

FMI

Mastering facilities management

Work smarter, not harder ✨



Contents

Mastering facilities management 4

- Right-size key processes
- Rethink work requests
- Improve asset understanding
- Introduce efficiencies in contractor management

Focus on customer service 9

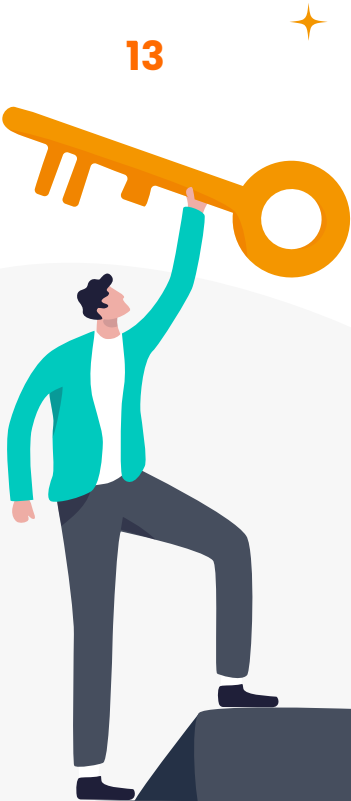
- Empower facilities users
- Leverage automation
- Actively seek feedback

Get your data right 11

- Create good data structures
- Ditch the spreadsheets
- Maintain data management

Improve visibility of operations 13

- Leverage dashboards
- Reframe reporting
- Set meaningful KPIs



The role of facilities managers in organisations is becoming increasingly visible, as is their contribution to achievement of strategic organisational goals.

This increased recognition has invigorated many facilities managers to find new ways to drive scalable, sustainable change for their facilities. Modern software can help achieve this, but software is only part of the solution.

The facilities managers that are doing it well, tell us that it's all about working smarter, not harder, creating everyday efficiencies, gaining better data insights, and fostering constructive collaboration with stakeholders.

In this e-book we share the principles that leading facilities managers follow to stay ahead of the curve.



Right-size key processes



Good processes ensure the right things are getting done, by the right people, at the right time. These processes ensure everyone understands and can execute their responsibilities, supporting consistently high levels of service delivery.

The wrong processes, or a lack of processes, creates inefficiencies and exposes the business to various risks. For example, when key knowledge is locked inside the minds of individuals, the business is faced with a single point of failure. Key tasks can be easily missed, increasing the chance of negative consequences, and team members are left without the support they need to do their role with confidence.

The other extreme is over-engineered processes. These are onerous and inefficient processes that can leave your team frustrated with the red tape required to get something done, or worse, unable to complete the work at all.

The development and continual improvement of efficient processes helps take a facilities manager from good to great. These processes focus on creating efficiencies and support the achievement of the organisation's goals.



Rethink work requests

Work requests often represent a large workload for facilities teams. For facilities users, logging work requests also represents the majority of interaction with the facilities team. The better that interaction, the more positive their perception of the facilities team.

Being a better facilities manager includes providing a better service to stakeholders, and the work request process is key to that service.

Consider the end-to-end workflow for a facilities user raising a request, to having their request completed. How easy is it for them to log the request? Are there clearly defined service levels to maintain? How are those standards, and the status of the request, communicated to the requester?

Moreover, are you able to measure things like average time to resolution or response time, and other indicators of service delivery?

Manual processes for processing work requests create some limitations when it comes to the provision and measuring of service delivery.

If the process of submitting a work request is onerous or confusing, it can cause frustration for facilities users, right from the start of the process. When those requests are received through multiple channels, it is easy for them to be lost or missed. This poses a challenge for consistency in service delivery, and damaging to the perceived value of the facilities team.

The challenges

This multi-channel, manual processing of work requests results in a lack of visibility over current requests. Without a clear picture of what's going on, it is difficult to allocate resources efficiently.

A lack of visibility can also make it hard to gauge the performance of the team. Even at a fundamental level, it limits your ability to see how many requests are coming in and going out.



Lack of visibility over current requests



Difficult to allocate resources efficiently



Hard to gauge team performance



The solution

The work request process can be streamlined by leveraging a dedicated facilities management platform. Platforms like FMI Works create a single point to receive incoming work requests, reducing the chance they will be missed or lost to a flooded or individual inboxes.

Easy to use software can mean submitting a request is as simple as snapping a photo and filling in some basic details. Making the process as simple as possible for the requesters improves compliance with a process they don't necessarily engage with on a regular basis.

Simplifying the process for requesters not only improves compliance, but can lead to a reduction in average time to resolution.

For the facilities team, streamlining this process creates the opportunity for more emphasis on service delivery. With work orders processed more efficiently in a dedicated solution, it becomes easier to not only get the work done, but to evaluate how well it is being done.



Improve asset understanding

It's not uncommon for facilities teams to manage high dollar value asset portfolios. Maintaining an accurate and up to date view of the asset portfolio is critical to business operations and stewardship responsibilities.

Clearly defined and communicated processes for asset acquisition and disposal are essential to efficiently manage asset portfolios.

Asset acquisition may require approvals from multiple areas of the business, such as finance and procurement teams. When assets function as expected, replacement funds can be built into the planning process. But what happens when an asset fails earlier than expected?

Dedicated facilities management software makes it easier to maintain comprehensive asset histories. Knowing when and how an asset has previously performed can serve as a warning that the asset may be problematic and require early intervention.

When the finance team needs to know the financial impact of replacing an asset, the asset history forms the business case for replacement or repair. This data makes it possible to assess the asset's current vs expected condition, the current written down value and remaining book useful life, and expected future maintenance costs.



Introduce efficiencies in contractor management

External contractors and trades are an essential part of facilities management. When work is performed, it must be done by someone appropriately skilled and qualified to do that work.

Each time a contractor is assigned work, it's critical to ensure the required checks of licences, insurances, inductions, and permits are undertaken. By improving processes surrounding documentation and record keeping, these checks can be conducted faster, and with reduced scope for error.

Empowering contractors to upload their own documentation directly into your platform can reduce back and forth in chasing up accreditations and credentials.

When work orders are assigned to that contractor in future, the system can automatically re-check details like licence expiry dates. The details already on file, from previous engagements, mean those details are automatically linked to the relevant work order.

The scope for error is reduced, with the system preventing work orders being assigned to contractors whose licences have lapsed.

By centralising and streamlining this process, significant time can be saved with every contractor engagement. For some organisations, this can represent a huge amount of time that would otherwise be spent double-handling documentation.

Storing information in your own system, rather than relying on contractor systems also ensures your organisation retains ownership and control over that data. Not only will this enable richer data insights for your organisation, it also ensures that you have ready access to evidence that you are meeting your compliance obligations.



Focus on customer service



Facilities management has seen a shift in recent years from a trade-centric function to a customer-centric function. This shift has been driven, in part, by a spotlight on how the built environment affects factors like employee productivity and happiness.

To support the focus shifting towards customer service, modern facilities managers increasingly need soft skills, such as collaboration and communication. Additionally, facilities teams need to be able to understand of the experiences and expectations of facilities users.

Improving the satisfaction of facilities users starts with considering their use of the facilities, and interactions with the facilities team. Often, their experience is centred around the requests they submit.

How easy was it to submit a request? Was the request acknowledged? How quickly was it completed, and to what standard.

The expectations of facilities users are influenced by outside factors and experiences. For example, thanks to online shopping, users expect easy-to-navigate websites, a simple checkout process, and notifications for progress updates.

Thanks to a global pandemic, facilities users are more adept at using mobile technologies, and expect to be able to do almost anything on their phones or other smart devices.

Empower facilities users

Not all facilities users will be submitting work requests on a regular basis. Empowering users with an accessible, easy to follow process, helps to foster a positive perception of that process in the minds of facilities users.

As users improve their compliance with the work request process, the facilities team can reap the benefits of better requests. By customising simple work request templates in facilities management software, you can ensure facilities users know what information is required to action their request.

From a facilities user's perspective, a submitting a simple request from any device, creates a frictionless experience. An easy-to-follow process for submitting requests helps to get the interaction off to the right start, and mutually benefits the user and facilities team.

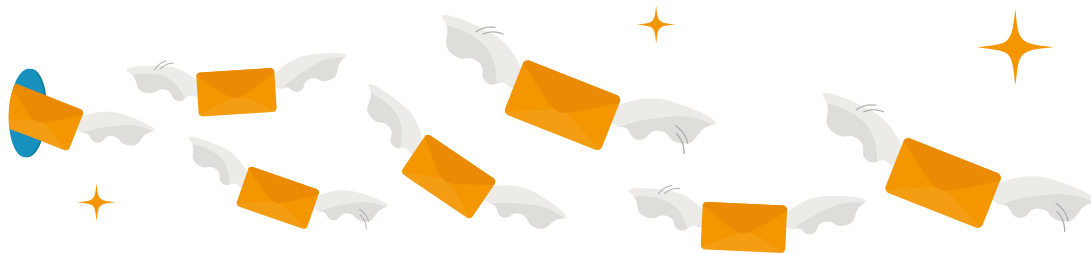
Leverage automation

Automation is commonplace in the digital experience for many facilities users. For example, when buying something online, they expect to see a confirmation screen, and then receive confirmation emails and updates allowing them to track their package.

This process is reflected in facilities teams who have made a commitment to customer service. When a work request is submitted, requester want to know their request has been received, and will be actioned. In the absence of automation, request acknowledgement and status updates are a manual process, which is costly, inefficient, and prone to error.

Automatic request acknowledgements are a simple automation that help to put facilities users' minds at ease. As work progresses, status updates can be automated, to keep the requester in the loop as work progresses.

These simple communication automations help to foster positive, collaborative relationships with requesters. Over time, enhancing the perception of, and trust in, the facilities team.

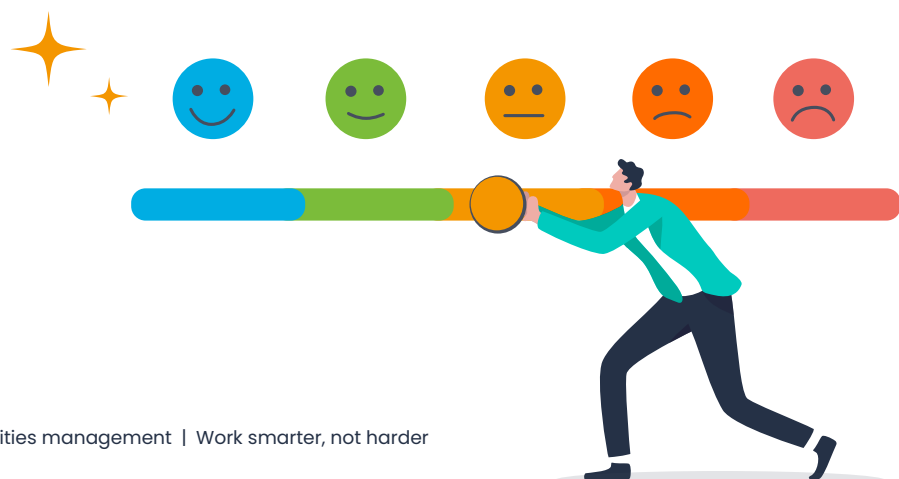


Actively seek feedback

Putting requesters first means improving your understanding of their expectations and experiences with the facilities team. One of the easiest ways to start building an effective feedback loop is sending feedback surveys to facilities users upon completion of a requested job.

Within FMI, these quick and easy surveys can be automated based on completion of the job. Include a survey link in automated status updates to improve your chances of a response.

This feedback from requesters can provide valuable insight into the needs and expectations of users, as well as uncover otherwise unseen opportunities for improvement.



Get your data right



The rise of technology means that facilities teams have access to more data than ever before. However, if data isn't accurate or timely, it creates more problems than it solves. At best, it's not available to support decision making, and at worst, can result in misinformed decisions.

Great facilities managers leverage data to make informed decisions around things like asset disposal, renewal and replacement. Looking at historical maintenance work and the cost of those works supports better decisions about what should happen to that asset.

Being able to assess the quality of a contractor's work helps make decisions around contract renewals. And asset condition and replacement costs support capital renewal forecasting at budget submission time.

Data-driven decisions around resource allocation maximise the return on investment for the organisation. The better the data is, the more informed these decisions can be.

Three important principles ensure your data can be leveraged effectively for decision making. **These principles are:**



A robust data structure



Investment in a data management system



A data maintenance practice

Create good data structures

Good data starts with a clearly defined data structure that supports the investment decisions you need to make.

Many organisations fall into the trap of creating an overly complicated data structure. Too many levels or categories in the structure are hard to maintain, and make it difficult to extract meaningful information.

The adage “start with the end in mind” is a useful guiding principle. Getting clear on what information you need for decision-making is the best guide for setting up your data structure.

Ditch the spreadsheets

Having all your data in one place improves its accessibility and accuracy. Typically, when organisations store data in spreadsheets, it's at the sacrifice of accessibility, control and security.

Saving asset information across various spreadsheets, creates a lot of unnecessary work, and a minefield for inaccurate data. Manual processes such as this create data silos that dramatically increase scope for error.

Centralising data into a single platform, creating a single source of truth, is critical to improving data quality.

Platforms like FMI Works bring all asset information into one place. Consolidating this information ensures it is up to date, and accessible when and where it is needed.

Maintain data management

When it comes to data management, it is critically important to have well-defined and documented processes in place to guide those who play a part in managing the data.

Ensuring the right users have the right permissions helps to control the data structure. An often overlooked but important practice is limiting the number of “super users” within the solution, and periodically reviewing user permissions.

If extra permissions become a free-for-all, uninformed users can inadvertently create fields that muddy your analysis and reporting.

Outside of the FM team, facilities users and contractors can enrich your data, if the right tools and processes are in place.

For example, consider work request templates in your facilities management solution. If facilities users can quickly select from a predefined list when requesting work to be done, the right data is efficiently collected. The work can be both efficiently actioned and analysed upon completion.



Improve visibility of operations



Great facilities managers know what's going on in their facilities. They prioritise planning, and ensure key information is available to everyone who contributes to and relies on facilities management.

Leverage dashboards

Ensuring your team is all on the same page when it comes to visibility of work in progress creates efficiencies in work management. When team members can easily see what jobs they have, and the status of those jobs, they're able to prioritise jobs more efficiently.

Dashboards can help team members see what their workload looks like at a glance.

Providing a dashboard of all open work orders assigned to them saves team members time every morning. From one place, they can see what jobs require their attention, and the status of every job they're assigned.

For stakeholders and facilities users, these dashboards mean getting quick answers to any questions. Members of the facilities team can quickly and easily see what jobs need attention, providing instant status updates to enquiring requesters.



Reframe reporting

Reporting requirements are ever-increasing, particularly in industries such as health and aged care. Great facilities managers have reframed the way they think about reporting. Beyond compliance, reporting provides opportunities to unlock strategic data insights that can feed into investment decisions and process improvements.

If you are pulling data from a centralised platform, rather than multiple sources, you're already ahead of the curve.

Visual reports that graphically represent important information make information more accessible to a broader audience. Busy stakeholders can consume and digest the information quickly, leaving more time for valuable discussion of the contents.

Automating scheduling and sending of key reports at regular intervals, allows you to efficiently provide value to stakeholders in your organisation.

Set meaningful KPIs

Too much data, and irrelevant data, can take the focus off the most meaningful metrics. Key to understanding what data you want, and in what format, is creating KPIs that align with the strategic goals of your organisation.

For example, your organisation might have a goal to minimise disruptions to service delivery. Knowing planned maintenance helps to reduce unexpected breakdowns, you might set a goal to balance the quantity of planned maintenance jobs against reactive jobs.

In this simple example, you would need to be able to easily see how many jobs were completed, and how many of those were for planned maintenance vs reactive.

Another example could be an organisational goal to create customer-centric facilities. In this example, the data you would be seeking would be related to customer feedback. This could be average time to completion, percentage of jobs closed, or feedback metrics collected from requesters.

Because facilities management contributes to so many parts of organisations, it can be tempting to set too many KPIs. By ensuring KPIs are linked to organisational goals, you can keep sight of the bigger picture, while understanding the smaller steps to get there.





How to get started

If you're ready to move forward and **master facilities management** we can work with you to develop and refine your plan.

Visit our website to speak with one of our facilities management experts today.



fmiworks.com

