these different categories. Tankers have very specific operational categories. They're generally going out full, coming back empty, or vice versa. They're not full both times. Everything has their own particular characteristics, and we want to compare you with your peers.

Now What?
Next question: now what? Okay, I have my peer group, but what is compared within my peer group? What is the information I put into the tool used for? So in the tool you'll see that you put in a lot of information from miles traveled, fuel used, average payload, the model year of your vehicles, etc. You may ask, well what is shared with the public? None of the primary data you input into the tool is shared. All that information we treat as sensitive business information, that does not go outside of SmartWay. We don't even share that with other parts of EPA. We treat it as very important information that we want to keep within SmartWay. What we do share is: we take the data that you've input, and we create six performance metrics that are going to be used to describe your fleet.

SmartWay's 6 Public Emission Metrics
<on screen: graphics and table of emissions metrics> Now these six performance metrics are in terms of gram per mile and gram per ton-mile for the pollutants of CO_2, NOx, and PM. Down below I've tried to give a shorthand of what gram per mile is, what a gram per ton-mile is, as well as CO_2, NOx, and PM. Generally, I don't like doing heavy PowerPoint slides. I prefer to be able to talk through issues, but because this is being recorded and these slides are going to be up, I erred on the side of more information on this slide. So you can look at these and you can read quicker than I can speak--what exactly a gram per mile and a gram per ton-mile is.

CO_2, of course, deals with global warming, a surrogate for fuel efficiency. So you reduce your CO_2, you improve your fuel efficiency, essentially. NOx and PM, that's smog and soot, that's a concern for drivers and people living near heavy truck traffic.

Gram per mile is the amount of pollution for every mile traveled, and then gram per ton-mile adds in the weight metric, the weight component. In general, for most applications, the gram per ton-mile is going to be probably the more descriptive metric.

SmartWay's 6 Public Emission Metrics
<on screen: table of strengths/weaknesses of using particular emissions metrics> This leads into the question, which metric is best for my company? The answer, of course--like most answers—

is: it depends really on what you're trying to measure. So I tried to write down some of the strengths and weaknesses of the different metrics.

You notice we have a gram per volume mile down here. That shows up in your tool, but it does not show up on any of the public information, just the gram per mile and gram per ton-mile at this point. And again, you can read the strengths and weaknesses, but grams per mile--if you know your miles and fuel this will be a good metric for you if your payload weight approaches the national average or if you have very light payload. The weakness, of course, of gram per mile is that it doesn't account for the work done. Of course an empty truck is going to have better mpg than a full truck, and so your gram per mile is going to look better with an empty truck. Now that, as an efficiency metric in and of itself, doesn't make a whole lot of sense, because you want to haul freight and therefore the ton-mile will factor into your average payload. But there's some issues with that as well. If you don't have a good handle on your payload weight, then perhaps a gram per mile is something that you want to pay more attention to.

SmartWay Ranking
Now for our ranking. SmartWay displays your results in essentially one of five performance ranges. So if you're a truckload dry van, then you're looking at a <midpoint> gram per mile for the CO_2 metric, okay? We don't put in your actual gram per mile. We initially developed the program in association with American Trucking Association. They had some concern about displaying that specificity of data, so we curve that to develop these performance ranges.

I'm going to explain these performance ranges not only in how they're constructed, but how you can use them, because this is public data, and this is where you as a fleet can get a lot of your benchmarking data. Essentially, we developed distribution curves for each distribution category in that truckload, dry van, CO_2 gram per mile. For example, we get a different result with data that we got in from last year. We developed a distribution curve of performance. We then divide that curve into five roughly equivalent groupings, where each range is composed of approximately 20% of the fleet. I say approximately, because fleets come in and out throughout the year, so it's approximately one-fifth of the population. What we do is we list the high and low ranges for each bin, and we display the midpoint emission as the public information. If you fall into the SmartWay bin two, or performance range two, your performance could be anywhere within that range, but what will be displayed publicly is that midpoint. So about half of the companies are better than the midpoint, and about half are worse than the midpoint. But these are within a fairly narrow range, within 50 to 100 grams per mile, so it doesn't tell specifically what it is, but it does get very, very close.

SmartWay Ranking
Next question is: "O.K., so I have that information; what does that mean--how good am I?" The example I'm displaying is for a refrigerated carrier that's in bin 2 for grams per ton-mile. So they're right in this bin. That means, at minimum, you're better than all the carriers in bin 3, 4, and 5. They're approximately 20% each, so you're better than 60% of refrigerated carriers in that metric. And you will know what the midpoint is, because that will be displayed publicly, and you'll know your data. So you'll know which side of that midpoint you're on. If you're on the better side of it, that means you'll be better than 70% of those companies. If you're showing up as a carrier in bin 5, that's showing that 80% of your peers are doing better than you in that particular metric. So that may be some business intelligence to maybe look at how you're doing things, because 80% of your peers are better in that metric.

SmartWay Ranking System

Graphically presented, we have those six performance metrics and you can think: the lower the bar, the better. These are the 5 performance bins, and 1 is the best. So you can see that this company is really good in CO_2 grams per mile, pretty good in the grams per ton-mile, but they're way high for NOx and PM for both metrics. That may mean that they have a fleet that is being operated efficiently, but it's being done with older, dirtier trucks.

So when you go back and look at where you're comparing, you can essentially create this sort of graph yourself for whatever form you're looking at, and understand: "Hey I'm in bin 1 for something-- that means my company is doing pretty good." <or> "I'm in bin 4 or 5? Maybe I have some work to do."

Public (online) Carrier Performance Data

<on screen: screen shot of a selected view from the online public carrier performance data spreadsheet, accessible from http://www3.epa.gov/smartway/forpartners/performance.htm>
Now online, this is from our website. This is our carrier performance data. This is the information we show publicly, so you can see the gram per mile CO_2 Rank, this is in the bin two. And this is the midpoint, this 1,560 gram per mile for CO_2, and it goes all the way across. So for any particular company you'll see where you're at. Down here you can look at all, auto, or maybe you want to look at LTL. It's up to you. You can see how you fall into that.

Other Ranking Systems

So our ranking system isn't too different from other ones that you may have seen or are familiar with, and the example I threw up here is the old Consumers Reports Car ratings where they have the different color balls. Now we have a one to five performance ranking system for six environmental metrics. In the same way, when you're buying a car you may be concerned about fuel economy versus horsepower, you're going to have ratings for all of those. It's going to depend on what's important to you, and it's going to depend on what's important for the shipper, what they look at. We don't necessarily prescribe how they look at it. We just give them those six metrics and let them look at that based on their own system.

SmartWay Ranking

So a bin 1 is a bin 1, right? Not exactly. For example, bin 1 for truckload dry versus bin 1 for refrigerated trucks: Both of the bins represent approximately 20% of their categories, but the categories are not alike. Typical performance is different. So when we graph those data, the distribution curves, those curves are going to look different. For example, refrigerated trucks, in addition to moving the freight, also have to keep cold, so the emission rates tend to be a little bit higher for refrigerated carriers than truckload because they have to have that reefer fuel. If you look at the bin 1--for truckload dry van CO_2, it's 1480; for refrigerated, it's 1540, and it's even different for flatbed. So the gram per mile and the gram per ton-mile are specific to each category. It's going to be the gram per mile. You can compare that across all. If you're looking at the numbers, the 1, 2, 3, 4, 5 numbers that are displayed, those are only relevant *within* categories. For example, within LTL you can look at 1, 2, 3, 4, 5, <and see> how you compare to other LTLs.

A quick note on other ranking categories: multimodal does not display performance ranking with the numbers 1, 2, 3, 4, 5 for multi-modal. The reason is, multi-modal is currently too diverse for a relative comparison. We're just putting in the gram per mile or the gram per ton-mile numbers.

Ranking for Other Categories

That's because you can have a multi-modal company that can be 90% rail and 10% truck, or vice versa. Logistics however, treated like truck, has five performance ranges. Barge carriers have agreed to display their actual gram per mile and gram per ton-mile data. Rail, unfortunately--the railroads have not agreed to have individual company data displayed in any way. For shippers, we're only able to display an industry modal average. And we're working on the final scheme for air. A lot of air carriers will likely be in multimodal.

Non-SmartWay

Now, for non-SmartWay in this coming year--non-SmartWay carriers previously had a very, very bad default number. They are going to get a slightly better default number this year that's equivalent to a calculated "bin 6" number. Now there's no actual "bin 6," but we had to give them something so they don't submit data. So with that default number, we want to be conservative, because we don't want them to sound better than they actually are. We want to make sure than any company that submits data to SmartWay, their submission numbers are going to be better than a non-submitter; otherwise, there may be a weird incentive not to submit. So by participating in SmartWay, the number that we display to your company is always going to be better, regardless of what your performance is, than for someone who doesn't submit data, simply because we don't know what their data is and we assign them a very conservative default number. So that's an additional benefit from being in SmartWay.

How Do Shippers Use SmartWay Scores?

Now, how do shippers use SmartWay scores? We're going to go back and look at the shippers. Shippers have something called corporate social responsibility that they have to deal with, especially the ones dealing with retail-level customers. They need to determine emissions, not just from their freight, but <also> stationary sources and a whole range of things, so they have a big job to do to determine how much pollution they are making.

SmartWay provides a standardized way for calculating these emissions for shippers, and that again, as I mentioned before, makes it unnecessary for them to call all of their carriers individually and say, "Hey, what's your score? What's your score?" You'd have the case of one carrier who may calculate it one way, and another carrier who may calculate it another way. There's no standardization, and that's not good.

So shipper emissions, they report these to their shareholders, they have greenhouse gas reporting requirements, especially the multi-nationals. So that's how they use it. It's important for them to get that data.

Relating to you, the carriers, how shippers use that--they use it in a number of different ways. A fair number of shippers in the program require their carriers to be SmartWay. If you want to bid for their freight, you have to be SmartWay. Some of them are requiring certain carriers to be certain bin levels within SmartWay, so they're selecting better-performing SmartWay companies. Some are giving preferential fuel surcharge rates to SmartWay carriers or high performing SmartWay carriers. Some of them give bonus points in bid proposals and carrier selection criteria, and many of them are requesting to submit their SmartWay registration document with a bid. So the shippers are definitely looking to hire and promote SmartWay carriers, and they do have various ways to incentivize your participation.

What does a Shipper Tool Look Like?
<on screen: shipper tool "Input Carriers" tab> Again, looking at a shipper tool. This is a peek inside the shipper world so you can see it from their perspective. Again, this is just a recap where they input their carriers. The next thing that they have to do once they have their carriers listed is that they have to say how much weight they moved with those carriers, where they're either inputting ton-miles, or miles that they do with each carrier. SmartWay then takes the ton-mile that they do with any particular carrier and we multiply it by grams per ton-mile for the CO_2, NOx, and PM, and that allows us to calculate the total mass emissions of CO_2, NOx, and PM for those shippers.

What does a Shipper Tool Look Like?
The shippers can display the SmartWay information in their tool. As you can see, I blew this up, I expanded the truck carriers, showing the CO_2, NOx, and PM both in gram per mile and gram per ton mile. They can display in many different ways, or they can look at only the bin number. There's many different ways that the shippers can look at that public data. Again, this is the sense of business information that they've submitted. It's only reiterations or different ways of displaying the six emission metrics.

Last Look – SmartWay Scores
So a last look at SmartWay scores. Each score tells a story, and each fleet is unique. Now the best possible score is that you're in bin 1 for everything. But you may also have a highly efficient fleet that's using older trucks. In this cas, your CO_2 is going to be a low bin number, meaning good performance, and your NOx and PM may be high. So when you're looking at your performance, you have to look at your full range, both metrics, and all pollutants.

But What Do I Tell My Shipper?
The next question is, "But what do I tell my shipper?" Because the shipper will sometimes call and say, "Give me your SmartWay score." This is not necessarily a simple answer for many carriers. Again, because we have *six* metrics, we don't say which one to use. In general, if they don't know what they're looking for, you can say your gram per ton-mile carbon performance and give them your bin number. That's the most basic one, simple.

But a good answer is--and I've written it here, and you'll have access to this presentation so you can use this--give them a little education about SmartWay. There are six scores, two metrics, three pollutants. You can send them the six scores, or you can direct them to the SmartWay website. If they are a member of SmartWay they can call us, and we can help explain the scoring system. We've done this for a number of carriers who've had shippers ask them for information or have been having to deal in that realm.

Shipper Answers Cheat Sheet
We've also developed a shipper answer cheat sheet that will help you in responding to shippers if they ask for your SmartWay score and they want it immediately. We have the performance ranking spreadsheet, the SmartWay Partner list; there's a hotline they can call; they can email us and we'll have the webinar presentation uploaded to our webinar list as well. All of this will help you respond to your shippers.

Truck Tool Data Reports
Now, the truck tool data reports: what you put in, what you get out. As I mentioned before, if you put in the effort, you might as well reap the rewards, so use it.

Truck Tool Data Reports
<on screen: truck tool "SmartWay Reports" screen> We have a lot of reports that are programmed into the tool. You can click on these and they will generate an Excel sheet that you can print out and look at.

Data Reports
<on screen: truck tool "SmartWay Reports" screen, "Internal Metrics Report" button selected> If you're looking at the data reports, this is looking at this first one: internal metrics report. Once you put that in, you'll have the choices of the level of detail you wish to display. I clicked this one, and then it will pop up a spreadsheet that SmartWay's got color coded with your information in there. That's good, you can do that year to year, track it, lots of good information, and that's just one report of many that we have on there.

Data Reports
This is a blow up of the data report I just showed. It shows the different fleets listed and what their performance is. We look at total miles, revenue miles, and loaded miles. That's of interest to carriers. We look at grams per mile, grams per ton mile, essentially cubic foot miles and then utilized cubic foot miles, so this is a valued metric efficiency number.

Data Reports
<on screen: truck tool "SmartWay Reports" screen, "Activity Information Report" button selected> Then again, this is just one more. The activity information report shows all your data entries on the activity tab of the truck tool. This is great if you're done filling out your tool, you print this out, just take a look at it and make sure it makes sense. Sometime people make mistakes so this is a good way to go back and review your tool.

Year-to-Year Reports
We also have year-to-year reports. If you've been participating in SmartWay for more than one year, this is really good to have, not only for showing if you had any clerical errors because it will show up very easily on a year to year comparison, but it's nice to see over time how your company is progressing in all of these six efficiency metrics. So this is a snapshot of the year to year report in the tool.

Year-to-Year Reports
Data Reports
<on screen: truck tool Home screen "Review Your Year-to-Year Performance" button selected> You'll be able to look for and load data from a previous year, so in this example I took 2014. Put that in there—it will load into the tool itself, you can compare on a partner-level or a fleet-level, and then it will compare these two example tools to each other. And this is what it looks like.

Year-to-Year Reports
Make sure that your identification information shows your MPG. In this example it when from 7.15 to 6.91, so it went down. It shows your average payload, your volume, what your classes of vehicles are doing, and it scrolls further and provides a lot of good information.

Managing SmartWay Data Requirements
Managing your SmartWay data requirement: Our tool at this point is pretty stable. It doesn't change much from year to year in terms of the data we're requiring, so it's a good stable

platform. It's good for you to track that performance. You want a good recordkeeping system. Partners who are successful develop what we call an information funnel. They work with other parts of the organization to get standardized reporting sent to them, especially if they're a large company. We have data sheets that you can use as templates on the website, if you want to collect it that way. Or you can just work with your IT folks to get that information.

The thing to emphasize is: a lot of the data that SmartWay requires is data that is good for you to be tracking anyway, because it deals with the bottom line. In fact, we've had some small to medium carriers who've come into the program because their shippers required it and said, "Well, we have to send in all this data. This is just another data tracking. Why do I have to do this?" Then after two or three years they talked to their partner account managers and said, "You know what? I really should have been tracking this data anyway."

And then, if you're the person doing it, data is power. This gives you insight into your company that you can use. Maybe you need to use SmartWay to be the bad guy. We can be the bad guy if you need to use leverage to improve other parts of your organization.

We suggest to invest in "Big Data." Companies are gaining competitive advantage through data systems. SmartWay reporting should be a small component of your overall data handling capabilities. If you're a small company and can't do it yourself, find ways to really look at ways to develop that data. You could get a student intern, or you could possibly get some through the financial tracking software that's out there. But start tracking that data. Your partner account manager can help you if you need that help.

Please remember
Please remember, as a partner, we want you to pay attention to the SmartWay emails. We send out information about when the tool's coming, and other various parts about SmartWay.

Make sure the emails aren't treated as SPAM. Sometimes they go into the SPAM folder because some of them are mass emails.

Make sure your company has a current SmartWay contact to ensure continuity of operations if you leave your position or are promoted. A lot of people get promoted and they don't really have a successor, and that causes trouble for the new person. So be considerate of that. Having a backup person in your organization is good.

Make sure you save your work in SmartWay folder. We get a lot of carriers who call us and say, "Hey, I don't have my last year's tool. I want to have it for record keeping or so I can compare." So having a dedicated folder is good.

And please use SmartWay for benchmarking and improvement. We really designed this program with an eye to helping carriers get a sense of how they're doing and where they need to improve.

Most important, if you have a question, don't hesitate. Ask your partner account manager. A lot of carriers wait until last minute and try to do things by email, but just pick up the phone. We will return your call quickly. Get to know your account manager.

What's New This Year?

So what's new this year in the tool? We've come out with something that's been very popular with our customers, and that is that we've designed a way to auto-populate steps 1, 2, and 3 of the tool. That's name, contact information, and fleet descriptions. In many cases this does not change from year to year, so we've done a one-click button to get those populated. This is something partners suggested in feedback mechanisms, so we listened and responded to that.

Data source descriptions: I saw in the example tool that this was something that bugged me. We took a look at it and moved it out of the activity data screen and made it so you don't have to fill that in as many times. We looked at making it smoother. There are less screens and less data entry. It's really designed to accommodate and move the experienced user through the system better.

And for new partners, we developed a new joining process. I'm not going to go through that because it was covered in the previous beginner webinar, but there's an online form now to complete steps 1, 2, and 3 *<being revised to just include steps 1 and 2>* and essentially become an applicant in the program.

Truck Tool Demonstration
So with that, I'll move into the truck tool demonstration. I have a lot of tools on this screen, so bear with me as I try to pull up the correct ones. I'm playing with three screens here.

SmartWay Data Year 2015
So the first thing I'm going to do…this is just a blank tool. Now if I go back to the beginning, once more. It says, "Welcome to the 2016 SmartWay Truck Tool." We've collapsed all of the resources into one screen with links, so you don't have to click through as many. There's a little video here that will display and give you an intro into the program.

There's the usual partnership agreement. That hasn't changed.

This is going to be a new screen. If you're a new partner *<"applicant">,* you use the "on-ramp," or if you're an existing partner you can just input your SmartWay ID. If you don't know your SmartWay ID, we do email that to you at the beginning of the year and various times throughout the year, and your partner account manager has that number. If you're a new partner and you go through the process, you will be assigned one. If you don't know it, you can click the link that says "email it to me."

So you're going to have your ID and you'll enter that here. Then you're going to click "Auto-populate steps 1, 2, and 3." I've already done that just to make sure it worked.

SmartWay Validation
It says the various screens were auto-populated and it shows you the various information.

SmartWay Data Year 2015
And then when you go on to the next part of the tool, you will see that the name has been filled in for you. You will see steps 2 and 3 that are not checked, because we do want to confirm that you reviewed the information.

SmartWay: Contact Information

But if you go and click contact information, you will see that all the contact information has been filled out. So once you've looked at it, you can click "I confirm that I have reviewed my contact information and that it is correct."

SmartWay Fleet Description
And then you do the same thing for the fleet description. You're just going to want to make sure that all of this important information is good: your operation, body types, SmartWay category. Once that's all good, you can just go back to home.

SmartWay Data Year 2015
Again you've got the same thing. The box has been checked; that means it's been filled out, and you can click "I confirm that I have reviewed my fleet description and it is correct." So then we'll be able to look into the data entry part. I just wanted to look at this particular tool to demonstrate how simple we've made steps 1, 2, and 3.

SmartWay Data Year 2015
Alright, let me fill out the pre-filled out sample truck tool, and again I'll go through this one fairly quickly and try to leave time for questions.

Truck: Seville Enterprises: LTL
For data entry we've simplified this general information screen. The percentage of operation in the U.S. and Canada--this is an approximation. You can get additional detail in the tool by clicking the question marks throughout. This is to determine the program benefits in the U.S. and Canada; it's not going to be used in your score.

You will next want to select what type of fuel you use. We have diesel/biodiesel, gasoline/ethanol. We also support a number of alternative fuels. Your short-haul vs. long-haul split, again this is to characterize your operation. Again, if this fleet is categorized as less-than-truckload/dry van, we want to enter the number of loads per truck and the average weight of load for this fleet. You may say, "I have eight different pallets and the average pallet weight is…" We've added this because LTL carriers have historically had some issues in determining what payloads to use.

Let's flip to the diesel tab. That shows up as highlighted, because you clicked it in the general information as the fuel type that you have. If you had input that you also have gasoline vehicles, another tab would be active. You are going to put in your engine model year and class next *<on screen: "Engine Model Year & Class" tab>*. This fleet is using class 7 through 8b. You have pictures up here to describe the type of trucks. You are going to want to scroll down here and input the number of vehicles you have for each of the model years.

Now, this screen actually is used primarily to determine your NOx and PM emissions, and it's based off of the EPA standards that apply to the different truck classes. So the newer the truck, the cleaner it's actually going to be. So you'll see that in your scores and your rankings. As you move to newer trucks, your NOx and PM will maybe move to a 1 or a 2, when for PM it's sort of been a 4 or 5.

I'm going to move to the activity information screen. This is the primary data entry screen. Data is input by the truck class. So you can see that classes are replicated here. It's pretty much self-explanatory. You're going to look at total miles, revenue, and empty miles. Revenue miles are

for looking at efficiency metrics internally for you. The revenue is not used in determining your score, *per se*. Again, if you have questions, you click the question mark, and you'll get a little pop-up that says what we're looking for.

Gallons of diesel: it includes biodiesel, your payload, truck volume, cargo volume. Road type and speed categories: these are used to modify the previous engine model year and class information in terms of what your NOx and PM are.

SmartWay: Road Type / Speed Categories
So sometimes for these it's a little difficult for people to know exactly what this is. Try to use it to the best of your ability. Some bigger companies can pull this sort of data directly off of an ECM into a computerized system and have it all crunched for them, other ones aren't quite at that level. If you have absolutely no idea, you can click "populate the urban driving fields with default values." The better your information, the better your results are going to be.

Truck: Seville Enterprises: LTL
Now down at the bottom we have a lot of these buttons here. I want you to know that you can print this screen. If you have vision issues, you can zoom in. If you need help on this particular screen the "Help" button will give you information specific to this screen. If you want to see a little movie to show you exactly how to fill the cells out, you can click the "Screen Demo" button, and a movie will pop up. If you want to add comments, you can. Maybe you're looking at saving your data sources from year to year, so next time you'll know where they're at. That's good to have.

Then the "Validate Screen" button is very useful to find errors. Particularly in this screen--I've filled it out without any errors, but if, for example, I were to have forgotten up here in the "gallons of diesel" a digit, you'll now see the MPG check shows 62.3 gallons of MPG. If I go to validate the screen, you'll note that this cell has now turned red. Depending on the level of potential error, this may turn yellow, or red. That's not to say that if you get a yellow or red on your tool that we're saying your data is wrong, we're saying that it is suspect; especially for the red. The yellows and reds are generated by data that shows outside the certain standard deviation of the norm for that data. I showed those distribution curves. We essentially do those distribution curves for every single data cell in the SmartWay tool. We develop those curves and then we say, if it's outside of a certain range, it gets a yellow flag. If it's outside of that, it gets a red one. Some red ones are outside of the realm of physical possibility, so those are also flagged as red, and you would need to correct that.

SmartWay Validation
Once you validate, if there are any errors--or yellow or red flags showing up--they will show up. And then if you want to see a list of the possible errors you can say "Yes," and it will tell you specifically, for diesel activity information, for MPG under truck class 8b, your value exceeds the maximum allowable miles per gallon, which is 11.2. Again, anything above 11.2 is a physical impossibility at this stage. That may change if we get different hybrid class 8b trucks, but at this point, it's saying it's impossible.

You can also show all of your errors in a spreadsheet so you can go back and check.

Truck: Seville Enterprises: LTL

It's now red. If it was high, maybe 9, I could click the box and try to explain it. It would give me a box to explain, but because this one is so impossible it's saying I have to edit the value. So I realize because I forgot this number up here, then that goes to something more reasonable. You click "Validate Screen" and it looks fine.

I'm just going to play with this one more time. I'm going to change that value, so it's 10.4. I'm going to validate the screen. Again you'll see this one's red because it's very unusual, but I can click on it because it's not outside of the realm of possibility. And then I can type in "I haul potato chips with super high efficiency trucks." We would be looking for an explanation with a little more detail in it, but then you'll see it turns to yellow.

You can turn in a tool with yellow cells, but you can't turn in a tool with red cells; it just won't allow that. Then the final thing that you need to do--you'll notice that on the previous page we had the data source descriptions that made it pretty busy. It's kind of snuck over here to the far right. You might not see this normally, but it is highlighted in black as opposed to gray. You will need to go look at your Data Sources, and this is set up just like the old one, but it's a separate page. If you did have, for example, different fuel types, you'd simply be able to replicate that by clicking a box to apply that to different alternative fuel types. You wouldn't have to type in the same information over and over again. And as we move forward, we are going to be looking at trying to simplify this particular screen a bit more if possible.

SmartWay Data Year 2015
So that pretty much covers it. *<on screen: truck tool Home screen "Give Us Feedback" button>* You can give us feedback. You can rate this webinar. You can rate the tools. There are some open-ended questions, and we highly encourage you to fill this out. Each year as we look at tool redesign, we look at all of these. We look at the customer service. I can look at the customer service by any particular partner account manager, so feel free to put this information in. It does serve as the basis for how we plan improvements in addition to our own ideas.

SmartWay Data Year 2015
Of course you can look at your results in terms of data results, I went over that earlier. Your year-to-year performance, I also went through that.

Finally when you're done, you'll click a button that will generate an .xml data file. We ask partners to generate this .xml data file as well as save the file that it is currently in, which is an Excel file.

So if you look up here, if you click save up here or if you click save down here it will save your Excel file. If you click "Generate a (.xml) data file," that essentially strips the data and puts it into a file format that is essentially compressed, and it's a very small file size compared to the overall tool. So we added this function for the case in which partners have email server limitations, etc.

SmartWay Data Year 2015
So you would click "I understand and agree to the terms of this agreement." You'd say you're an existing SmartWay partner, you're going to put in your SmartWay ID. You can get that, and then you're going to generate the .xml file.

If you can, if your email servers will handle it, we ask you to email us your Excel file and your .xml file because that makes it easier for us to process. It also means that we have it, if for some reason you haven't kept track of your information, or if someone else takes over next year. You'd be able to pull that information. We'd be able to give you that data, so it helps continuity of operations.

SmartWay Data Year 2015
We are almost exactly at 3 o'clock so I'll stop now and if Mary comes back online we'll see if there are any additional questions that folks had or if there's any other way that we can provide you with assistance for the remainder of our time.

Cover Slide – Mary
Mary Walsh, EPA: Great. For those of you who need to go at 3:00, we thank you for your attendance. We do have the survey questions available and there should be available for your download a copy of this presentation in the GoTo meeting window. If Sargon is on the line, could you direct people to find that, and if you are not, I want to continue by saying that this webinar will be posted on the SmartWay site that we showed you at the beginning of the presentation on the housekeeping slides. Matt, can you turn to that page showing the SmartWay homepage?

SmartWay Homepage
Yeah. Right there the URL: www3.epa.gov/smartway Go to the "News & Events" area again where I showed you. Click on "Webinars", and the next page is the past webinar resources.

SmartWay Webinar Schedule
The slides should be up next week, and the entire webinar recording somewhere between a week and two weeks we get it back from the contractor and we vet it, to make sure it's good quality. < www3.epa.gov/smartway/webinars.htm#old; select blue "Past Webinar Resources" tab> Then we post it up for you there. So you can keep checking if you don't see it there the first time.

Cover Slide
Mary Walsh, EPA: I'm not necessarily hearing from our friend the location on the GoTo meeting page. I don't necessarily see the same thing that all our attendees do. I will turn to some of the questions we got. For those attendees who would like to listen to some of the general questions that we received, stay on the line. We'll keep talking for another moment.

We received a question about where to find the information that people need to collect for the tool. If you go to the SmartWay website--again Matt, that homepage--let's direct them to the "For Partners" page. <www3.epa.gov/smartway/forpartners.htm;>

SmartWay Webinar Schedule
There we go. That's the home page. Show them "For Partners" and then "Tools and Guidance." Okay. You're going to tap on the Truck Carrier tab there. There you will see your truck tool, your example, your truck tool user guides. The Quick Start Guide, the second guide under the user guides category has in the appendices a complete set of worksheets that you can use if you wish. It tells all the information you need to collect for the tool. Also, in the tool itself there's a button near the front on the introductory page where we have the SmartWay video as a button that connects you again to the information that you need to collect for the tool. If you have any

information about the tool you can always check with your partner account manager who can help you out.

SmartWay Data Year 2015

 "Gathering Data" would be the tab that you need in the tool. Yeah, that's what we're looking for. There you'll see, this is the nature of the information that you'll need to collect.

Alright, I'm going to ask Rick, if he's listening and has an open mike, he can add any other questions that he think might be good for general consumption. Has my question box disappeared? *<Question log disappeared, so Rick C. was unable to bring up questions.>*

Rick Cousineau, EPA Contractor: What's good to know, as Matt pointed out in the webinar is, once you're done with your tool, review your data to make sure you have good quality data. A way to do that is to verify that the information looks accurate and is representative of your fleet. And then secondly, to do the year-to-year comparison if you're already an existing partner and have completed a tool in prior years. That would highlight any major differences. Thirdly, if you do have any big differences because you've acquired a fleet or reduced a fleet, added trucks, any bigger changes that happen year to year. If you include that in the tool in the comments section, and/or in the email when you forward the tools to your partner account manager, that would also greatly assist in the process of reviewing and approving the tools. That's pretty much it for overview for what I have right now.

Mary Walsh, EPA: That sounds like a good tip. Well, I think we're going to close it out... For those who may have asked a question but are not sure if they got the complete answer that they were looking for from us during the course of the webinar, feel free to email us. You can email me if you received an invitation from me with a return email address on it. Otherwise you can go to the SmartWay homepage and look for "Contact Us." http://www3.epa.gov/smartway/contact.htm Can you show us where that is Matt? I'm not sure if it made its way into the screen shot of the SmartWay homepage or not. Go ahead and go back there.

SmartWay Homepage – Mary
You can contact us either by email, or by telephone. Just go down to the bottom right, it says "Contact Us." There we are. You click on that and it shows both an email that you can use to contact us and a phone number. Those queries will be directed to people who will get back to you within the next couple of business days.

Matthew Payne, EPA: I'd like to add in particular, especially for those who are still on, and hopefully there's a fair number, we'd like to get feedback as to the level of detail in this webinar. As Mary mentioned before, it is kind of the first time we've had an advanced webinar where we really tried to dig into the details. We'd really love to hear if the details were just not relevant to you, if there was too much detail, or if we went to fast, or if you would like additional detail, or specifically, what you would like the content of these webinars to be in the future, because our goal is to educate and try to respond to the information requests from all of our partners, and we can't do that unless we hear from you. So please let us know.

Mary Walsh, EPA: Alright, I think with that we'll close it out for today, hoping that everybody is going to be including their replies to the survey, providing that kind of commentary for us to make better presentations for you, our customers. So I wish you all a very good afternoon. We

hope that the webinar was usefully to you and we look forward to future contacts with you. Good afternoon. Good bye.