

POWERFLEET®

The 90-Day Visibility Gap Self-Assessment

A Field Playbook for On-Site Fleet, EHS, and Operations Leaders

A companion resource to the
Powerfleet Field Report, June 2026

Why this playbook exists

Most safety programs in industrial operations today get things right on paper. The pre-use checklist exists. The operator certifications are current. The audit binders are in order. And the numbers (damage, near-misses, recordable incidents) haven't moved much or have crept the wrong way.

That gap, between what the paperwork shows and what the floor knows, is the visibility gap. It is the single most consequential operating issue in industrial safety today, and it is not a technology problem. It is a leadership and operating cadence problem that technology can help solve, but only after the leader has done the work to see the gap clearly.

This playbook is that work. Ninety days of structured observation, reflection, and planning that will let you see your operation more honestly than any audit or report will.

If, at the end of 90 days, you decide the work warrants investing in technology, we'll be here. If you decide the work is an operating cadence change, training, or restructuring of how EHS partners with operations, we'll cheer for that, too. The goal of this playbook is not to sell you anything. It is to help you see clearly.

How to use this playbook

The playbook is organized into three phases. Do them in order.

PHASE 1

The Walk (Days 1–14). Eight questions answered by walking your floor, watching what happens, and asking specific people specific things. This is the active observation phase. Block four hours of floor time per week for two weeks.

PHASE 2

The Pattern (Days 15–45). Reflect on what you saw. Look for what's recurring. Distinguish surface issues from root causes. This phase is mostly desk work, with one or two follow-up floor walks.

PHASE 3

The Plan (Days 46–90). Decide what to do. The playbook provides a prioritization framework and a template for the 30-60-90-day plan that emerges from the assessment.

A note on who should run this

The most common failure mode in floor assessments is that they get delegated to a coordinator, and the leader never personally walks the floor. The eight questions in Phase 1 work because the person answering them is the person who can change the operation. If you are an EHS leader, operations director, or plant manager — this is your work. Don't delegate the walks.

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®



PHASE 1

The Walk

DAYS 1–14

Eight questions, answered by observation

Each question below tells you what to do, what to look for, what to ask, and what the answer means. None of them require purchasing anything. None of them require data you don't already have access to. Some will be uncomfortable to answer honestly. That's how you know you're doing the assessment right.

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®

QUESTION 1 — THE 6 A.M. WALK

What does pre-use checklist completion actually look like at shift change?

What to do

On three consecutive shift changes, be on the floor 15 minutes before the shift starts and stay 30 minutes after. Watch the pre-use inspections happen — or not happen — on at least six trucks. Don't announce yourself in advance.

What to look for

- How many operators complete the full checklist versus signing the bottom and moving the truck?
- How long does the average inspection take?
- What happens when an operator finds an issue mid-checklist? Where does that information go?
- Are the same trucks being signed off by the same operators every shift?

What to ask

Pick one supervisor on the floor. Ask: "***If I picked any inspection from last week, could you tell me who actually did it, on which truck, at what time, and what they found?***" Listen to see whether they can answer with confidence or are reconstructing.

What does the answer mean?

If checklist completion is fast, undocumented, or untraceable, you don't have a checklist program. You have a checklist artifact. The compliance audit will pass. The next incident is already incubating.

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®

QUESTION 2 — THE UNREPORTED EVENT QUESTION

Does your damage report data match your incident report data?

What to do

Pull two reports for the same 90-day period: physical damage costs (racks, products, infrastructure, maintenance) and reported impact events on your forklifts. Lay them side by side.

What to look for

- Total dollar damage versus total reported impacts. Does the math suggest every event was reported?
- Damage clustered in specific areas with no associated reported event in that location.
- Months where maintenance flagged impact-related repairs that don't appear in the incident log.

What to ask

Sit with your maintenance lead and ask: *"**How often do you see damage on a truck that wasn't reported as an event?**"* Then ask your warehouse supervisor the same about racking. The answer that surprises you is the one that matters.

What does the answer mean?

Unreported impacts are not a paperwork problem. They are the cultural signature of a workforce that doesn't believe reporting is safe — for them or for the operator. Every unreported impact is a lost opportunity to coach. Every lost coaching opportunity increases the probability that the next one will be worse.

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®

QUESTION 3 — THE RECURRING-LOCATION QUESTION

Are you tracking where incidents happen, not just how many?

What to do

Take your last 90 days of incident and near-miss reports. Map them physically onto a print-out of your facility layout. Use a different colored pin for each month.

What to look for

- Clusters in specific aisles, intersections, dock areas, or transitions between zones.
- Time-of-day patterns at specific locations.
- Crew or shift patterns at specific locations.

What to ask

Walk your safety committee or floor leads through the map. Ask: "***Why this corner?***" The first three answers will be operational. The fourth answer is usually the real one — layout, visibility, lighting, congestion at shift handoff, a maintenance issue nobody flagged.

What does the answer mean?

If you cannot map incidents to physical locations and time-of-day patterns, your reporting is collecting events without learning from them. The single highest-yield safety investment for most operations is fixing the three physical locations where incidents cluster.

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®

QUESTION 4 — THE OPERATOR-TRUCK MATCH QUESTION

Do you know which certified operator was driving which truck at any given moment in the last 30 days?

What to do

Pick three random truck-by-shift combinations from the last 30 days. Try to answer, from your existing records, exactly who was driving each one at that time. Then, try to verify the operator's certification was current on that date.

What to ask

Ask your training coordinator: "***If I told you operator X drove truck Y at 2 p.m. last Tuesday — how do you verify whether their certification was current?***" The pause before the answer tells you what you need to know.

What to look for

- How much of this is recoverable from your records, and how much is supervisor memory?
- Are certifications tracked in the same system as truck assignments? In the same system as incident reports?
- Is there a process for what happens when a certification lapses and the operator is still scheduled?

What does the answer mean?

Operator-truck attribution is the single most basic foundation of forklift safety, and it is often the most fragile. Without it, you cannot coach behavior, conduct meaningful incident investigations, or defend your program before a regulator.

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®

QUESTION 5 — THE SUPERVISOR CADENCE QUESTION

How often does a supervisor have a coaching conversation with an operator based on something they specifically observed or read in the data?

What to do

Ask three supervisors to log every coaching conversation they have with an operator over a two-week period, including the trigger for the conversation. Don't tell them why you're asking.

What to ask

Ask the supervisors directly: "***In the last month, has anyone asked you to coach an operator on a specific behavior the data flagged?***" If the answer is no, that is your finding.

What to look for

- Volume — how many coaching conversations per supervisor per week?
- Trigger — was it observed behavior, data-driven, incident-driven, or generic?
- Specificity — was the conversation about something the operator did or about general safety awareness?

What does the answer mean?

The visibility data only changes outcomes if a supervisor uses it to have a different conversation with an operator on a Monday morning. If your supervisors aren't running data-informed coaching conversations, no amount of investment in dashboards will change behavior on the floor.

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®

QUESTION 6 — THE DATA-ACTION LOOP QUESTION

When safety data tells you something, how long does it take before something changes?

What to do

Pick three safety findings from the last 90 days — a near-miss trend, an audit observation, a recurring incident type. For each, trace the timeline from when the finding was identified to when a change was implemented on the floor.

What to look for

- The time-to-action.
- Who owned each step of the loop.
- Where the loop stalled — at identification, at decision, at communication, or at implementation.

What to ask

Ask the EHS team: "***How do we close the loop on findings?***" Then ask operations: "How do you hear about EHS findings, and how do you know what to do about them?" Compare the two answers.

What does the answer mean?

Most operations have a data-collection problem; they think it is a data problem. It's actually an action problem. If your loop from finding to floor change is longer than two weeks for most findings, the data is decorative. Shortening that loop is often the highest-leverage change you can make — and it costs nothing.

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®

QUESTION 7 — THE EHS OWNERSHIP QUESTION

Who in your organization is funded and accountable for closing the visibility gap?

What to do

Map the ownership of forklift safety across your organization. Specifically: who owns the budget, the program, the outcomes, and the relationship with operators.

What to look for

- Do all four sit with the same role, or are they fragmented?
- Is there a position whose annual goals include closing the visibility gap, or is the work everyone's responsibility and therefore no one's?
- How is the ownership reflected in the org chart and in compensation incentives?

What to ask

Ask your finance partner: "***What's the line-item budget for forklift safety as a program — separate from the equipment and the training requirements?***" If the answer is "it's distributed across other budgets," that is the finding.

What does the answer mean?

Fragmented ownership is the single biggest predictor of a stalled safety program. The operations we see moving the numbers have a named, funded, accountable program owner — most often inside EHS — with explicit goals tied to leading indicators (checklist completion, near-miss reporting rate, time-to-action) rather than lagging indicators (incident counts).

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®

QUESTION 8 — THE UNANNOUNCED WALK QUESTION

If a regulator walked your floor unannounced at 7 a.m. on a Tuesday, what would they find?

What to do

Walk it yourself, that exact way. 7 a.m. Tuesday. No notice. Do not bring a clipboard. Do not bring a supervisor. Watch as a regulator would watch.

What to look for

- Pre-use inspections in progress, or trucks already moving?
- Hi-vis compliance at the pedestrian gates?
- Speed at intersections and aisle ends?
- Conversations happening on the floor — between operators, between an operator and a supervisor, between a supervisor and EHS?

What to ask

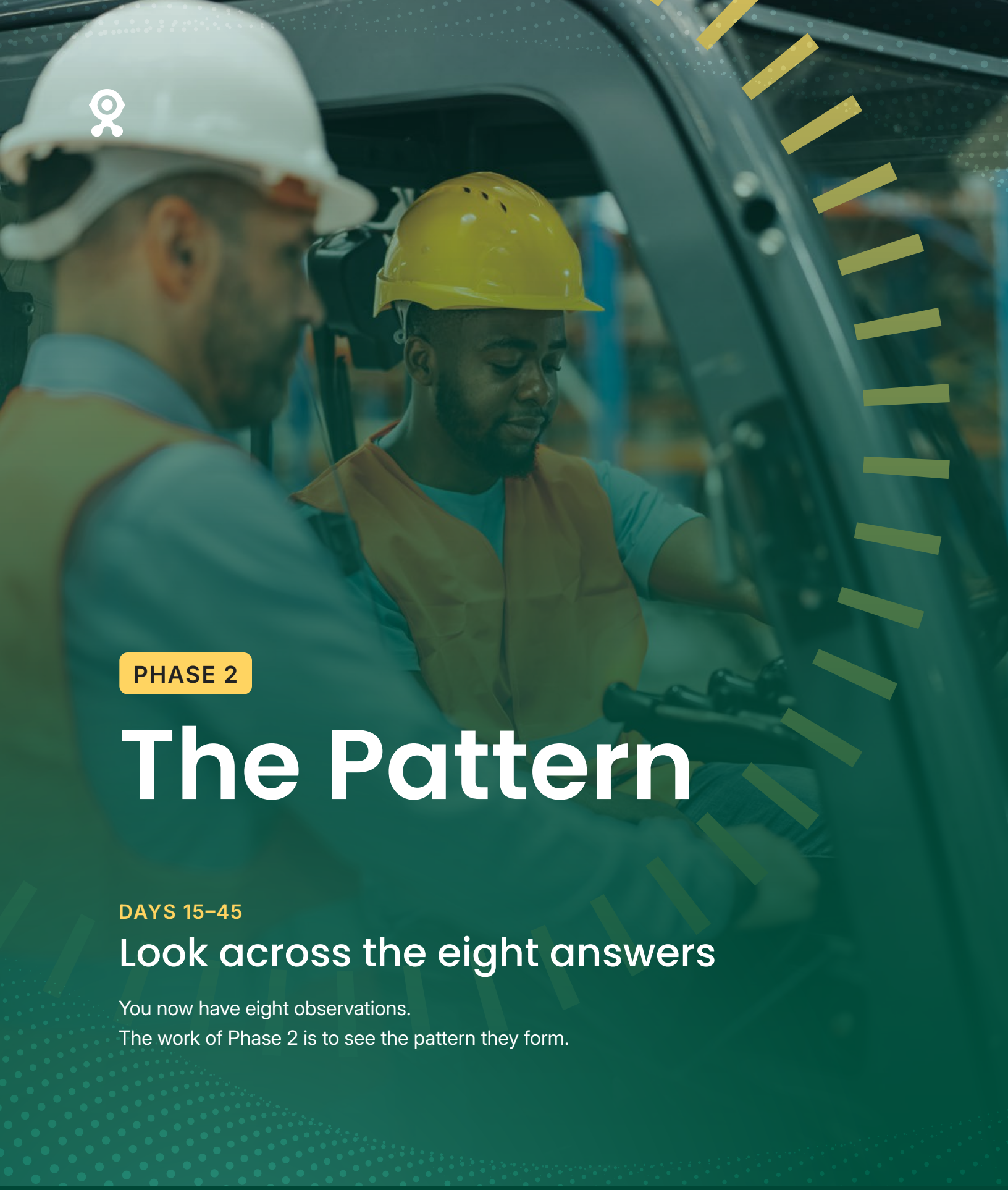
After the walk, write down three things you saw that you would not want a regulator to see. Then ask yourself why they're still there.

What does the answer mean?

The unannounced walk is the closest you will get to seeing your operation as it actually runs. Whatever you write down on that list is your prioritized action plan. Everything else can wait.

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®



PHASE 2

The Pattern

DAYS 15–45

Look across the eight answers

You now have eight observations.
The work of Phase 2 is to see the pattern they form.

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®

Step 1

Lay the eight findings on a single page.

Force yourself to write each finding in one sentence.

Step 2

Sort them into three categories:

Operating cadence findings
How work flows, how meetings run, how information moves.

Cultural findings
What people believe is safe to report, what gets coached, what gets ignored.

Infrastructure findings
Physical layout, equipment age, technology gaps, system fragmentation.

Step 3

1. What is the cheapest thing I can change that would move this finding?
2. What is the most expensive thing I can change that would move it?
3. What change am I keeping deferred because it requires a hard conversation?

Step 4

Identify the one finding across all eight that, if it changed, would shift the other findings with it. This is your leverage finding. It is almost always a leadership or cadence issue, not a technology issue.

A note on what most leaders find

After eight questions and four weeks of reflection, most leaders we work with arrive at a similar conclusion: their safety program has been measuring compliance for so long that it has stopped asking whether the operation is safer. The gap they discover is not technological. It is in the cadence of the operation and the ownership of the work. Technology becomes relevant when those two things are ready to be supported. Not before.

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®



PHASE 3

The Plan

DAYS 46–90

Decide what to do

You have findings. You have a pattern. Now you write the plan.

©2026 Powerfleet, Inc., All rights reserved.

POWERFLEET®

The 30-60-90 framework

Three columns. Each column has three to five items. No item appears in more than one column.

	What goes here	Investment required
Days 1–30	Things you will change without spending money. Cadence changes, conversation changes, accountability changes, physical-layout changes that maintenance can handle.	$0
Days 31–60	Things you will change with a moderate, internal-approval investment. A third-party floor assessment, a training overhaul, a new role or hire, a layout investment.	Low to moderate
Days 61–90	Things you will scope, evaluate, and decide on — but not commit to yet. Technology investments. Multi-site rollouts. Vendor evaluations. Capital-cycle work.	To be determined

Three rules for the plan

Rule 1

The first column is non-negotiable

Every operation has cadence and accountability changes that cost nothing. If your first column is empty, you are using cost as an excuse for inaction.

Rule 2

The third column is conditional on the first two

Do not commit to a technology investment in the third column until you have validated the cadence and accountability changes in columns one and two. The customers who realize the strongest outcomes from safety technology are the ones who did the cadence work first. The ones who skipped the cadence work and led with technology mostly bought shelfware on the truck.

Rule 3

The plan has a named owner per item

Not a department. A person has a calendar reminder set for the day the item is due. Items without owners do not happen.

©2026 Powerfleet, Inc., All rights reserved.

A template for the leverage conversation

The single most valuable conversation you'll have in Phase 3 is the one where you take your leverage finding from Phase 2 to your operations counterpart and propose what changes to make. The conversation usually runs about 40 minutes. **The arc is:**

1. **What I saw**
   The leverage finding, in one sentence.
2. **Why it matters**
   The downstream effects on safety, audit readiness, operator retention, and cost.
3. **What I am asking for**
   The specific change in cadence, ownership, or investment.
4. **What I am committing to**
   What you, as EHS, will do differently to make the change work.

That last is what sets this conversation apart from every other safety question the operations leader has heard. The change isn't being delegated to operations. It is being built jointly.

What to do with this playbook after Day 90

You will have a plan. You will have done the work to see your operation honestly. You will know which of your findings need internal investment, which need external partners, and which need technology.

If your plan calls for technology investment, you'll know what to ask for and what not to ask for. And you'll know how to evaluate the vendors who come to your door.

If your plan calls for internal change first, that's the right answer. Come back to the playbook in a year. The questions are still the right questions. The answers will be different, and the gap will be smaller.

If you'd like a conversation about any of this, our team is here to talk. We've worked with safety and compliance leaders across 48,000 enterprise organizations through some version of this exact process. We'll join the call without a slide deck.

Good luck.

Issued by Powerfleet on June 9, 2026, in observance of National Forklift Safety Day.

Sources for the data referenced in the companion:
Field Report: NSC Injury Facts (forklift safety topics, work injury costs);
OSHA Powered Industrial Trucks eTool;
Safety+Health Magazine on safety technology adoption.

POWERFLEET®