WHAT EVERY FACILITIES MANAGER SHOULD DO NOW

If you're responsible for maintaining stores, restaurants, clinics, centers, buildings or any type of facilities, different times of year bring different challenges. **Every season brings its own unique set of conditions that can dramatically impact your facilities management program**.

Towards the end of the year, facilities managers need to ensure all locations are prepared for the holiday season and be smart about year-end budgeting and planning. While facilities managers are always 'on,' the last months of the year are the start of a particularly important time period. Come summer, traffic patterns, weather flows and staffing fluctuations bring their own set of issues to handle. Other seasons have their own characteristics.

Action Items For Every Facilities Manager

There are a number of essential activities that most facilities managers should be focused on throughout the year but **particularly need to plan for during specific parts of each year**.

In this ebook, we identify a number of scenarios you're likely to face, and the **specific actions you can take now to improve your company –** *and your own* **– performance**.

One common thread you'll see is that all these activities rely on technology as today, **facilities management software is an integral part of any FM's role**, regardless of season.

Action Item #1

Pre-Season Preventive Maintenance

Come fall and winter, before you know it, the temps start dropping. And when that happens, you don't want to find out your heating systems have problems. Then come spring and summer. As temps rise, it's critical that A/C and cooling systems are in top order. It's imperative that all this equipment be serviced properly and regularly as recommended.

Ensuring preventive maintenance (PM) happens as scheduled should be at the top of any facility manager's responsibilities. But if you spend your time tracking these PM jobs, from scheduling contractors to ensuring the work's been completed, you risk being inundated with lots of trivial tasks and distracted from where you should be focusing.
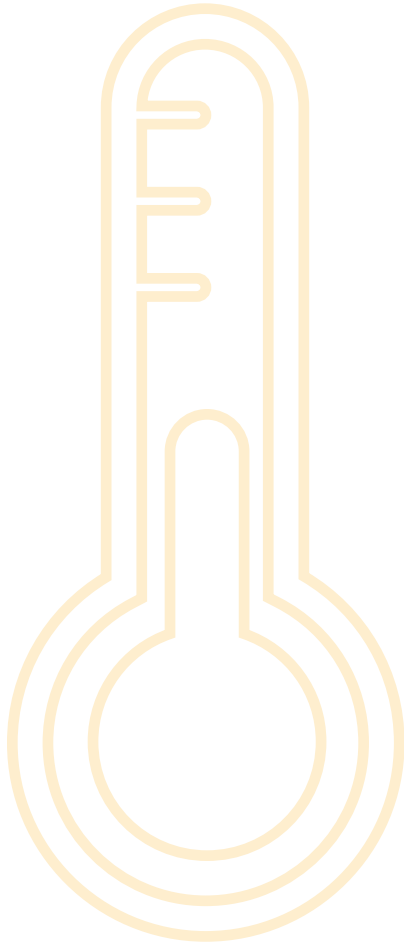
What To Do

Today, the best facilities management software **automates much of the planned maintenance process**. It ensures all locations and assets get the services needed, at the times and frequencies required. For example, work orders to maintain HVAC units get automatically created and directed to the appropriate vendors.

This way, there's **flexible scheduling and real-time monitoring**, resulting in everything from **automated service validation to billing**. Most important, environmental problems (from heating to A/C) – and complaints – during the year will be eliminated.

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Action Item #2
On-Demand Contractor Work Orders

For many locations, when winter arrives, timely snow removal is the difference between business as usual and inaccessible stores, buildings or restaurants, prompting 'your' business to go elsewhere. At other times, lawn care, landscaping, storm preparation or recovery services can be needed, and often urgently.

The challenge with this type of service request is that it **can occur unexpectedly and/or off-hours**. Having your service providers wait until they're formally requested (and when they're likely quite busy) does nothing but **delay needed work from occurring** and issues like snow-filled parking lots or flood damage do not get resolved promptly.

What To Do

For those companies that have trusted contractors or service providers, there are tools and mobile apps that can enable these vendors to *create work orders for themselves* for certain types of work in real-time while on-site, obviously within certain constraints and with specified permissions, for specific tasks such as snow removal.

These contractor-initiated work orders **save you the effort of creating work orders yourself retroactive to the work performed**, as well as having to reconcile invoices arriving months later (and with little to no records of what work was performed where and when). Most

important, this approach gets **required work done faster, when needed, improving quality of service**.

Facilities managers can be challenged with tasks like snow removal as well as other unplanned tasks like garbage pickup, necessary work identified on preventive maintenance calls, etc. To handle these most efficiently, they should **work with their service providers to provide them this capability via their facilities service automation platform** now. This way, they can be fully prepared to improve service levels when conditions warrant (whether it's when the snow starts falling or a storm hits).

Action Item #3

Roofing & Building Infrastructure Checks

Before the seasons turn, it's a great time to check the conditions of all buildings across your locations, particularly spots like roofing that can be toughest to regularly access but can lead to serious damage when least expected and during the most inopportune times.

Each season brings its own challenges, from ice to wind to heat. Unidentified problems can fester, leading to bigger issues down the road with costly budget or even safety impact.

Waiting til building flaws become apparent vastly increases a facility's risk profile. It's imperative to stay on top of the physical and structural conditions of all your locations.

What To Do

One of the best ways to ensure safety and proper conditions, and minimize risk is to regularly perform site audits across all your locations. Using a **mobile-based site audit tool** not only makes doing these checks on a more regular basis easier, it makes the actual review more consistent, objective and comprehensive.

Mobile FM software allows conducting highly efficient facility audits by enabling photos to be taken of any identified issues, and work orders to be submitted right on the spot.

Regular location monitoring through mobile tools is one of the most constructive ways to avoid potential roof and ceiling problems, and other structural issues year-round.

Action Item #4
Pre-Holiday Preparedness

For many sectors, especially for retail, the holiday season can make or break annual results. With others, different times of the year bring their own high impact traffic and corresponding business performance.

For the facilities management department, that means making sure that there's absolutely nothing that will negatively impact the customer experience during these critical time periods.

Ensuring that everything is fully functioning within your store (or other location), i.e. your "store uptime," is paramount to guaranteeing what's called your "**brand uptime,**" particularly at these times.

Without superior brand uptime, you're jeopardizing the company brand and customer experience. And during these high traffic – and often stressful – periods, it's easy for your customers to be turned off – *and away* – quite easily.

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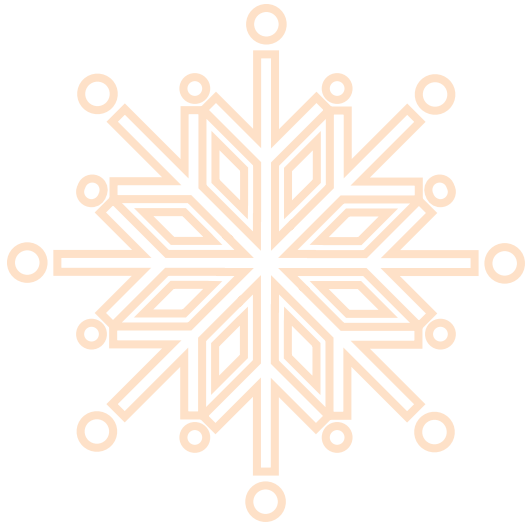
What To Do

FMs need to rely on their facilities management software to track and monitor open work requests, contractor response time and particularly, the aging of service requests to make sure everything's getting fixed quickly. To have any realistic hope of managing everything enterprise-wide, visibility into all aspects of the FM program is essential.

Traditional CMMS (computerized maintenance management systems) don't always have the capabilities to identify problems and track all the open issues and their statuses in real-time, across all your locations. **Full transparency across your program is a must**: everything about your locations, work orders, assets, contractors, etc. must be readily available, understandable and actionable.

You don't want to be the one responsible for sales shortfalls due to festering issues at your sites that push customers, patrons, visitors or patients to your competitor next door or down the block.
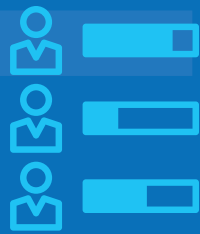
Action Item #5

Contractor / Service Provider Performance Tracking

Following on the earlier issue of ensuring your contractors are quickly and efficiently doing what's needed, is the broader issue of regularly monitoring their performance.

Before your next busy season is upon you and/or planning for next quarter/year begins in earnest, it's **essential for you to know where your service providers stand quality-wise**. Are you working with the best ones? Are you still relying on inferior ones? Are you being smart about where you're directing most of your work?
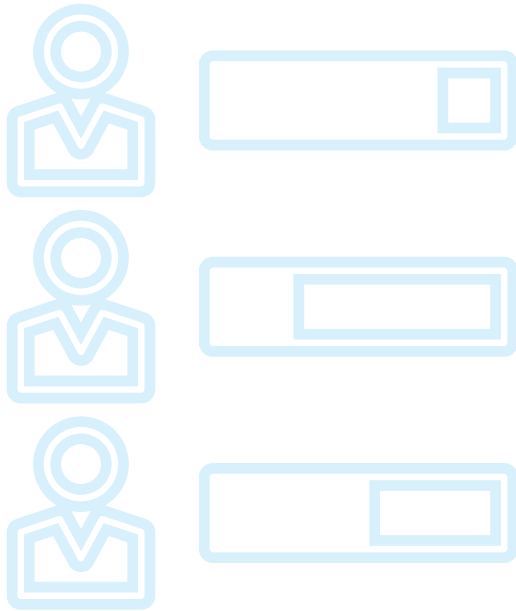
What To Do

The only way to evaluate performance objectively is to track it quantitatively and consistently across your entire vendor base. You need top facilities management software programs that deliver such report cards or scorecards, calculated and updated automatically, upon every vendor visit.

An **effective service provider performance monitoring program** requires several elements:
- Objective KPIs tracked
- Relative performance analysis
- Performance goals specified
- Regularly scheduled conversations/ reviews

Many facilities managers increasingly rely on **data-based contractor scorecards** to provide the **objective measures that form the core of monthly or quarterly reviews** with all their contractors.

By having discussions focused on quantifiable performance rather than differing perspectives or anecdotal recollections on work performed, FMs and their contracted vendors can drill into actual results, take actionable measures and make better decisions.

Action Item #6
End-of-Year Budgeting / Planning

In most companies, in the midst of a busy end of year period (or whenever your fiscal period may end), comes the added burden of having to budget and plan for the following year. Simply relying on whatever you did 12 months earlier is certainly not the best approach.

Smart FMs look to their facilities software to uncover not simply what was spent on repair and maintenance but **exactly where it was spent, for what, how often, for which trades, etc**.

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What To Do

With the **data and analytics available in some of today's FM systems**, a facilities team can compare and analyze its expenses against current budgets, and see how it did and what should be updated for the following period.

There are a number of questions you should be asking before sitting down to plan for the next period, such as:

- Is certain equipment, particular brands or asset categories incurring more in maintenance expense?
- Are new locations coming online in the next quarter(s)?
- Are there enough funds budgeted for preventive maintenance?
- Are your not-to-exceed (NTE) limits set appropriately?
- Are there too many emergency requests and repairs?

For example, if you find there are particular assets that are constantly being repaired, it might make economic sense to replace them. Even **analyzing the energy efficiency and associated costs of large equipment can impact future budgets**. The right data can allow you to make much more effective repair / replace decisions.

How To Do, What You Need To Do Now

step 1

Step one is often simply identifying the challenges and actual/potential problems facing your organization, both now and in subsequent periods. You certainly can't drive improvement without knowing what's wrong or hindering performance. But that's just the beginning.

step 2

The second step is identifying the tools and processes you need to address them, and then putting them in place cost-effectively. Without the right technology and software, designed specifically for the needs of the modern facilities organization, achieving any of these goals is highly unlikely.

Recapping a number of the approaches **where we see the top performing facilities team focus**:

① Automated Planned / Scheduled Maintenance
② Contractor-Initiated Work Orders
③ Mobile Based Site Audits
④ Comprehensive Program Visibility
⑤ Objective Contractor / Service Provider Performance Measurement
⑥ FM Analytics & Reporting

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Regardless of time of year, these are all practices that should be **core components of any facilities program**, regardless of industry, company or team size, budget or sophistication.

And the easiest way to integrate these approaches to **gain the full level of transparency and visibility needed is with a facilities service automation platform** deployed across your organization.

As highlighted above, **traditional CMMS / FM systems simply do not have the broad-based functionality needed** for today's highly competitive environments. These limited systems limit your own capabilities.

Only a modern, cloud-based FM technology solution can bring all the necessary facets together for you in a single, easy-to-use package.

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About ServiceChannel

ServiceChannel provides facilities managers with a single platform to source, procure, manage and pay for repair and maintenance services from commercial contractors across their enterprise. By delivering unprecedented transparency and data-driven analytics of service quality, across all trades, locations and contractors, facilities managers drive significant brand equity and ROI for their organizations without outsourcing or investing in new infrastructure.

The world's leading global brands use ServiceChannel and Big Sky solutions daily to help optimize millions of transactions and billions of dollars of spend annually.

ServiceChannel was named a GAP Inc. Strategic Partner in 2013, awarded two Nike Vendor Excellence Awards in 2010 and 2012, and named Vendor of the Year in 2011 by The Professional Retail Store Maintenance Association (PRSM).

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Transparency Drives Performance

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boost performance and reduce costs across your locations

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Management

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Management

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