

# Appointed Representative Partnership Opportunities

An introduction



Laureate Status  
2013 - 2021



Fleeteye CSI Winner  
2015, 2016, 2018, 2019



Platinum Accreditation  
Accredited since 2001



9001: 2008  
Quality Management System



14001: 2008  
Quality Management System





Welcome

# Contents

- 2** Who we are
- 3** Benefits of being an Appointed Representative
- 4** Financial overview of package
- 5** Access to leading FN50 quotation systems
- 6** Fleet electrification
- 7** Our award-winning team
- 8** Marketing support
- 9** Our leadership team
- 10** Operating in a regulated market
- 11** Fleet 360
- 12** Salary sacrifice
- 13** Our technology
- 14** Awards and accreditations
- 15** What our Appointed Representatives say about us
- 16** Our clients
- 17** Next steps



## Who we are

**The Fleet Alliance Group is one of the UK's largest independent providers of leasing and fleet management solutions.**

Our multi award-winning services span consumer to corporate, from private individual leases to full-scale fleet management. We were the first to introduce an franchise Appointed Representative offering in 2002 making us the longest-standing and most successful provider of broker partnerships in the UK.

Fleet Alliance Group is comprised of two well-known industry brands: Fleet Alliance which caters to corporate fleets and our consumer division Intelligent Car Leasing.

Across our brands, we cater for all customer types - from personal leasing through Intelligent Car Leasing, whilst Fleet Alliance provides a complete fleet management solution for large corporates with the option to fully outsource.

Fleet Alliance also has a strong focus on the SME market, offering competitive leasing options and cutting-edge technology solutions for small businesses.



**Over 32k**  
Vehicles under management



**£1bn+**  
Combined asset value



**92**  
Award-winning team members



**6k**  
Vehicle purchases per year



**32b**  
Total CO2 reduction (grams) since 2008



**93%**  
Average client retention



**x10**  
UK Best Place to Work Awards



**x4**  
Benchmark customer satisfaction wins



**15+**  
Years as an accredited Investor In People



**£.6m**  
Charity fundraising over last 8 years

# Benefits of being an Appointed Representative

## **Fleet Alliance was the first broker to introduce a franchise Appointed Representative offering in 2002.**

Choosing to become an Appointed Representative means you'll be partnering with the longest-standing and most successful provider of broker partnerships in the UK and one of the UK's leading independent providers of leasing and fleet management solutions.

New Appointed Representatives can realise a healthy and profitable business within months of joining us. Our dedicated and knowledgeable support staff offer considerable experience in dealing with any day to day issues you encounter and are fully invested in your success.

Fleet Alliance provides you with a complete set of tools designed to get your business up and running quickly. All business is administered through our industry-leading systems keeping you in control of your customer information vehicle order status, whilst our support staff deal with all administration, leaving you free to deal with customers and sell our leading contract hire offers.

### **Unrivalled purchasing power**

Access to our unrivalled purchasing power based on a fleet size of over 30,000 vehicles with a value of over £1bn

### **Powerful industry relationships**

Benefit from long-standing and powerful relationships with all leading funders and an extensive network of dealerships and suppliers.

### **Award-winning brand**

The ability to trade under an award-winning brand that is recognised and respected throughout the leasing industry.

### **Extensive product portfolio**

Offer an extensive portfolio of proven fleet products and services to your clients from day one. Capitalise on current market trends such as the shift to electrification with our salary sacrifice product which differentiates itself from competing solutions by being available to SMEs and larger corporates alike.

### **Support for large fleet opportunities**

No fleet size is too big. Receive full support on tenders and pitches, ensuring they are created to the highest standards.

### **Proprietary technology**

Take advantage of proprietary award-winning technology platforms that streamline day-to-day operations and offer an attractive prospect to fleet customers.

### **Award-winning support**

Enjoy the support of an extensive and highly motivated back-office team who have a proven track record of award-winning customer service.

### **Reliable systems**

Effective and efficient systems quickly and reliably manage orders through to delivery and beyond, allowing you to concentrate 100% of your efforts on selling.

### **Finance Automation**

Guaranteed payment in your account 14 days from the deal being funded by Fleet Alliance head office. Significant reduction in administration time as Fleet Alliance will generate your commission invoice. Confirmation of payment by remittance and invoice sent by email so you have all the information for your accounts.

### **Compliance guidance and support**

Legislation is constantly changing and will continue to do so. Maintaining compliance can be extremely time consuming. As an Appointed Representative our Compliance Team are on hand to provide guidance and support. You will have the advantage of working within our policy and procedures framework which will ensure you remain fully compliant and meet the standards required by the FCA.

# Financial overview of package

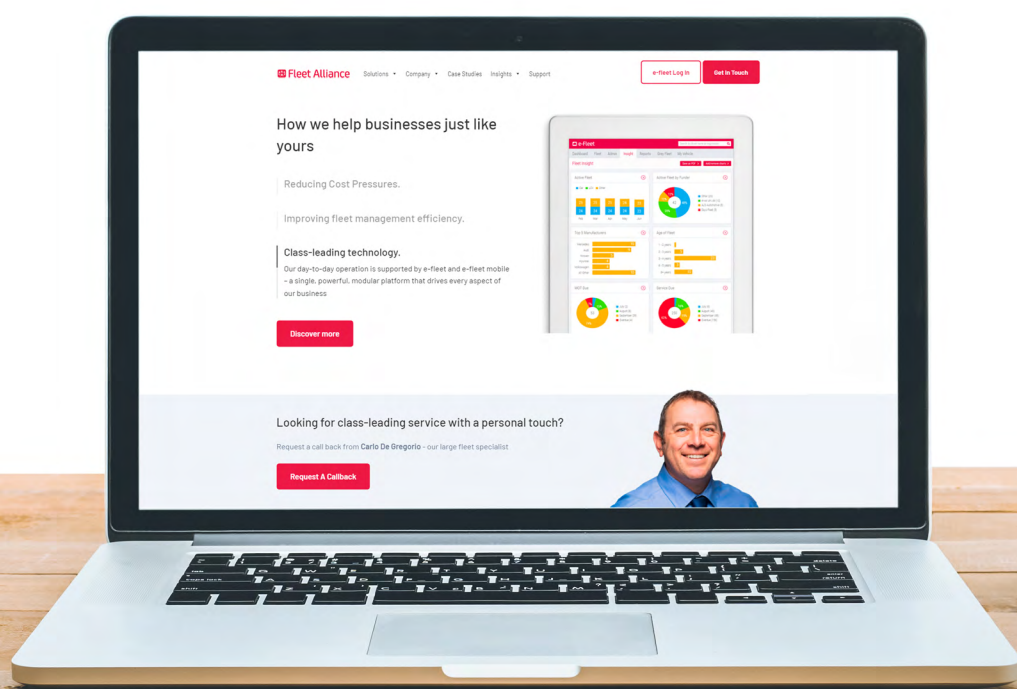
## A competitive package that offers an extensive array of products, support and benefits.

Fleet Alliance Appointed Representative package provides a flexible agreement.

Whether you are in the market for the next 3 years or for the next 25 our one-off fee will establish a committed long term agreement.

The first step to our Appointed Representative programme is an agreed engagement fee of £4,995 + VAT on signing of our legal agreement. Thereafter monthly management fees are applicable within our offering to support the following:

- FCA fees
- BVRLA audit managed by Fleet Alliance head office
- Full induction training and consultation with our directors
- Gensen whole life cost software tools
- Electric vehicle consultancy
- Personalised CRM system including electronic documentation and e-signature functionality
- Compliance and Human Resources access.
- Sales administration support
- Direct access to our panel of 7 key funders
- On-Line BVRLA training modules plus in-house training and strategy review meetings
- IT support
- Finance automation



# Access to leading FN50 quotation systems

**We work in partnership with ten of the largest and most reputable vehicle finance companies in the UK.**

Our wide range of partners include Lex Autolease (owned by Lloyds Banking Group), Leasplan (owned by LP Group B.V) and Arval (owned by BNP Paribas).

Our impressive roster of industry-leading finance partners, combined with the strong relationships we have fostered over many years, enable us to offer our partners consistently competitive pricing.

Meanwhile our automated finance processes guarantees that payments are made to your account 14 days from the deal being funded by Fleet Alliance head office.

There's also a significant reduction in administration as Fleet Alliance generates your commission invoice with confirmation of payment provided so you have all the relevant information required for your accounts.







# Fleet electrification

## Dedicated resources to assist your clients' transition to an electrified future.

As the industry transitions towards an electrified future, our reputation for sustainable forward-thinking is helping our clients realise tangible cost-savings to both their business and drivers alike by reducing fuel costs, Benefit in Kind, Class 1A National Insurance Contributions, Vehicle Excise Duty and Corporation Tax.

Our carbon reduction programme has helped us drive down the carbon footprint of our clients' fleet by 17 billion grams of carbon dioxide emissions – the equivalent of taking 4,141 vehicles off the road.

Our driver training and awareness programmes help our clients reduce costs and emissions through driver training and risk assessment, informed vehicle choice and mobility solutions.

### Proven track record

We have a proven track-record of helping clients juggle the complex mix of requirements required to build a sustainable, cost-effective and efficient fleet.

Our considerable knowledge and expertise is helping clients:

- Understand new and emerging technologies
- Leverage ever-changing legislation and taxation
- Provide alternative mobility solutions to their drivers
- Reducing overall costs

### EV Hub

The benefits of going electric have never been greater – but there's a lot for businesses and drivers to understand. Our EV Hub is a growing resource for clients that offers advice to decision makers and drivers in order to help them make an informed decision on if, when or how they can electrify their fleet.

Our driver guides cover everything from costs and grants all the way through to technology. Whilst for businesses thinking of electrifying some or all their fleet, our guides explain the benefits, challenges and opportunities.

# Our award-winning team

**We're proud to have over 100 hard working and dedicated staff whose outstanding service levels have been consistently recognised.**

Award include a range of coveted customer service awards, including winning the Fleeteye Customer Satisfaction award four times – the benchmark survey in the fleet sector for measuring service levels from major contract hire and leasing providers.

Customer service is our mantra and it's at the heart of everything we do across the Group. Our staff are always prepared to go the extra mile to ensure that our customers receive the very best in terms of customer service.

Our awards are based on the real-life views and experiences of fleet operators, is further testimony to the hard work, efforts and endeavours of our entire team who are committed to ensuring we deliver outstanding service.

In addition to the outstanding work our team deliver for clients, we operate a grass roots initiative, called Fleet Alliance Loves. Fleet Alliance Loves is central to what we do, encouraging our core values of Engagement, Respect, Fairness, and Trust through charitable work, community involvement and environmental practices.

Supporting our nominated charities and community efforts is a shared passion. Our charity team works tirelessly to channel our passion by organising fundraising events and working with our charity and community partners to ensure we're doing the very best we can for those who need it most. To date we've raised over half a million pounds for local and international charities.

**To date, we've raised over £600 million for local and international charities.**

As a service-led business our people are the product our clients are investing in. We recruit people that have values matching those of Fleet Alliance. Prospective employees must have a sense of fun, be open, honest, communicative and have a strong sense of teamwork. Whilst business acumen is important, the ability to integrate with the people and culture of the business is fundamental.





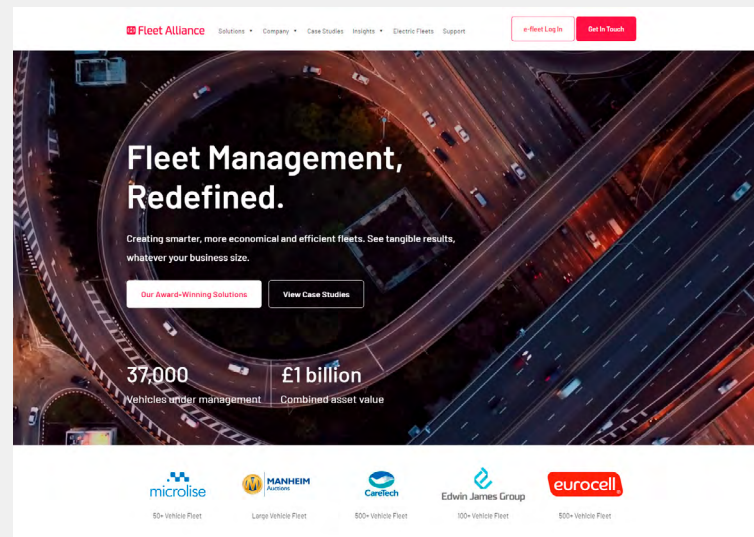
# Marketing support

**As an Appointed Representative of Fleet Alliance you benefit from being a part a trusted and respected brand.**

In addition, you have access to marketing support and a library of collateral allowing you to communicate more effectively with a wider range of receptive corporate customers.

- Take full advantage of a direct association with an established brand and the benefits and strengths that provides.
- The Fleet Alliance website provides a compelling shop-window to a complete range of products and services with a proven track record of engagement with corporate prospects.
- Our award-winning reputation provides you with the confidence and credibility to engage prospects and clients at the very highest level.
- A bespoke landing page is provided to support client engagement and firmly associate you as a part of the brand.
- A library of marketing collateral is available to support your individual marketing requirements.

- Lead generation programme.
- Direct access to our innovation projects such as Electric Charging, Supply and Mobility.



## rewarding

rd, multi-award winning company. We  
els of customer service through staff  
ct innovation.



ISO 14001 Environmental Management  
accredited for effective control of our  
environmental impact and sustainability.



Accredited with Gold status for providing best  
practice people management. Awarded to less  
than 1% of Companies in the UK.



We are a Living Wage Employer ensuring our  
staff, and our suppliers' staff, earn not just the  
minimum wage, but the Living Wage.

Fleet Alliance



## When it come to satisfaction, don't take our word for it.

When it comes to understanding customer satisfaction we rely on  
ExpertEye to independently review and benchmark our performance  
against our competitors within the leasing sector.



### Judged by the highest standards.

FleetEye CSI measures fleet customers' satisfaction within the leasing industry.  
It is the most authoritative guide to fleet sector opinion available and is used by  
the industry's leading fleet providers.



### Accurate snapshot of opinion.

FleetEye provides an accurate snapshot of customer satisfaction across all  
aspects of the products and services we supply with ongoing feedback regarding  
service delivery and quality standards.



### Consistent winners.

We're proud to have won the FleetEye CSI Customer Service award four times  
over the last five years. This is the result of hard work and constant evaluation of  
our service provision based on our customer's feedback.

Fleet 360 - Customer Satisfaction



## Our clients' feedback speaks for itself.

93%

**Net Promoter**  
How likely our clients are  
to recommend us.  
Market average: 55% (-35%)

100%

**Net Easy**  
How easy it is to do  
business with us.  
Market average: 85% (-20%)

94%

**Overall Satisfaction**  
Our clients' overall  
satisfaction.  
Market average: 86% (-8%)

Factor	Fleet Alliance	Market Average
Invoicing	97% ★	88% (-11%)
Account management	97% ★	89% (-8%)
Ease of communication	95% ★	88% (-7%)
Issue resolution	95% ★	89% (-6%)
Value for money	94% ★	85% (-9%)
Vehicle ordering and delivery process	94% ★	88% (-8%)
Delivering against promises	94% ★	88% (-6%)
Quality and availability of reporting	93% ★	86% (-7%)
Products and services	93% ★	84% (-9%)
Driver satisfaction	93% ★	87% (-6%)
End of contract process	92% ★	86% (-6%)
Day to day management of fleet	92% ★	89% (-3%)
In life services	90% ★	85% (-5%)

★ Indicates best in class performance

Source: ExpertEye survey Q1 2018

0345 601 8407 | [fleetalliance.co.uk](http://fleetalliance.co.uk)

Fleet Alliance



## Fleet 360. The all-round fleet solution

Fleet Alliance is a multi award-winning fleet management p  
manage over 37,000 vehicles for corporate clients through  
with a combined value in excess of £1 billion.



### The complete package.

Fleet 360 is a complete outsourced fleet management solution  
unique combination of advice, innovative products and techno  
pricing, and outstanding service.



### Outstanding service.

We're part of the multi award-winning Fleet Alliance Group. Top  
passionate and engaged team with an enviable track record of  
of the best customer service in the industry.



### Technology-driven, with a human touch.

We deliver Fleet 360 via our cloud-based fleet management an  
system, e-Fleet, combined with a strong people-based custom  
ensuring efficient and reliable service delivery.

Fleet 360 - Overview

# Our leadership team

Built on the foundations of a happy and engaged team of people, we foster a working environment that encourages professional and personal excellence by ensuring our people are part of a successful business spearheaded by an experienced leadership team.



**Martin Brown**

Chair  
20+ years experience



**Andy Bruce**

CEO  
20+ years experience



**Nigel McMinn**

COO  
20+ years experience



**David Blackmore**

Commercial Director  
20+ years experience



**Angela Robertson**

Finance Director  
12 years experience



**Grant Boardman**

Client Services Director  
20+ years experience



**Rob Wentworth-James**

Corporate Sales Director  
20+ years experience



**Laura Muir**

Head of AR and Partner  
18 years experience



**Terry Parker**

AR Manager  
20+ years experience

## Appointed Representative support team



**Michelle Jacobs**

AR Account Manager



**Ashley Cooper**

AR Account Manager



**Victoria Kelly**

AR Account Manager

# Operating in a regulated market

## Treating customers fairly

Fleet Alliance and its subsidiaries are all members of the British Vehicle Rental and Leasing Association. The BVRLA has over 980 organisations, all of whom operate in, or engage with the UK vehicle rental, leasing and fleet sectors. It is recognised as one of the UK's fastest growing trade associations, and our membership is a mark of quality and professionalism.

Vehicle rental or leasing customers who use a BVRLA member can be assured that they are dealing with a company which delivers the highest industry standards, adheres to a Code of Conduct and is subject to an ongoing inspection regime.



Fleet Alliance is authorised and regulated by the Financial Conduct Authority. Working within a financial market needs to be fair and honest to protect and ensure our customers get a fair deal.

Fleet Alliance abides by the six customer outcomes set out by the FCA in relation to Treating Customers Fairly.

These principles are as follows:

### Outcome 1

Consumers can be confident that they are dealing with firms where the fair treatment of customers is central to the corporate culture.

### Outcome 2

Products and services marketed and sold in the retail market are designed to meet the needs of identified consumer groups and are targeted accordingly.

### Outcome 3

Consumers are provided with clear information and are kept appropriately informed before, during and after the point of sale.

### Outcome 4

Where consumers receive advice, the advice is suitable and takes account of their circumstances.

### Outcome 5

Consumers are provided with products that perform as firms have led them to expect, and the associated service is of an acceptable standard and as they have been led to expect.

### Outcome 6

Consumers do not face unreasonable post-sale barriers imposed by firms to change a product, switch provider, submit a claim or make a complaint.



# Fleet 360

## Solutions, technology and outstanding service – all in one.

We deliver a complete fleet solution via our market leading Fleet 360 model which encompasses the key principles of both price and service. From fleet audit to grade list and vehicle manufacturer choice, we select the appropriate funding products necessary to build a well priced and optimised fleet.

Fleet 360 is delivered via e-Fleet, our proprietary cloud-based fleet management and reporting system. Coupled with a strong people-based customer service ethos, e-Fleet provides a complete outsourced fleet management solution.



### Fleet Audit

Actionable insight that reduces clients' costs whilst improving control.



### Funding

A wide selection of funding products designed to match your clients' business aspirations.



### eco-Fleet

We design future-proof, cost-effective and sustainable fleets for your clients



### Whole Life Cost

We help your clients understand the true cost, not just the monthly lease payment.



### Competitive Tendering

Your client enjoy the most competitive funding deals from our panel of leading providers.



### Fleet Management and Support

Helping your clients remove the cost and hassle of managing their fleet.



### Licence Check

Automatically check your clients' drivers' licences against DVLA data.



### Accident Management

Helping your clients significantly reduce vehicle off-road days, admin and monitoring.



### Fuel Management

Increased control over the way your clients' drivers buy and use fuel.



### Fleet Risk

Identify and eliminate the risk factors to which your clients are exposed.



### Flexi Hire

A solution to your clients' short and long term mobility needs.



### Salary Sacrifice

Deliver a tax efficient benefit to your clients' employees at little or no cost.



### e-Fleet

Enables your clients to manage their fleet in real-time regardless of funder or fleet provider.



### e-Fleet Mobile

Makes life simple for drivers and provides better control for your clients.

# Salary sacrifice

**Our flexible salary sacrifice product is available to fleet of all sizes – helping you offer an innovative zero cost benefit to the majority of your client base.**

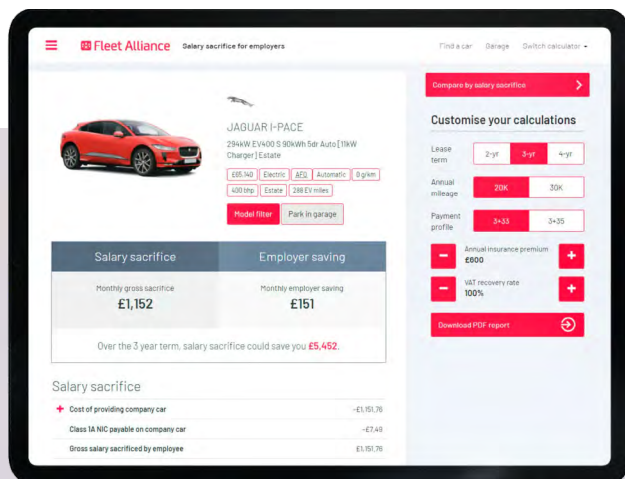
Our innovative solution offers your clients an attractive turn-key employee benefit at no cost to them.

Salary sacrifice offers cash allowance drivers and non-company car employees a cost-effective method of driving an electric vehicle and is the perfect mechanism for helping your clients increase the uptake of brand-new zero-emission vehicles thereby satisfying crucial elements of their ESG agenda while simultaneously reducing their grey fleet risk.

Our scheme is simple to set up and implement. Our product experts are on hand to help you guide your clients through the process of promotion, implementation and beyond. Your clients will receive access to a market leading salary sacrifice portal including cost calculator, car research and quotation tool, and access to our award-winning fleet management platform which makes scheme administration easy.

The benefits of our salary sacrifice product:

- Our flexible scheme offers a solution for fleets of all sizes from SME to large corporate.
- Compared to sole supply, our multi-bid funding solution helps deliver a competitively attractive savings to employees and employers alike
- We offer customers the flexibility to choose the lifestyle risks they wish to mitigate against, further reducing costs.
- You customers can take advantage of our market-leading cost-benefit analysis software, helping them quickly realise the cost-savings available.
- Our award-winning fleet management tools remove any potential pain points relating to the management of a larger fleet and ensure administration is easy.
- Our salary sacrifice experts are on-hand to assist with technical queries and assist through the pitch, implementation and launch processes and beyond.



**Salary sacrifice**

Salary sacrifice	Employer saving
Monthly gross sacrifice	Monthly employer saving
£1,152	£151

Over the 3 year term, salary sacrifice could save you **£5,452**.

**Salary sacrifice**

Cost of providing company car	-£1,851.76
Class 1A NIC payable on company car	-£7.49
Gross salary sacrificed by employee	£1,151.76

Our easy-to-use online salary sacrifice calculator helps demonstrate the significant savings available to employees and employers.





## Our technology

**Our proprietary cloud-based fleet management and reporting system that lets our customers manage every aspect of their fleet operation in real time, regardless of funder or fleet provider.**

### e-Fleet

Built from the ground up by our in-house developers and tightly integrated into our back-end systems, e-Fleet lets our customers comprehensively manage every vehicle on their fleet irrespective of supplier, including any grey fleet, through a single, easy to use system.

e-Fleet covers all the essentials from online vehicle ordering and renewal, mileage capture and business trip logging to licence checking, vehicle inspection reporting, service and MOT booking.

An expansive reporting suite lets them analyse and understand every aspect of their fleet, providing greater control and improved cost management.

### e-Fleet Mobile

Our smartphone app, e-Fleet Mobile, is the essential tool for drivers. With the app on their phone, drivers can record their mileage, book a service and access their support numbers on the move.



e-Fleet Mobile provides all the support our customers need while automating the collection of operational data into our fleet management and reporting suite, e-Fleet. This means less time spent reacting and more time planning.

### e-Fleet Admin

e-Fleet Admin functions as your Fleet Alliance portal and is provided as part of your joining fee. e-Fleet admin provides the ability to view all transactional business placed with Fleet Alliance and is accessible 24/7, with a clear transactional audit trail.

The design of our portal provides you, as the introducer, with the ability to provide a seamless service to your customers at any time of the day or week. Easy-to-use functionality and alerts are also built in to highlight any changes within the order bank.



# Awards and accreditations

**Fleet Alliance is a highly accredited, multi-award winning company. We strive to maintain exceptional levels of customer service through staff engagement and continual product innovation.**



Four time winner of the fleet industry's benchmark customer service award.



Named one of the UK's Best Workplaces™ by Great Place to Work® 10 times in a row.



Multiple category wins over the last 7 years including Best Fleet Leasing Company.



Star-accredited in recognition of our award-winning workplace engagement



Winner of Best Customer Service award and Best App award for e-Fleet Mobile.



Triple winner of a Green Apple environmental best practice award.



We're committed to transitioning our managed fleet to 100% electric by 2030



Accredited for consistently providing products and services that meet the needs of our customers.



Accredited for effective control of our environmental impact and sustainably.



Leasing Broker member of the British Vehicle Rental and Leasing Association.



Recognised for providing best practice people management for over 15 years.



We're dedicated to the physical, psychological and social wellbeing of our people.

# What our Appointed Representatives say about us



**Tony Burns**  
3 years

It's the best thing that ever happened. The terms are so much better, and the support you receive is first rate. I earn a good living and the quality of life is beyond comparison, particularly compared to when I was running Prestige.

If someone wants to come into the leasing broker business with a really well sorted funder, one that provides excellent back up from order through to delivery, then absolutely I would recommend Fleet Alliance. You only have to look at how many people have joined Fleet Alliance and stayed – they don't turn up and then disappear, which often happens with AR programmes. Many of my old Neva colleagues are still here because they value sound long term relationships. This is a proper business that also values its people.



**Jonathan Nolan**  
3 years

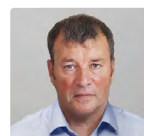
I decided that I wanted control over what I was doing. I wanted to work for myself, get some sanity back, and work with people I like. I could have gone fully independent rather than becoming an AR, but these days if you enter this industry you will spend a year getting the correct licences, getting compliance sorted, and so on. What's more you don't have funding resources.

Becoming a Fleet Alliance AR meant I didn't have to worry about all that while I also benefit from their tremendous buying power as well as getting all the funders I was used to dealing with. And you get the security of dealing with a company that has an excellent reputation.



**Sarah Bisset**  
10+ years

Fleet Alliance's multi award-winning customer service and their continuous investment in technology, to aid the fleet manager, has allowed me to grow my business with both existing and new customers.



**Chris Cooper**  
18+ years (retired)

I was a Fleet Alliance Appointed Representative for 20 years and in that time I saw the organisation grow and keep ahead of the competition. There were always a good relationship with staff and they are very customer focused and extremely professional. Feedback from customers was always good and I retained customers from the very early days, which I feel speaks volumes.

## Our clients

Our average client retention rate of 84% is the result of a powerful combination of class-leading products, services and cutting edge technology delivered by a motivated team who are focused on delivering the very best service to our clients day in, day out.

The Fleet Alliance Group enjoys an award-winning reputation for customer service. Winner of the leasing industry's benchmark customer service survey for 4 out of the last 5 years, we are proud of the long-standing relationships we enjoy with our clients.



nobia



eurocell®

utilita 

HEIDELBERG



Parkdean  
Resorts

novoferm

Tapi  
carpets



  
Edwin James Group



The e-Fleet dashboard and reporting suite is absolutely world-class and I do not say that lightly. I have been around the industry for some time and the MI reporting is absolutely second to none. It's outstanding.

**Head of Supply Chain, Cox Automotive**







## Next steps

**If you would like to join Fleet Alliance as an Appointed Representative, there are six simple stages involved.**

**Stage 1:** A video conference call will be scheduled to discuss the potential Appointed Representative offer in more detail, and to take a deeper dive into the full Fleet Alliance offering. It is vital that we understand your goals and requirements from the outset whilst you enter into our business agreement.

**Stage 2:** Fleet Alliance will request a copy of your business plan and for a Fleet Alliance application form to be submitted.

**Stage 3:** A second video conference call to discuss your business plan and Appointed Representative strategy.

**Stage 4:** On successful agreement between both parties Fleet Alliance will ask you to complete our funder application and Fleet Alliance Legal agreement in order to commence our agreement.

**Stage 5:** As a valued Fleet Alliance Appointed Representative we will schedule on-line training which will be carried out by your dedicated Account Manager within the following areas:

- Funder Quote Systems
- Meeting Underwriting criteria
- Fleet Alliance Procurement System

- E-fleet Software and mobile application.
- Applying Fleet Alliance buying terms.
- After Sales Overview with our team managers.
- Director consultancy.

**Stage 6:** Throughout our partnership you will receive a high level of support and continued training required to achieve your business goals.

### Ready to get started?

**Contact our Head of AR and Partner to schedule an exploratory meeting.**



**0345 601 8407**  
**[laura.muir@fleetalliance.co.uk](mailto:laura.muir@fleetalliance.co.uk)**

