

Driver Coaching: Best Practices & Frameworks for Success

A handbook for safety managers, directors,
and coaches of commercial drivers.

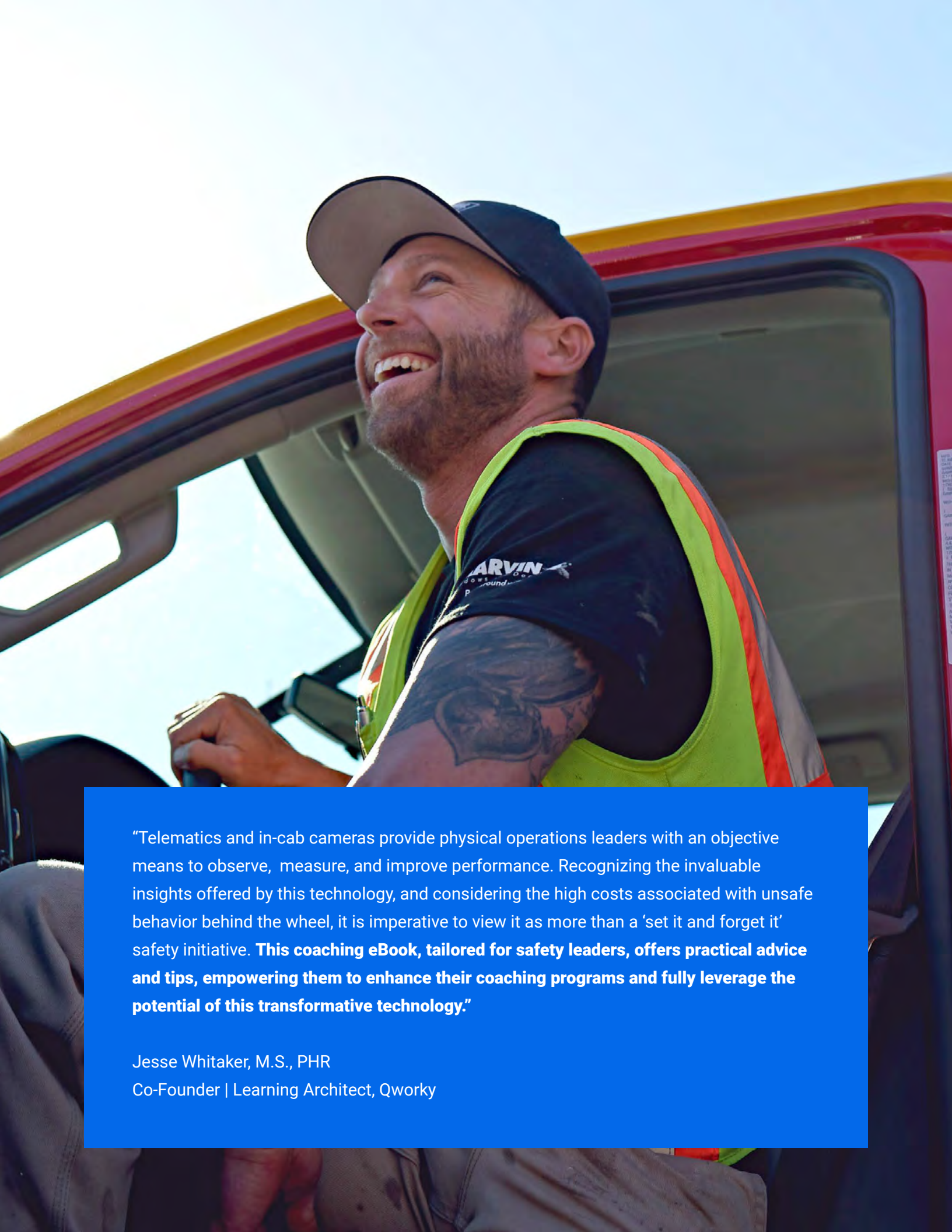


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TOGETHER FOR
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“Telematics and in-cab cameras provide physical operations leaders with an objective means to observe, measure, and improve performance. Recognizing the invaluable insights offered by this technology, and considering the high costs associated with unsafe behavior behind the wheel, it is imperative to view it as more than a ‘set it and forget it’ safety initiative. **This coaching eBook, tailored for safety leaders, offers practical advice and tips, empowering them to enhance their coaching programs and fully leverage the potential of this transformative technology.**”

Jesse Whitaker, M.S., PHR
Co-Founder | Learning Architect, Qworky

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Introduction

As Executive Director of the global NGO [Together for Safer Roads](#), I am dedicated to championing innovative and driver-centered best practices for fleet safety. For nearly a decade, TSR has partnered with businesses, local governments, and community stakeholders on projects to improve road safety standards and contribute to achieving [Vision Zero](#) initiatives. While TSR, and our purpose-driven partners, have made incredible strides in improving road safety, we still have important steps to take toward eliminating all traffic fatalities and severe injuries.

In fact, motor vehicle crashes were the leading cause of work-related deaths in the U.S. in 2020; 1,038 U.S. workers driving or riding in a motor vehicle on a public road died in a [work-related crash](#), accounting for 22% of all work-related deaths that year. For fleet safety managers, effectively coaching commercial drivers to improve overall safety has never been more important, but it has also become increasingly complex due to evolving safety regulations, rapid technological advancements, high industry turnover rates, and generational skill gaps among drivers.

For organizations looking to proactively improve their coaching programs to respond to these diverse challenges, a balanced and human-centric mindset is essential. Effective coaching combined with technology can take safety to a higher level. In Together for Safer Road's [recent survey](#) of over 500 drivers, 52% reported feeling safer following in-cab camera adoption, and 26% recalled avoiding a crash due to in-cab alerts. Of course, any new technology requires thoughtful implementation, processes, and consistency to ensure equity and a truly positive impact.

This handbook, developed by Samsara with contributions from leading experts including TSR, aims to provide a comprehensive coaching framework for safety managers and coaches, and incorporates the latest tips and methodologies from experts in the industry. Through practical guides on building effective coaching workflows and specific coaching scenarios, this book will equip coaches with foundational best practices that can be customized to their organization's unique culture and needs.



Peter Goldwasser

Executive Director of Together for Safer Roads

Peter has two decades of experience working across the public and private sectors, advising companies, non-profits and individuals on how to make a positive impact on the toughest social issues. At Together for Safer Roads, Peter partners with purpose-driven companies, government, and community stakeholders dedicated to ending traffic collisions, injuries, and fatalities worldwide.



EXECUTIVE SUMMARY

4 best practices that set successful coaching programs apart.

The goal of any safety program is to lessen the frequency and severity of safety incidents, and effective driver coaching is key to achieving that goal. Comprehensive safety strategies and coaching workflows can help you identify leading indicators and provide timely and personalized feedback when it is needed most.



01 – Proactively identify coaching opportunities.

Timing is everything in driver coaching; without timely visibility into driver behaviors, coaches can only give feedback after an event has occurred, resulting in greater chance of vehicle damage and litigation. This post-event, reactive coaching is less effective in curbing risky behaviors.

Furthermore, delayed coaching hinders potential positive impact and learning opportunities. **Shift into proactive coaching by identifying risky drivers through leading indicators—such as speeding and distracted driving—from actionable reporting insights,** and use technology to deliver feedback to drivers in real time, on the road.

02 – Empower drivers with personalized feedback.

Generic advice without context doesn't help drivers understand their own habits—and without visibility into drivers' unique behaviors, personalized feedback and recognition is impossible. **Always be transparent about what behaviors trigger different types of coaching—and empower drivers to understand and implement changes more effectively with specific, personalized feedback.**

Technology like vehicle-based data and dash cams can improve your visibility into individual driving habits, so you can tailor your coaching with specific insights and recognize drivers for safe habits.

03 – Prioritize consistency.

Effective coaching isn't just about who you coach or when you coach them—it's about consistency in how you coach dozens, hundreds, or thousands of drivers across your organization. **To ensure consistency, work with drivers to agree on clear, defined coaching workflows that specify what actions are taken based on objective data.**

Repeatable workflows help foster a culture of equity and make drivers feel more in control—when they understand what behaviors trigger coaching, they can take control of their driving and become safer operators.

04 – Set clear goals & refine your program over time.

A coaching program is only as good as its results, and the best coaches know it's about always striving to be safer. **Use concrete, objective data to set measurable goals,** such as reduced trigger rates, improved fuel efficiency, or increased driver satisfaction. Most importantly, use this data to **make iterative improvements,** setting the stage for continuous growth and long-term success.

CHAPTER 1

Why invest in driver coaching?

In this chapter:

- Risky and inefficient driving behaviors add up.
- Coaching is proven to increase safety and efficiency.
- Coaching can be tailored to fit the size & scale of your operations.



Risky and inefficient driving behaviors add up.

Risky and inefficient driving behaviors cost organizations millions of dollars per year, while good driving practices can save money and make the road a safer place. Coaching drivers on the riskiest and most expensive driving behaviors is essential for organizations that want to improve safety and efficiency.

What are the riskiest driving behaviors?

Speeding

For more than two decades, **speeding** has been involved in approximately [one-third](#) of all motor vehicle fatalities. Speeding infractions can also lead to losing a CDL or increase individual driver insurance rates.

Distracted driving

The [#1 risky behavior](#) correlated with crashes is **distracted driving**. [3,142](#) people died in distraction-affected crashes in 2020.

Tailgating

Tailgating is the leading cause of [rear-end collisions](#), which cause 1,700 deaths and 500,000 injuries per year. Following too close also impedes a driver's ability to slow down and avoid a highway collision.

What are the most expensive driving behaviors?

Idling

6 billion gallons of gasoline and diesel are wasted every year due to [vehicle idling](#). In fact, every 1 MPH over 55 MPH costs 0.1-0.2 MPG in **fuel economy**. For 10 trucks, each traveling 100,000 miles every year, the extra fuel cost could be over [\\$127,000](#).

Harsh acceleration & harsh braking

Hard accelerations and **hard braking** can lower gas mileage [15-30%](#) on the highway and 10-40% in stop-and-go traffic. Eco driving (steady speed and gradual acceleration/deceleration) can improve actual fuel efficiency by [17%](#).



Coaching is proven to increase safety and efficiency.

Investing in driver coaching can have a widespread positive impact across your organization. Here are just a few of the ways organizations have benefitted from their investments in driver coaching.

Improved organizational culture.

[DHL's Supply Chain and Express Divisions](#) reduced driver turnover by 50% by personalizing coaching and building a culture of transparency and recognition.

Safer drivers.

[The City of Memphis](#) reduced distracted driving by 70% by not only providing feedback on driving behaviors, but also incentivizing drivers with a new Safe Driving Awards program.

Reduced incidents.

[Univar](#) reduced harsh incidents across their fleet by 40% by using dash cam footage to provide context in coaching conversations when incidents occur.

Improved fuel efficiency.

[The City of Sacramento](#) cut fuel consumption by 6% across their entire fleet by using fuel and idling reports to inform coaching.

Reduced turnover.


[Kreilkamp Trucking](#) decreased driver turnover by 20% in one year by building a Distracted Driving Prevention Program and prioritizing a culture of safety.

Lower insurance premiums.

[Fralely & Schilling](#) reduced insurance costs by 36% from 2020 to 2023 by implementing a driver performance scoring system to gamify safety improvements.

Lower legal costs.

[The Rasmussen Group](#) saved \$2.6 million in legal expenses and loss exposure due to improvements in driver behaviors.

A woman with long dark hair, wearing a white long-sleeved shirt and an orange safety vest, is standing next to a truck. She is looking down at a device in her hands. The truck's door is open, and the interior is visible. The background shows a clear blue sky and the side of the truck.

“Our drivers check the safety leaderboard every minute of every day. It motivates lower-performing drivers to seek out coaching and keep pace with their peers.”

Jason Wurster, Senior Branch Manager, RelaDyne

Coaching can be tailored to fit the size, scale, and type of your operation.

How does the size and type of your operation affect coaching?

Small and medium organizations.

If you have fewer resources to dedicate to extensive coaching programs, prioritize in-cab coaching to empower drivers to self-coach on the road to maximize your coaching reach. AI-based voice coaching and self-coaching can be especially effective for smaller organizations that want to make impactful coaching improvements without exhausting resources or bandwidth.

Enterprise organizations.

If your organization has more resources to dedicate to coaching, you can focus on implementing standardized coaching workflows, standardized coaching workflows and in-cab coaching, both built to scale. As you create your program, prioritize systems that can identify the riskiest drivers and coach hundreds or thousands of drivers efficiently. AI-based voice coaching can also be effective to coach thousands of drivers without exhausting coaching resources. Coaching programs at this level can also zero in on specialization, focusing on specific roles or types of equipment.

Type of fleet.

Every fleet requires a tailored approach to coaching, and it's important to consider these unique needs early. Below are some examples of how different types of fleets may personalize their approach to driver coaching.

- **Construction:** These operations demand proficiency in navigating heavy equipment and off-highway vehicles through rough terrain and tight spaces, and may require specialized coaching for different procedures.
- **Field services:** These operations involve a lot of start-and-stop driving, and may require specialized coaching on safe procedures with customer service and interaction. Since some of these drivers may not be required to have CDLs, they may need additional coaching.
- **Long-haul:** These drivers face extended periods on the road and must be skilled in fatigue management and defensive driving. Since these drivers don't regularly return to their depot or headquarters, in-person coaching opportunities may be less frequent.
- **Hazmat:** Drivers transporting hazardous materials require specialized and regular certifications and will need unique safety and compliance training.
- **Government:** Employees who operate government-owned vehicles may be subject to specific certifications and protocols and require training when entering a restricted area.



CHAPTER 2

Setting up your coaching program for success.

In this chapter:

- [How and when to deploy different coaching methods.](#)
- [Technologies that can help you coach drivers more effectively.](#)
- [Common challenges & tips for successful change management.](#)
- [3 best practices for building a coaching program that will last.](#)



How and when to deploy different coaching methods.

Understanding the differences between coaching methods—and knowing when to use them—ensures that drivers receive the type of coaching they need, when they need it most. Use this guide to understand the pros, cons, and best practices for different types of coaching.



1-to-1, manager-led coaching.

Definition	A conversation between an individual driver and a coach.
Pros	<ul style="list-style-type: none"> • Highly personalized and contextual • Private to each driver • Personal 1-to-1 interaction
Cons	<ul style="list-style-type: none"> • Best deployed in combination with other types of coaching that are more scalable
When to use	<ul style="list-style-type: none"> • In sensitive situations where privacy is needed • If you are coaching on repeated behaviors or particularly risky behaviors • When corrective actions are being discussed

1-to-many, manager-led coaching.

Definition	A meeting between many drivers and coaches. This type of coaching can come in many forms—such as a monthly safety meeting or coaching committee.
Pros	<ul style="list-style-type: none"> • Efficient for communicating the same information to many drivers at once • Opportunity to acknowledge and celebrate drivers in front of their peers • Fosters a positive culture of safety • Can provide an opportunity to celebrate positive driving examples
Cons	<ul style="list-style-type: none"> • Can be challenging to bring everyone together, so may be less frequent • Should not be used to coach individuals or share sensitive information
When to use	<ul style="list-style-type: none"> • Onboarding new drivers • Training drivers on new policies or procedures • Fostering open discussions on shared experiences and learnings

In-cab coaching.

Definition	Real-time feedback delivered to drivers while they are on the road, often in the form of in-cab alerts via dash cams.
Pros	<ul style="list-style-type: none"> • Preventative coaching before an incident occurs • Private to driver • Scalable • Gives drivers opportunities to self-correct behavior before speaking with a manager
Cons	<ul style="list-style-type: none"> • Less personal than 1-to-1 human interaction • Works best when paired with manager-led coaching & recognition
When to use	<ul style="list-style-type: none"> • Always on, to proactively coach drivers while they're on the road • For long-haul drivers and trips, and for drivers that don't return to the depot frequently • For safety managers who oversee many drivers

Self-coaching.

Definition	Drivers self-review incident footage and complete self-coaching workflows before returning to a depot for a coaching session with a manager.
Pros	<ul style="list-style-type: none"> • Enables timely feedback • Private to driver • Scalable • Empowers drivers to self-correct behavior before speaking with a manager
Cons	<ul style="list-style-type: none"> • Less personal than 1-to-1 human interaction • Works best when paired with manager-led coaching & recognition
When to use	<ul style="list-style-type: none"> • Best for less serious behaviors and incidents • For long-haul drivers and trips, and for drivers that don't return to the depot frequently • Can be implemented to empower drivers to take more ownership of their safety journey

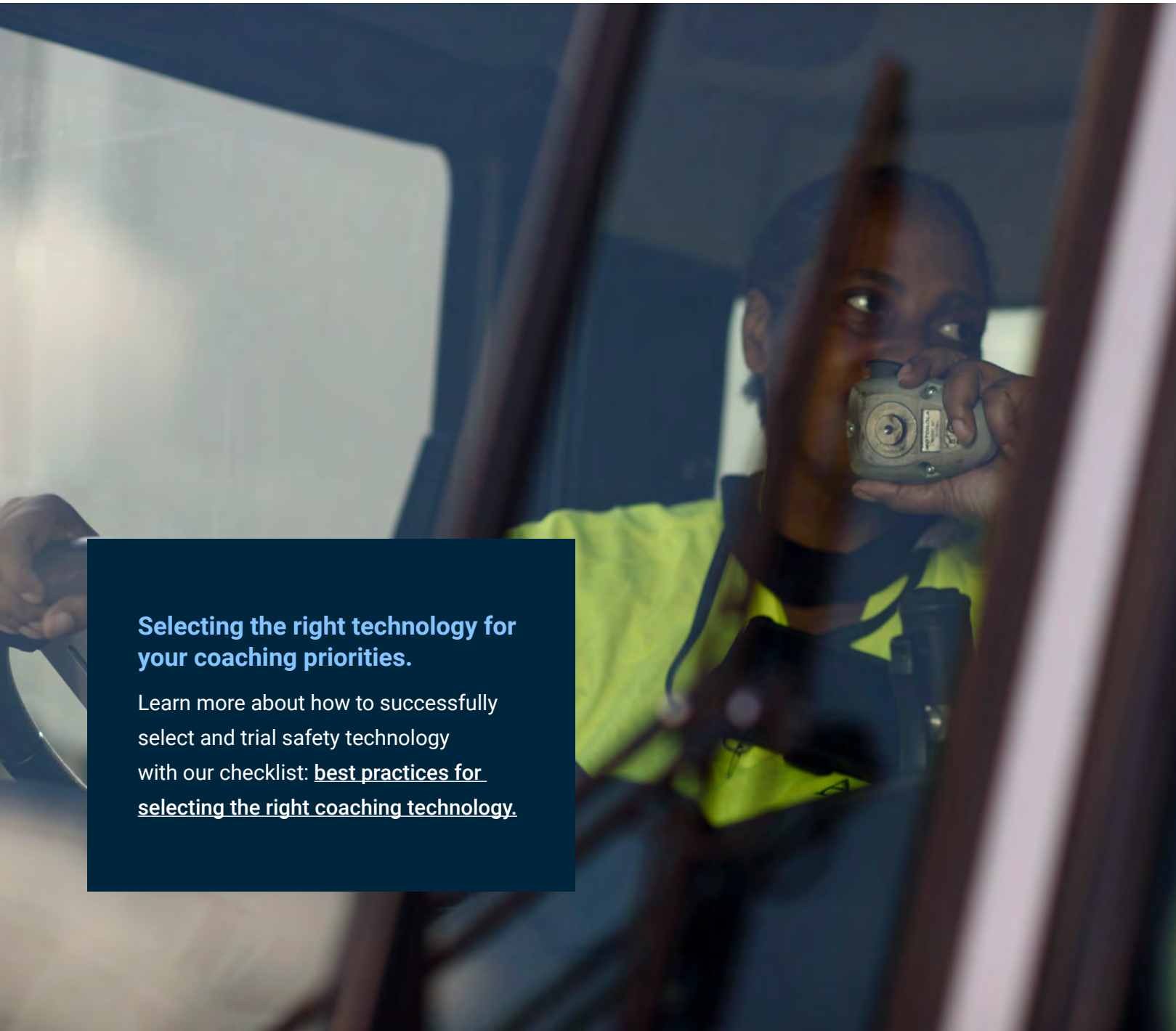
Peer-to-peer coaching.

Definition	Drivers share learnings, tips, or best practices with each other—via either informal settings (such as conversations in break rooms) or formal settings (such as an official mentorship program).
Pros	<ul style="list-style-type: none"> • Creates professional growth opportunities for seasoned driver-coaches • Can be a less formal, open, and authentic environment • Creates space for drivers to share their learnings with peers • Fosters a positive culture of safety (builds driver morale)
Cons	<ul style="list-style-type: none"> • Requires commitment from more experienced drivers to be coaches/peer mentors
When to use	<ul style="list-style-type: none"> • Onboarding new drivers who need additional training or coaching • To build community and engagement among drivers



Technologies that can help you coach drivers more effectively.

Technology can greatly improve coaching consistency and efficacy, resulting in a safer and more efficient organization. In fact, the National Surface Transportation Safety Center for Excellence ([NSTSCE](#)) found that driver coaching used in combination with video telematics and dash cams can result in a 52% decrease in safety-related events.



Selecting the right technology for your coaching priorities.

Learn more about how to successfully select and trial safety technology with our checklist: [best practices for selecting the right coaching technology.](#)

Devices

- **AI-powered dash cams:** Forward-facing and/or dual-facing internet-connected dash cams that use artificial intelligence (AI) to automatically detect risky behaviors in real time, and upload footage to the cloud. AI-powered dash cams can provide feedback to drivers on the road, helping prevent incidents before they happen and making coaching more scalable. These dash cams can also streamline safety event video retrieval to exonerate drivers from false claims.
- **Exterior auxiliary cameras:** Exterior cameras mounted to the side or rear of the vehicle to capture a 360° view of the vehicle and surrounding road. Exterior cameras can capture what drivers might miss, improving visibility in the event of a back up incident, sideswipe, or property damage.
- **Vehicle-based telematics data:** Telematics devices can offer data on speed, g-force, GPS location, and more—providing additional insight into driver safety. When combined with dash cam footage, telematics data can give you a full picture of a safety event.

AI technology

- **AI-detected safety events:** Camera technology has advanced greatly over the last decade, and edge computing now allows for AI to streamline cloud-based event review by automatically detecting and labeling risky driving behaviors for video-based safety events.
- **AI-based, in-cab coaching technology:** Through AI-powered dash cams, built-in audio speakers enable coaches to deliver in-cab alerts to give feedback as risky driving behaviors are detected through AI-detected safety events. This real-time coaching helps shift coaching opportunities from reactive to proactive.

Software

- **Digital coaching tools:** Digital workflows that make it easier to identify coaching opportunities, have video-based coaching conversations with drivers, and document those coaching conversations to ensure accountability. Coaching workflows can help improve coaching consistency and equity across your organization.
- **Simulation software:** Virtual training software, including augmented reality and virtual reality simulators, that give drivers a safe virtual environment to practice and implement improvements from coaches.
- **Mobile apps:** Apps that can integrate coaching and remote support into mobile workflows to give drivers access to event footage, expert-led training video courses, compliance scores, performance insights, and troubleshooting support from their back office team.
- **Open API-based solutions:** An open platform with API and webhooks support that enables seamless and real-time data aggregation. This comprehensive visibility into driver performance can enable more proactive, informed feedback and the ability to effectively identify trends and opportunities for personalized coaching.

Common challenges & tips for successful change management.

Change management is key to building a successful driver coaching program—especially if you’re implementing new technology, such as dash cams, for the first time. In a [2022 survey](#), Together for Safer Roads found that **70% of drivers equipped with in-cab technology found all forms acceptable** after using the technology with the right change management. Here are six of the most common challenges organizations encounter with driver coaching—and best practices for navigating each.



1. Driver buy-in.

Technology like dash cams can make drivers feel unsure about their privacy, job security, and performance.

Best practices:

- **Build trust through transparent communication** about what the technology does and does not do.
- **Design privacy-first policies and restrict access** to footage and data to protect drivers’ privacy.
- **Celebrate positive examples** of defensive driving and exoneration to create a culture of safety.

More tools for building driver buy-in.

1. Download our checklist for securing driver buy-in [here](#).
2. Government fleets can find tips specific to their unique needs in this [on-demand webinar](#).

2. Union buy-in.

If your organization employs union drivers, gaining the support of the union is crucial to the success of your coaching program.

Best practices:

- **Showcase coaching technology as a tool for safety and career growth**, not punishment or job loss.
- **Create open dialogue with union representatives and stewards** to gain trust.
- **Start with a pilot phase** and build feedback loops into the process.
- **Work with union leaders to develop clear policies** that specify when drivers can be coached and how privacy will be upheld.

3. Lack of visibility.

Unless you are conducting a ride-along, you may not know the exact challenges your drivers face in the cab and on the road—or their unique habits—making it difficult to personalize coaching.

Best practices:

- **Identify proactive coaching opportunities** for high-risk drivers by getting visibility into leading risk indicators from insights and reports.
- **Get a more complete picture** of what’s happening on the road and inside the cab by combining telematics data with dash cam footage.
- **Surface risk trends quickly and protect drivers** by setting up alerts for specific safety events, so you have visibility into what matters while protecting drivers’ privacy.
- **Give visibility to those who need it most** by giving key stakeholders permissions and access to safety event footage.



4. Unbiased assessment.

Without the right tools, assessing driver performance can be highly subjective due to the lack of context. It often depends on spotty reports, occasional ride-alongs, or unreliable third-party observations.

Best practices:

- **Anchor feedback on objective data**, like safety scores, event footage, or idling reports, to ensure that your assessment is unbiased.
- **Standardize your coaching approach** to ensure that drivers across the organization receive the same coaching experience for the same incidents or behaviors.

5. Uncovering concerning driving behaviors.

Often, issues that need coaching are not evident until they become significant problems.

Best practices:

- **Pay attention to leading indicators** such as speeding, distracted driving, and harsh braking.
- **Look for trends or patterns in driving behaviors** that are surfacing across your organization to identify which behaviors have the highest risk of negative impact.
- **Analyze repeat incidents** to discover coaching gaps and opportunities.

6. Personalized coaching at scale.

Coaching needs to be personalized to be effective—but it can be challenging to have regular, one-on-one coaching conversations with hundreds or thousands of drivers across an organization.

Best practices:

- **Provide personalized feedback to drivers on the road** by using AI-powered coaching technologies, such as in-cab alerts.
- **Create specialized and localized coaching** for drivers in different regions or with different responsibilities.
- **Train drivers on safety skills** with expert-led videos and courses that are curated towards their risky habits.

3 best practices for building a coaching program that will last.



Dive deeper on program design

Want to learn more about introducing video and vehicle telematics to improve driver performance — including detailed implementation tips? Check out our in-depth guides:

- [Best Practices for Building a Video-Based Safety Program](#)
- [How to Build a Fuel Efficiency Program](#)

1. Try a beginner, intermediate, and advanced approach.

- **Beginner:** It's important to choose a technology partner that allows you to enable features in stages, so as not to overwhelm drivers. Once you have chosen your technology partner, begin by having event detections enabled — so your coaches start to get visibility into safety events—but don't enable in-cab voice coaching yet.
- **Intermediate:** Once the basics are covered, start integrating advanced features like in-cab alerts for distracted driving or speeding. For some organizations, in-cab audio alerts can be particularly effective, as they can alert drivers in real time about safety hazards— but these advanced features should be rolled out incrementally. You can also introduce app-based safety scores to share transparent reporting with drivers.
- **Advanced:** Finally, scale your workflows by standardizing coaching policies across your organization and create new organizational safety initiatives based on AI-driven safety insights. Find opportunities to bring your safety initiatives into other driver initiatives, such as driver rewards and recognition.

2. Integrate with current workflows and culture.

- **Ensure a seamless transition:** Prioritize operating models that can easily integrate with your current systems and workflows. Consider peer mentorships and regular trainings to streamline education and adoption, and introduce coaching technologies early on during new driver onboarding.
- **Set coaches and managers up for success:** Provide training early for coaches, managers, and any relevant stakeholders, ensuring that your teams feel prepared to lead.
- **Drive buy-in from the ground up:** Invite your seasoned drivers to champion your safety initiatives, and build a committee of driver peers to influence newer drivers.

3. Choose specific metrics to measure.

- **Risk score/safety score:** Train drivers on safety skills with expert-led videos and courses tailored to address their specific risky habits.
- **Efficiency score:** An efficiency score evaluates how efficiently a driver operates the vehicle, measuring fuel consumption, idle time, and route efficiency. This score can help you identify drivers that may need coaching on idling, harsh braking, or other inefficient behaviors.
- **Feedback from key stakeholders:** Regularly survey drivers, coaches, and safety managers to understand what is working well and what needs to be improved. These feedback loops are critical to maintaining a positive culture where concerns are heard and addressed.

CHAPTER 3

Building effective coaching workflows.

In this chapter:

- 4 key factors to consider when building your coaching processes & policies.
- Behavior influence framework: What makes coaching effective?
- Sample coaching workflow: Respond to safety events consistently & effectively.
- Worksheet: 6 steps to having effective coaching conversations.
- Worksheet: How to prepare for 4 common coaching scenarios.



4 key factors to consider when building your coaching processes and policies.

1. Timeliness | When to coach drivers.

Post-event reviews: After a risky behavior or significant event like an incident or a near-miss, immediate coaching is crucial to prevent another incident.

Routine check-ins: Regular, scheduled coaching sessions empower drivers to address smaller issues before they escalate.

Proactive coaching: This involves spontaneous, on-the-spot coaching moments, sometimes delivered through in-cab technology or during brief pit-stops.

2. Effectiveness | How to coach drivers.

Context matters: Always provide context for your coaching. Use data or specific examples to clarify your points.

Focus on skill gap analysis: Identify the gap between the existing skills and the skills that the driver needs to master. Tailor your coaching to bridge this gap.

Follow up and review: Coaching is an ongoing process. Make sure to schedule follow-up sessions to track progress and adjust strategies as needed.

3. Consistency | How to ensure equity & consistency.

Group training: Host seminars or workshops focusing on common issues, best practices, or new industry regulations.

Peer-to-peer coaching: Give experienced drivers a platform to share their best practices and learnings with less experienced drivers. This fosters a positive culture of recognition while empowering drivers to learn from their peers.

In-cab coaching: Give drivers the opportunity to self-correct risky behaviors before speaking with a manager through real-time, in-cab alerts. If the behavior continues, then proceed to 1:1 manager-led coaching.

Consistent approach: Identify the most common risky behaviors across your organization and standardize consistent video-based coaching processes and policies to address them.

4. Corrective actions | How to address recurring challenges.

High-risk driver programs: Implement special coaching programs and consequences for drivers who frequently engage in risky behavior.

Data aggregation: Use collected data to identify patterns of repeat risky behaviors across the organization. This can inform more targeted, scalable coaching interventions.

Clear policies & procedures: Create a clear process for disciplinary action that outlines what behaviors and incidents will result in training, coaching, and/or progressive discipline. Clearly communicate these policies and procedures to keep drivers informed and prepared with consistent and fair coaching.

BEHAVIOR INFLUENCE FRAMEWORK

What makes coaching effective?

In his widely-cited report [“Influencing Behaviors for Better Safety Performance.”](#) Keith Robinson, Corporate Safety Director at Civil & Environmental Consultants, Inc., proposes an actionable framework for understanding what types of consequences—both positive and negative—are most effective in influencing behavior.

3 factors that determine the efficacy of consequences:

1. TIMING | Soon (S) vs. Later (L):

A consequence which follows soon after a behavior is stronger than one which occurs later.

2. CONSISTENCY | Certain (C) vs. Uncertain (U):

Consequences that are delivered consistently after a behavior are stronger than those that are uncertain or unpredictable.

3. SIGNIFICANCE | Positive (+) vs. Negative (-):

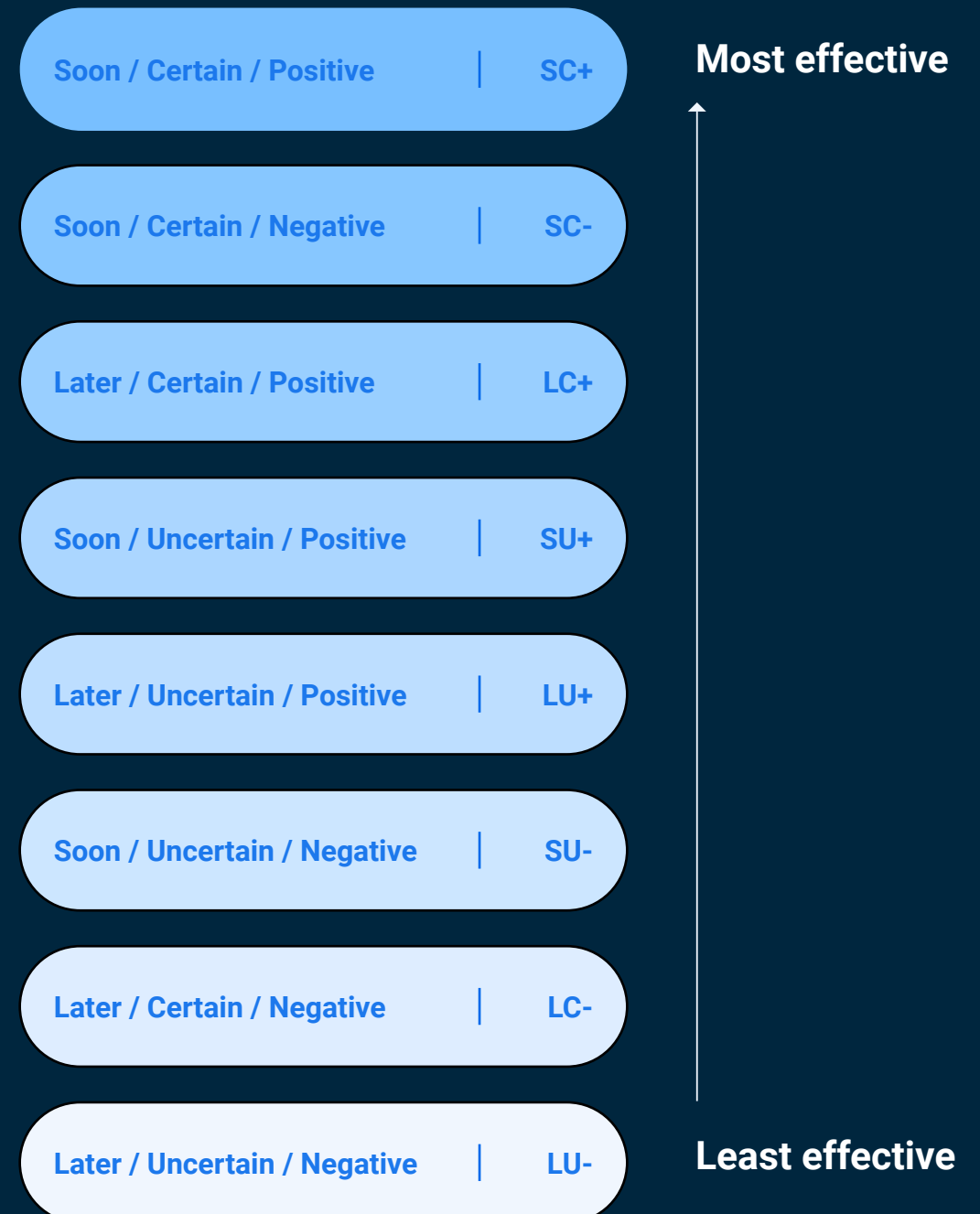
Positive consequences are stronger than negative ones.

Apply this framework to influence driver behavior effectively.

The most effective consequences are **soon** (they occur shortly after the behavior), **certain** (consistently given), and **positive** (celebrating or reinforcing safe behavior). For example:

- Communicate to drivers that all speeding violations will result in manager-led coaching 24-48 hours after an incident, and recognize drivers who obey the speed limit in front of their peers to positively reinforce the behavior.
- Following a harsh brake incident to avoid a crash, meet with the driver and acknowledge the positive example of defensive driving. Then, with the driver’s permission, share footage of the incident with other drivers to celebrate the safe behavior.

The most effective consequences are soon, certain, and positive.



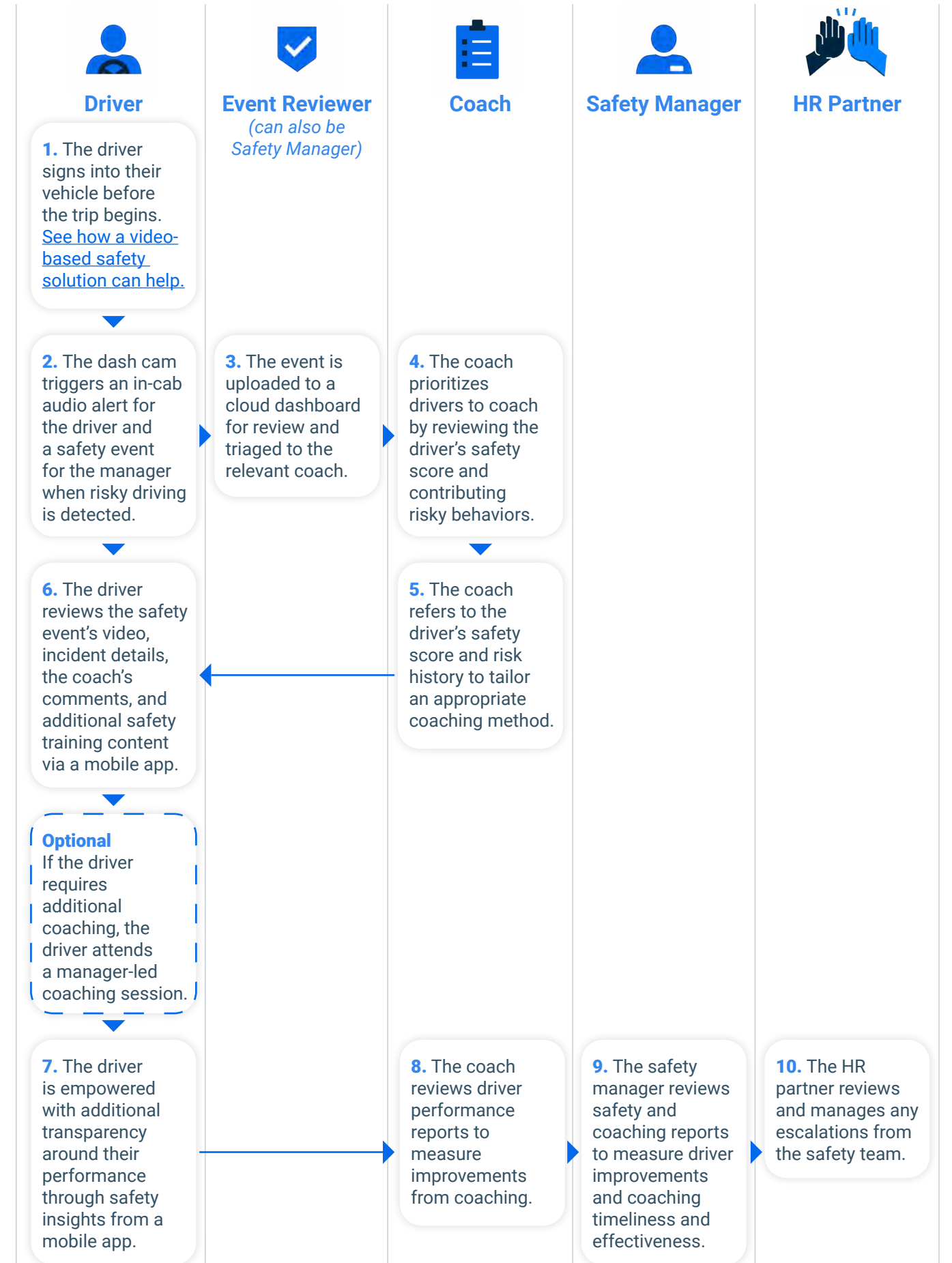
SAMPLE COACHING WORKFLOW

Respond to safety events consistently & effectively.

Establishing a coaching workflow from the ground up can be challenging. A consistent process with clear roles and responsibilities is key to building effective and sustained success. That's why it is important to have a documented workflow for what happens next at any stage of the coaching journey.

This sample workflow is a helpful starting point. You can customize it to align with your organization's unique structure and needs.

Follow our recommended coaching workflows, from driver assignment to manager-led and virtual coaching, to streamline and scale your coaching process. Learn more about how to build a proactive driver coaching program [here](#).



WORKSHEET

6 steps to having effective coaching conversations.



1. Identify who to coach.

- ❑ **Determine which behaviors are red flags that require immediate action**, like speeding or distracted driving.
- ❑ **Determine which behaviors signal poor driving behavior and require less immediate, continued coaching**, like following distance and harsh braking.
- ❑ **Decide which behaviors are relevant for the drivers in your organization**, as these may differ depending on the type or location or driving.
- ❑ **Analyze driving trends across your organization** to uncover opportunities for group trainings and behavior-specific programs.

2. Prepare for a coaching session.

- ❑ Coach in a timely manner and **prioritize coaching for severe behaviors within 24-48 hours**.
- ❑ Confirm driver's receptivity by **asking the driver for permission to provide feedback**, ensuring they're open to coaching.
- ❑ **Determine the coaching format**: manager-led coaching, in-cab coaching, self-coaching, peer coaching, or a mix.
 - ❑ If the driver needs to be coached on multiple incidents, **consider the driver's learning style** and tailor the session to either coach on all behaviors at once or one behavior at a time.
- ❑ For a manager-led session, **confirm with the driver that they will be available**, rested, and receptive to the scheduled coaching session.
- ❑ **Focus on objective facts and incident footage**—as well as basic information such as speed, location, weather, vehicle type, and previous session notes—to ensure unbiased coaching.
- ❑ **Consult another coach** or safety professional for additional perspectives as needed.
- ❑ **Plan your questions and conversation starters** to avoid defensive reactions. Prepare for strong reactions and have a response strategy.

"[Drivers] are able to get timely feedback that helps them better recall the situation they were in... They have the opportunity to immediately adopt the coaching for the next segment of their trip."
Terry Kin, Chief Information Officer, All Aboard America

3. Build trust and mutual respect.

- ❑ **Greet the driver warmly and respectfully** as soon as you meet and set a friendly tone.
- ❑ **Show active listening** with nods, eye contact, etc., to show you're fully engaged.
- ❑ **Acknowledge the driver** for their willingness to participate and for their time commitment.
- ❑ **Commend the driver for any safe driving habits** or actions they've displayed.

4. Coach and build process.

- ❑ **Ask the driver for their own assessment** of the incident in question, allowing them to critically self-reflect.
- ❑ **Have the driver view the incident footage** and any objective evidence, giving them an opportunity to share their perspective.
- ❑ **Ask the driver about any external factors** affecting the incident, and ask the driver how they would correct the root cause or how the organization can help them do so.
- ❑ **Select the right coaching approach.** Find examples of coaching approaches in our worksheet: [How to prepare for 4 common coaching scenarios.](#)
- ❑ **Clearly outline the risks** of continuing unsafe or inefficient behavior.
- ❑ **Be consistent in the actions taken** and communicate this consistency to the driver.
- ❑ If the driver becomes defensive, **guide them back to the coaching topic.**
- ❑ **Document everything**, including the root cause, next steps, and any positive recognition to keep a formal record.
- ❑ **Obtain acknowledgement of the coaching session from both coach and driver**, confirming alignment and providing a formal record of the session.

[All Aboard America](#) used dash cam footage to customize coaching for each driver with examples from their own trips. Now, 90% of their drivers have a Safety Score of 90 or higher.

5. Ensure driver commitment.

- ❑ **Obtain the driver's commitment to correct risky behaviors** and agree on follow-up actions.
- ❑ **End on a positive note** and acknowledge the driver. Make sure they know you're available for future discussions.
- ❑ **Schedule regular follow-up sessions** to review progress and reinforce commitments.
- ❑ **Consider pairing the driver with an accountability partner** within the organization to help keep them on track.
- ❑ **Launch a rewards program** to encourage ongoing safe behavior. Consider public recognition in team meetings, gift cards, or awards.

[Chalk Mountain Services](#) achieved a 15% improvement in driver retention by rewarding and celebrating good driving behaviors.

6. Improve your coaching program with data.

- ❑ **Analyze and segment organizational data** to identify locations, departments, and regions where coaching is especially effective or lacking.
- ❑ **Measure performance trends weekly** and look at both individual and organization-wide trends to measure progress toward overall safety goals.
- ❑ **Regularly evaluate your coaching performance metrics**, including efficacy and promptness, to understand its impact and areas for improvement.
- ❑ Based on your evaluations, **make regular adjustments** to improve your coaching program's effectiveness.



WORKSHEET

How to prepare for 4 common coaching scenarios.

Speeding | First incident.

Sample data:

Tenure: New driver, <90 days

Average safety score: 90

Scenario: First-time speeding at 63 MPH in a 55 MPH zone

Recommended type of coaching:

In-cab coaching plus **self-coaching** for first-time or less severe incidents, like low to moderate speeding, to encourage the driver to self-correct the risky behavior.

Preparation:

- **Review the driver's safety history**, including footage, speed, location, and time.

Coaching session:

- **Automatically alert the driver** of the risky behavior in real-time to help them self-correct before an incident occurs.
- **Share incident details**, including behavior or event specifics, and outline the risks of speeding.
- **Ask the driver to review the footage** and acknowledge the speeding offense, agreeing to adhere to speed limits in the future.
- **Acknowledge and agree with the driver's assessment** and acknowledge them for their time and honesty.
- **Issue a warning and document the session** before obtaining driver acknowledgement for the record.

Rolling stop | Second incident.

Sample data:

Tenure: >3 years

Average safety score: 80

Scenario: Second rolling stop in the past month, occurred at a customer site

Recommended type of coaching:

Self-coaching plus **1-to-1, manager-led coaching** for a second offense of the same behavior that was not corrected through self-coaching alone.

Preparation:

- **Review the driver's safety history**, including footage, speed, location, and time.

Coaching session:

- **Share incident details virtually** through emails or messages, including behavior or event specifics.
- **Ask the driver to self-review the footage** virtually and acknowledge the offense, agreeing to stop completely at marked stop signs in the future.
- Given the repeat offense, **schedule an in-person session** to discuss risks and corrective actions in detail.
- **Engage in an in-person, in-depth conversation** about the seriousness of repeated offenses and corrective actions needed.
- **Acknowledge the driver for their time and commitment to safety**, remind them of previous warnings, and **assign optional training content or sessions to complete before their next trip**.
- **Document the entire coaching process** and obtain driver acknowledgment for your official record.

Tailgating or near miss | Repeated trend.

Sample data:

Tenure: 10 months

Average safety score: 70

Scenario: 3 incidents of tailgating or near misses in the last 3 months

Recommended type of coaching:

Self-coaching plus **1-to-1, manager-led coaching** and **additional driver training** for repeated offenses of the same behavior that was not corrected through virtual and in-person coaching.

Preparation:

- **Review the driver's safety history**, including footage, speed, location, and time.

Coaching session:

- **Share incident details virtually** through emails or messages, including behavior or event specifics.
- **Ask the driver to self-review the footage** virtually and acknowledge the offense, agreeing to stop completely at marked stop signs in the future.
- Given the repeat offense, **schedule an in-person session** to discuss risks and corrective actions in detail.
- **Engage in an in-person, in-depth conversation** about the seriousness of repeated offenses and corrective actions needed.
- **Acknowledge the driver for their time and commitment to safety**, and remind them of previous warnings, and **assign required training content or sessions to complete before their next trip**.
- **Document the entire coaching process** and obtain driver acknowledgment for your official record.

Harsh brake to avoid a crash | Recognition.

Sample data:

Tenure: 15 years

Average safety score: 95

Scenario: 0 incidents on record, harsh brake to avoid a crash when cut off by another vehicle.

Recommended type of coaching:

Self-coaching plus **1-to-many, manager-led coaching** to champion and recognize defensive driving habits with peer drivers.

Preparation:

- **Review the driver's safety history**, including footage, speed, location, and time.

Coaching session:

- **Virtually send or share details of the incident**, explicitly recognizing the driver for their alertness and skillful maneuver to avoid a crash.
- **Acknowledge the driver's action** the next time you meet in person, such as during a monthly driver meeting or in a driver newsletter.
- **Mark the incident as an example of defensive driving** and document the positive feedback for the official record.

Ready to partner with a world leader in coaching technology?

From the road to the job site, Samsara offers comprehensive safety solutions to keep your drivers and workers safe. Learn more about how Samsara can help you improve safety across your operations.

[Learn more](#)

“Samsara truly helps our drivers be even better at their job—protecting them and the company at the end of the day.”

David Serach, Director of Safety, Chalk Mountain Services
2022 Safest Operator Award, Connected Operations Award



CHECKLIST

Best practices for selecting the right coaching technology.

Technology can be incredibly helpful in coaching drivers consistently and effectively. Selecting the right technology partner requires thoughtful consideration and preparation. Here are some tips for navigating a technology trial—and setting up your coaching program for success.



1. Establish clear and measurable goals.

- **Identify pain points you want to solve for.**

For example:

- Inefficient or ineffective driver coaching
- High incident-related costs
- Low driver safety scores

- **Define clear objectives for your program.**

For example:

- Coach drivers in a timely and effective manner
- Address risky behaviors as they happen
- Improve driving behaviors across your organization

- **Create clear goals for your technology provider.**

For example:

- Drive 90% adoption of safety technology features in the first three months
- Receive timely and effective customer support from the technology provider

- **Define the change taking place during the trial.**

For example:

- Technology, process, and policies that will change during the trial.

2. Identify your success criteria.

- **Create clear success criteria for the technology.**

For example:

- Reduce time to coaching from 1 week to 48 hours after an event with data
- Coach drivers in real-time through in-cab alerts
- Improve average safety scores by 15% in the first six months

- **Establish your must-have features.**

For example:

- Coaching reporting insights
- In-cab audio alerts
- Driver performance reports

- **Validate technology partners and solutions with ROI in mind.** Look for case studies and testimonials from organizations similar to yours, and ask any potential technology partner about the tangible ROI these organizations have achieved with their coaching solution.

3. Execute & monitor a trial.

- **Establish an achievable timeline for a technology trial.**
 - Recommendation for large organizations of 100+ vehicles: 90 days
 - Recommendation for small/medium organizations of less than 100 vehicles: 30 days
- **Determine who will trial the technology.**
 - **Trial drivers:** A group of drivers—often in the same location—who can trial the technology and provide feedback on ease-of-use.
 - **Trial admins:** A group of managers who can review safety events, coach risky driving behaviors, and provide feedback on effectiveness.
 - **Trial executive sponsor:** An executive who can assess feedback and success criteria and make a decision about the technology.
 - **Set up feedback loops** and check-ins with trial group members regularly.
 - **Send out communications and roll out the new technology.**
 - **Monitor improvements, collect feedback, and address any ongoing challenges** during the trial.

4. Assess success criteria.

- **Review objectives and success criteria and compare to trial outcomes.** Ex. Trial admins saw a reduction in mobile usage as a result of in-cab alerts.
- **Create an executive summary presentation** with the technology provider team to recap findings for internal stakeholders.
- **Identify power users to become change champions** for the broader rollout.
- **Host an alignment meeting** for trial decision and next steps.





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