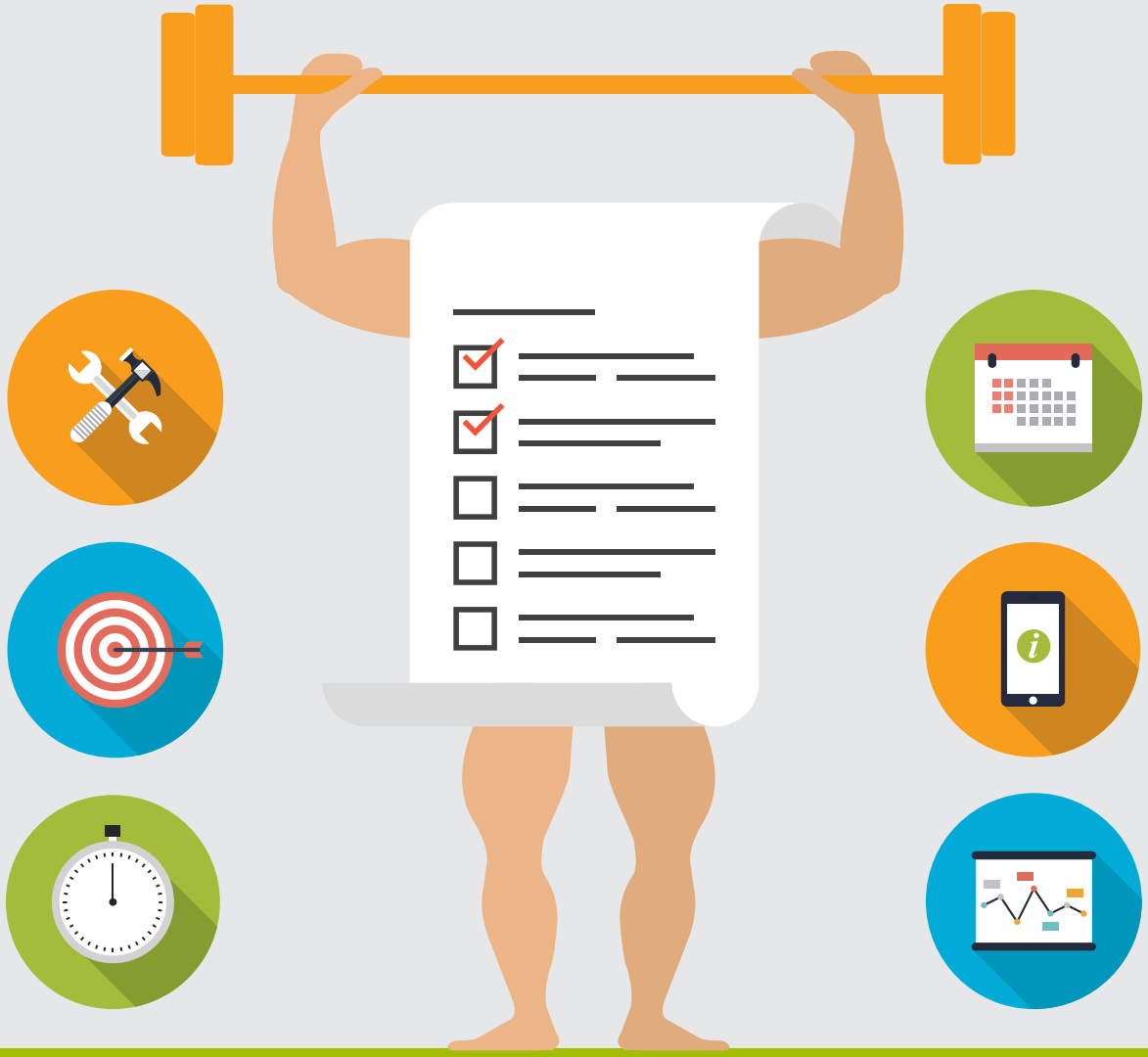
WORK ORDER WORKOUT

30 days to a Healthier Work Order Process



Presented By:

iOffice®

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As the facilities manager, it is your job to ensure every facet of the facility is running at maximum capacity. Your workforce must have the tools they need to be productive, which means down time must be kept to a minimum. If systems aren't working, productivity is lost and the company's bottom line is affected.

Furthermore, the length of time your workforce is out of commission, the more money is lost, which directly correlates to how well you perform your job.

Therefore, it is mission critical that you analyze the work order process, how it is currently being handled, and where it can be improved upon.

You are guaranteed to gain valuable insight into other strategies within the organization along the way, improving the quality of service as a whole.

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INTRODUCTION

The purpose of this ebook is to guide you through the important stages of analyzing past, present, and future to develop a more streamlined and effective work order process. At the end of the month you can expect to have a plan of action that will benefit the company for years to come.

So, let's get started!

EXAMINING YOUR CURRENT PROCESSES & IDENTIFYING LONG TERM GOALS

The only way to improve on your current processes is to examine where you are going, where you have been, and what is working for your colleagues.

You will need to do some preparation before you get started on this 1 month challenge.

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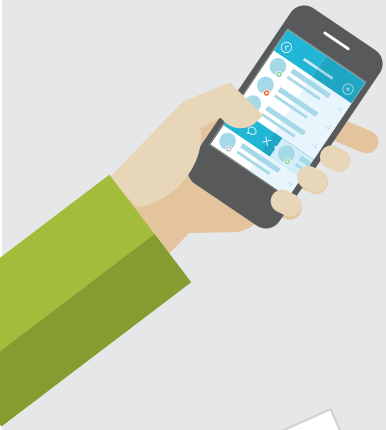
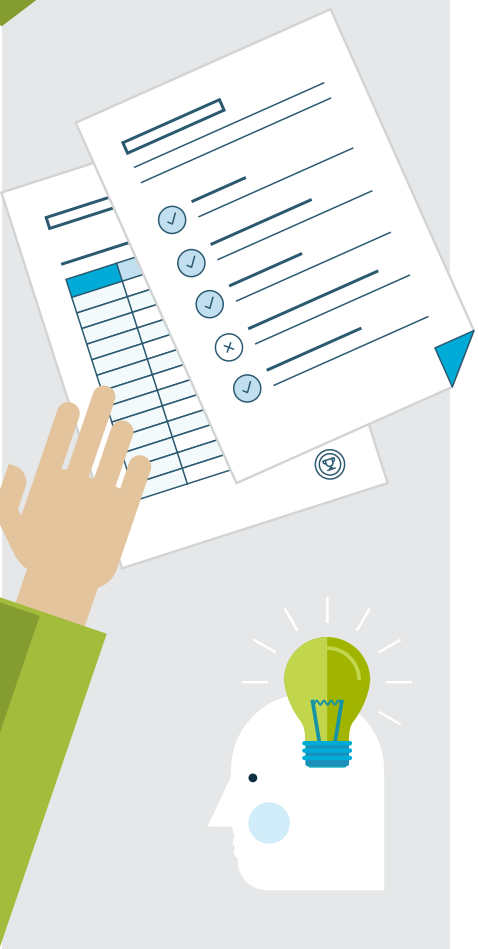
WHAT IS A WORK ORDER?

Whether you call it a maintenance request, service request, ticket, or work order, the end result is the same. It is a means of communication with your servicing maintenance department, in which regular maintenance, repair, or installation of equipment is requested. It serves as a scheduling and documenting tool, regarding both time and materials expended on a particular assignment. Such requests can be handled in a multitude of ways, depending on the tools your company has in their arsenal.



HOW DOES YOUR COMPANY CURRENTLY HANDLE SERVICE REQUESTS?

With so many variables, it's important to ask the right questions of your own processes to make sure you're running as efficiently as possible. For instance, do you send and/or receive an email or a phone call? Or has a software system been implemented to handle such requests? Is your entire workforce approved to send out work orders, or does management require prior approval? Once a work order is generated, how does the requestor receive updates on progress and completion? Are any details logged, regarding the complaint and what was done to rectify the problem? How do you know when the equipment should be serviced again? Additionally, what type of servicing does your organization consider important - are service requests issued on a daily or as needed basis?

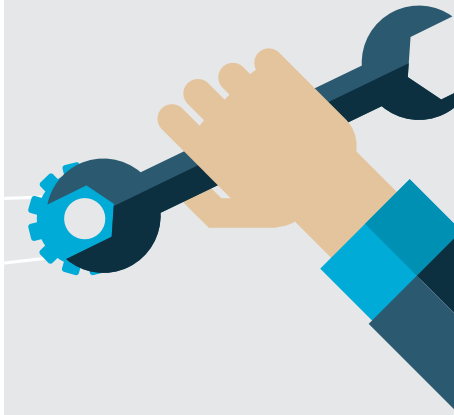


Each company places different value on equipment maintenance and prioritizing issued work orders as blanket, emergency, repair, or routine can be quite valuable in keeping the process moving forward.

It is important that your team understand current processes and how beneficial they are for the whole picture, in order to identify where changes must be made moving forward.

Lost productivity leads to frustration that can be felt throughout the organization and, perhaps more importantly, affects the company's bottom line.

PREVENTATIVE MAINTENANCE PROGRAMS



Numerous companies have discovered the value of preventative maintenance (PM). A preventative maintenance plan generates work orders on a schedule, rather than by user request and is designed to improve the life of your equipment, as well as avoid any unplanned maintenance. Your preventative plan should include the lubrication, cleaning, adjusting, and minor component replacement of facility equipment; it's primarily designed to extend the life of equipment and the facility, therefore saving the company money. Depreciation and breakdowns are minimized, and issues are often identified before they become real problems.

By spending a portion of the company budget on such requests, you not only save in lost down time and repair/replacement costs, you also reduce energy usage and the associated costs.

Whether you own the facility or are leasing it, your preventative maintenance plan should be the same and should include: **testing of equipment, periodic inspection, preplanned maintenance activities, and maintenance to correct any weaknesses found through inspection and/or testing.** The benefits of a preventative maintenance plan are realized in a number of ways:

Safety: Part of your role as the FM is to ensure the safety of your workforce, including the maintenance technicians, at all times. By enforcing a PM plan, you ensure all equipment is maintained at the highest standards and avoid emergency situations that could put your people at risk.

Efficiency: The wear and tear of equipment over time is typical, and can affect the speed and efficiency of your equipment. A preventative maintenance plan can conserve the life of your equipment, increase overall efficiency, and reduce downtime due to failed equipment.

Short-term savings: Large repairs or replacement often come at a much higher price tag than regular, scheduled maintenance.

Long-term Savings: The long-term savings of a PM plan come in multiple forms. If downtime is necessary for repairs or maintenance, it can be scheduled; ensuring loss of productivity is minimized. Routine maintenance of the facility's assets increases the life expectancy and helps avoid large-scale repairs/replacement. Additionally, asset breakdown typically leads to secondary failures and the unnecessary damage of other parts. Routine maintenance helps minimize these losses, identifying issues before they lead to system failure. Lastly, if your team has implemented a system to analyze the facility's maintenance activity, any assets that are costing more to maintain than to replace will be identified before costs become excessive.

Time and productivity savings: Preventative maintenance activity typically takes less time to complete than emergency repairs (or replacements). Additionally, since maintenance can be scheduled, you can plan for a time when the impact on productivity will be minimal.

If your company does not currently have a preventative maintenance plan in place, this is the perfect time to implement one. By doing so, you keep everyone safely working towards overall goals and keep costs at a minimum. To determine the value of preventative maintenance, consider the "law of PM programs" - the higher the value of assets and equipment per square foot, the greater the return.

So, if downtime costs $10,000 per minute, and your PM plan reduces downtime
from 300 hours per year to 25 hours per year,
that's a savings of $2.75 million a year!
With results like that, the value of implementing such a program is undeniable.

MEANINGFUL METRICS

We have all heard the old adage, "You can't manage what you don't measure." Monitoring, measuring, and reporting has often been viewed as something that would be nice to have, yet unnecessary and a mostly waste of company resources. It's easier to focus attention elsewhere, assuming everything is working as it should…until something goes wrong. Then everyone wants to know what happened (or didn't, in most cases) and where the ball was dropped. If your company does not currently measure performance, now is the time to start. How else will you know if the new processes you've implemented are working? By the end of the month, you and your team will have invested many hours towards a more streamlined process; wouldn't it be a shame to not be able to measure your success? If you are currently collecting and measure data, what is being tracked and how do these metrics fit in towards accomplishing future goals?

Accurate, reliable, and timely information is necessary for management to run a successful operation, and the work order process is no different.

We will discuss, in greater detail, where metrics should fit in to your new plan, but for now, consider the 5 P's when determining which aspects of the process you need to monitor and measure, as each are building blocks for ensuring overall success. Ultimately, proper management in each of these areas plays a critical role in achieving both short and long-term goals.

PEOPLE

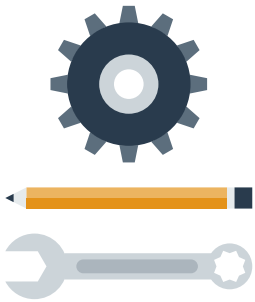
Measuring the performance of your people will ensure the right person is assigned to the correct role.

PROCESSES

The consistency of proper execution of each task will help you identify any aspects that might need further attention.

PRODUCTS

Measuring the technical tools being used and at what level they perform is critical to overall success, both individually and organizationally. Your processes might be working, but if the tools used to execute are not up to par, the whole plan falls apart.



PARTNERS

What internal and external technicians have you enlisted to ensure work order success? The quality and timeliness of service are both critical for meeting your company's servicing demands.

PERFORMANCE

The work order process is only as strong as the value it adds to the business. Standards for timeliness, cost, and user satisfaction are all defining factors in the overall value and, therefore, must be measured.

WEEK ONE

Communication & Process

Welcome to Week #1- this week's focus is on the big picture. Hopefully you have taken a little time to consider the items mentioned above, and where they fit into YOUR "big picture." Now it's time to delve a little deeper and gather information about your current processes. You need to understand where you have been, in order to develop achievable goals, identify where improvements are needed, and develop a plan of action accordingly. Knowledge is power, but only if you know what to do with it once acquired.

DAY 01

The first day, your focus should be on gathering as much information as you can regarding current work order communication. Spend 30 minutes to an hour identifying the communication process, so you can determine what is being done right and what areas need improvement. This will help your team in figuring ways to improve.

INFORMATION TO BE GATHERED SHOULD INCLUDE:

- *How are service requests communicated to the responsible parties? Is there a different process depending upon the type of request (i.e. emergency, repair, or routine).*
- *Once the issue has been resolved, how is this communicated back to the requestor?*
- *Are any details about the servicing available? If so, where is this information stored and what is the scope of information provided?*
- *Are work orders being recorded in a centralized location?*
- *Is the information gathered/stored being used to measure performance? What details are you gathering and what metrics does your organization currently analyze?*

DAY 02

The next 2 days, your focus is going to shift to evaluating current organizational processes. You are going to want input from all involved parties on this, as those who are in the trenches day in and day out are going to be able to provide the most knowledge regarding such processes. Speak with the HR and IT departments, as well as technicians and employees who typically send out work order requests. By doing so, you see the big picture, thus strengthening your plan of action moving forward. Remember, knowledge is power.

TODAY, FOCUS ON GATHERING INFORMATION ON THE FOLLOWING:

- *Now that you know how requests are currently being communicated, what can you do to strengthen this process. Requests should be user friendly or your workforce will forgo the process altogether. Whether you use an outside technician or have your own maintenance department, there should be a steady flow of communication at all times.*
- *If you receive phone calls, how is the complaint recorded and who dis-*

patches the information to necessary technicians?

- *If a request is received via email, how is this handled? Does someone from the facilities team receive the email and forward on to the technician? Who records the information throughout the process? Are all emails answered and if so, by whom?*
- *Many companies today utilize a software system for recording and dispatching requests. If your company has invested in software, how is that working for you? Is it user friendly? Who are the approved users? Do your technicians have access to the same tools and how much information about the servicing are they able to include in the service notes?*
- *How important is mobility to your organization? Do you currently utilize a mobile app? If so, how effective is this application and what software systems is it linked to? The ability to generate a work order from anywhere, at any time, enhances your entire workforce's performance.*

DAY 03

So, you've built your knowledge base regarding the communication process. Today is about identifying ways to improve. It is important to have a clear picture of the company's overall goals when coming up with solutions. If the business' overall plan is to double in size, processes that work today may not work a year from now. And by enhancing overall communication throughout the company, you build a collaborative workspace culture in which all employees feel engaged. The information you take away from your analyses stand to strengthen the entire company.

USE THE KNOWLEDGE YOU'VE GATHERED TO IDENTIFY HOW UPDATES REGARDING RESOLUTIONS SHOULD BE COMMUNICATED:

- *Is a phone call the most efficient way to let the requestor know their issue has been resolved?*
- *Does your workforce prefer an email response?*
- *Do you have a software tool that offers detailed updates, notifying all involved parties as to when the work order is complete?*
- *If your workforce were on the go, would they respond best to mobile applications?*

DAY 04

One of the most valuable resources available to facility management teams today is data. With the right tools, we can collect data on virtually every aspect of the business; examine where improvements are needed, as well as measure progress from such changes. What system do you have in place to collect and measure data? How do you sift through all the information and organize it to provide you valuable, measurable results? Metrics will be your focus for the rest of this week.

In order for your company to identify where improvements are needed, you must measure current performance. Once changes have been made, it's necessary to continue those performance measures, or you won't know where further adjustments are needed.

CONSIDER THE FOLLOWING IN MEASURING CURRENT PERFORMANCE:

- *Who is approved to submit work order requests and who responds to said requests?*
- *Is your system set up to assign tasks to necessary parties based on the type of work order request? How far-reaching are your technicians— are all issues handled internally or are some outsourced to third party contractors? Are there specialists that respond to issues based on the type of request, location, and priority? Who determines priority?*
- *What member of your workforce is the primary contact when maintenance requests are issued? Is this dependent on what work is needed or does it go to one designated person, who then forwards on to necessary parties?*
- *Since these issues are typically time sensitive, how do you ensure they are forwarded on in a timely manner?*
- *What relevant details are recorded and made available to help the technician resolve the issue more rapidly?*
- *Just as important, are the details of the servicing and resolution. What details are recorded and how are they stored? Who has access to this information?*
- *Is a reference number assigned to each work order for quick look up?*

By examining these items in detail, you're able to understand overall performance, giving you a baseline for future measurement. Flaws in the system are uncovered and new strategies are implemented. Which leads us to Day 5, where you will record and measure overall performance.

DAY 05

Today, you want to focus on putting all the details together, to record and measure overall performance. Was the issue resolved to the satisfaction of the requestor?

LET'S LOOK AT A FEW FACTORS YOU WILL WANT TO CONSIDER WHEN ANALYZING OVERALL PERFORMANCE.

- *What are the specifics of the work order? Was it for a downed computer system, routine maintenance of equipment, etc?*
- *Who responded to the request and how quickly was the information forwarded on to necessary parties?*
- *Once the request was entered, how long before the issue was resolved?*
- *What were the overall costs associated with this work order? This will help management in determining if this is something that should be monitored in the future, or scheduled for routine/preventative maintenance.*

Congratulations, you've made it through the first week of this month-long program! Hopefully you have painted a clearer picture of how things are communicated and handled through the work order process. Next week is about putting the data together.

WEEK TWO

Cataloguing

Now that you have had an opportunity to gather information regarding how the company's work orders are communicated and processed, it's time to start cataloguing the data. This will help you form that big picture we discussed before, so that you get more of an idea as to where your resources are allotted the most, which assets might be wearing down, which are costing you the most money (in both energy cost and maintenance/repair) and what equipment could benefit from a preventative maintenance plan.

DAY 06

Today, you will only need to spend about ten minutes reviewing and cataloguing the company's current "on-demand" requests submitted by your workforce. Your goal is to determine which requests are submitted the most. If you utilize a management tool such as *iOffice's IWMS*, this report can be generated quickly and painlessly. If requests are sent via email, this will take a little time to compile. If work orders are currently handed out via telephone calls or hand-written reports, skip this step for now. But we would recommend using this time to develop a more metric-friendly system of assigning service requests, so you can paint a clear picture moving forward.

DAY 07

On day 7, you will need to spend about 30 minutes reviewing and simplifying the current "on-demand" catalogue of requests submitted by the user population. Break it down into user-friendly categories and sub-categories.

EXPERT TIP: *Ideally you want no more than 15 categories/groups with no more than 4 to 6 items/request types to choose from per group. Your culled list should look something like this:*

- *AC/Heating*
- *building exterior maintenance*
- *landscaping*
- *building interior maintenance*
- *doors and locks*
- *elevator*
- *furniture and fixtures*
- *janitorial*
- *kitchen and break room*
- *lighting and electrical*
- *plumbing and restrooms*
- *preventative maintenance*

The information you collect for each service request is important in ensuring the work is completed in a timely manner. If additional information is needed, this slows down the entire process, potentially causing a loss in

productivity. What details do you collect and record and how do you do so? If you use a management tool such as iOffice's IWMS, the requestor date and time, well as location are automatically collected. What other fields do you want to include? Are there requests that require additional information besides requestor, location, date and time? For example, is a security badge required for access to certain floors? How are you going to collect this information and how will it be passed on to the technicians?

DAY 08

If your company already has a preventative maintenance plan in place, today is the day to review standard procedures for your program. Review the current list of preventative maintenance tickets and how they are organized. How are these requests currently classified and how are they relayed to technicians? Form a complete PM list, which you will delve deeper into on Day Nine Follow.

Determine what PM requests are submitted the most, and the costs associated with each service. Your FM software tool should have the ability to collect and sort this data for you so that it is easy to analyze and recognize patterns. Tomorrow you will use this data to identify what aspects of the PM plan should be amended.

DAY 09

Now that you've gathered all the information regarding preventative maintenance requests, it is time to put it all together and make necessary adjustments. Analyze the data to determine how many of the company's assets require service requests in between the routine maintenance, or have high costs associated with each servicing. Depending upon the scope of these requests, you may need to adjust your preventative maintenance plan/schedule to minimize losses and maximize profits.

Today is also the day to cull the list of Preventative Maintenance requests. Is it a complete list? Are there any duplicates? You want to have a list that is complete and easy to understand, without too many choices for the requestor to choose from. Use the previous rule we mentioned in Day Seven - no more than 15 categories and 4-6 subcategories. Use all the information you

have gathered to set up a complete plan, identifying those activities that you would like to occur weekly, monthly, quarterly, semi-annually and annually. Once you have done that, you can set them up to automatically occur, with adjustments made on an as-needed basis.

DAY 10

One of the most effective ways of ensuring your workforce handles major changes with ease is by involving them in the process. Since your staff will be directly affected by these changes on a daily basis, now would be the time to review the updated catalogue of requests with them. The catalogue should be user-friendly for maximized productivity. Once you have your finalized list of on-demand and preventative maintenance tasks, schedule a call with your FM software implementation manager to help make these service request improvements.

WEEK THREE

Dispatch and Execution

You are now halfway through developing a new, improved work order program- how are you feeling about the upcoming changes so far? Are you feeling overwhelmed, or confident in this new plan of action? If you're still unsure, not to worry, the next two weeks is about putting it all together. This week's focus is on the dispatch, execution, and closing process. Who dispatches the service requests to the proper technicians, who monitors the progress and who/what determines when the service ticket is closed? ***Let's get started!***

DAY 11

Today, you will need to spend approximately 30 minutes analyzing time request duration history. Time request duration is defined as completed time - submitted time, meaning, the total time taken to complete the service request. Reviewing prior history will give you a good idea as to how long it typically takes for each category, setting the standard for future requests. If the history reveals requests that took longer than they should, identify where the glitch originated. Perhaps it was simply a busy day for the servicing technician, or, perhaps the servicing details were delayed in reaching the tech, slowing down the entire process. Whatever the reason, notate your files for reference, as these are critical processing faults that you will want to address.

You will also want to research to determine if your company has a service level agreement (SLA) with contractors and technicians, or if a standard has been set for maximum allowable times required to complete requests. If so, do SLA and maximum times vary depending upon request type? Do your users have the ability to set a priority level or change the due date and/or time? If this is not currently an option, is this something you would like to write into your improved plan? Based on prior performance, is there an estimated completion time for requests that you would like to set as a benchmark to measure actual performance? Remember, the best way to measure where you are going is to measure where you have been.

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EXPERT TIP: *Make clear, easy choices for your end users, and be sure to have a system in place to notify them of when to expect the service or repair by.*

DAY 12

The next 2 days you will be making decisions regarding the dispatch process. You will likely want for some service requests to be manually dispatched, while others are set for automation. Today, spend about thirty minutes or so determining what requests will be on the manual dispatch list. You will want to define a practice for these manual assignments - who will handle these, how will the technician be notified, what is the maximum time required between request and dispatch? How will the end user be notified, what details will you include, and what is the timeframe goal between dispatch and requestor notification? Be realistic about time goals,

as the end user/requestor, who may be experiencing downtime because of the required service, will be counting on the accuracy.

DAY 13

Now that you have set the parameters for manual requests, let's set a process for automated service tickets. What types of requests will be set up for automation? Who will be assigned to this case- are they based on request type, priority level, or location? Are there any automated requests that will require more than one technician to complete? If so, you will want to set parameters and guidelines as to how this is handled.

Also, consider the possibility that the assigned party might be on vacation or out on a big job. Is there another technician that the system can automatically reassign the case to if the designated responsible party does not respond within a specific time? While this is a tedious process on the front end, the benefits far exceed time spent on the details now.

DAY 14

You're almost finished with Week 3- just a few more details to nail down. The next 2 days are about putting it all together; defining a submission and execution process that respects the time-sensitive nature of the requests from every angle.

For each request category, you will want to determine what additional information would be helpful for the requestor to communicate to the technician. Many categories, particularly those falling under "preventative maintenance," will have standard operational instructions that can be automatically attached to the service ticket.

Now is the time to identify each of these, as your IWMS software manager will need to attach them in each section. Many companies have found it helpful to add a "comments" section where additional notes can be entered, with the option to attach pictures or documentation.

DAY 15

Once you have all these details mapped out, the only thing left to consider is service request completion. Should the technician have the ability to close out tickets or would you rather a dispatcher complete the process? Will automated tickets be handled differently than on-demand requests? Who will notify the requestor and how will this process be completed? You want your workforce to stay apprised of service progress without bogging them down with too many details.

Work with management and technicians to determine a standard practice for completing and closing out a request, and notifying the requestor.

WEEK FOUR

Reporting

Up to this point we've detailed how input is dispatched and received. This week's focus will be on the who, what, where, when, and how of extracting output. Analyzing reports is as critical a part of the process as any other and should not be overlooked.

DAY 16

We have discussed the benefits of monitoring, measuring, and reporting business activities. It's important to remember that the service request process affects the people who serve your company both internally and externally. Thus, service request metrics must be measured accordingly. Everyone must know their role in running and analyzing the data for maximized efficiency.

For general reporting, map out a plan of who will be running and viewing reports? This is typically assigned to the facilities manager, team department heads, and company executives. How often should these reports be run? You may start out with a weekly analysis and find yourself overwhelmed, unsure of how to put all the data together. Reports should be run weekly, monthly, and/or quarterly to gain a clear picture of how your new processes are working and where adjustments should be made.

What types of reporting add the most value to your team? This could come in the form of lists, tables with quantities, or charts (line/bar/pie). Finally, what level of detail do you want to see when reporting on Service Request activity? Use Key Performance Indicators (KPIs) to measure the performance and health of the submission, execution, and completion process. Details such as the date and time of submission, requestor info, operator info, request type, location, and priority should all be factored into performance measuring.

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EXPERT TIP: *While the type of reports run will vary by organization, a few common reports you should consider including are:*

- *Number of requests submitted by location, category, and priority within a specified date range.*
- *Number of requests submitted by priority and affected unit.*
- *How many requests were completed on time (compared to SLA, estimated completion, priority, and date required).*
- *Number of requests resolved upon first contact.*
- *Number of requests re-assigned to a new technician (and why).*
- *How many requests were completed per operator.*
- *Summary list of completed requests.*

- *Summary of closed requests and why were they closed before completion.*
- *Current number of open requests.*
- *Average age of current open requests.*
- *Detailed list of completed requests, with details including: request type, requestor, operator, resolution, time open, cost, etc.*
- *Number of requests with errors in categorization, assignment, and prioritization.*

The data and performance measured will vary depending upon multiple factors, such as size of your company, average number of requests, etc. For the first month or so, you will want to review these reports with department heads and executives to ensure relevant reports are being run and identify any extraneous data is eliminated.

DAY 17

Today you will want to spend about 15 minutes reviewing the general reporting notes you made yesterday, as well as all catalogue details and the dispatch and execution practices outlined in Weeks 1-3. Check to ensure the desired output details have been input correctly through today. You will need these details for tomorrow's activities.

DAY 18

Now that you have defined the reports you and your team feel would be beneficial, it's time to put it all together. Today you will be creating report templates for each report. What report type did you decide to use - lists, tables, or charts? You will also need to define the filters, for example: completed date range, location, and requests seen to completion (not cancelled). Lastly, the fields and measures you want included in data analysis. Your IWMS should walk you through this step by step; if not, contact your software implementation manager for help.

DAY 19

Once you have your templates laid out, review them with your team members and get input on any suggested changes. Make adjustments in the system as needed. Again, the parameters of data collected may need to be refined in the beginning months, but it's best to start out with as complete a list as possible.

DAY 20

Now that you have completed the templates for all reports, it's time to determine what information you want viewed in the dashboards. A dashboard provides you a visual display of multiple reports. It offers you a quick glance at the most important data needed to achieve defined company goals. The information is consolidated and arranged on a single screen so the information can be monitored quickly and easily.

Typically, dashboards are designed to be used by the general workforce and should be easy to use and understand. Look for input from your FM team and department heads in determining what KPIs you want included, so you're able to quickly identify what performance indicators are underperforming. Data will update automatically, with updating frequency parameters set forth by your team. These should vary depending upon your organization and the purpose of the data, but will typically be updated on a daily basis.

SUCCESS STORIES

Revamping your company's work order program probably seems like an overwhelming task; one easier left as-is. After all, what benefits do you really stand to gain from such a process? We have worked with many clients on developing a new service request program that automates and streamlines processes, offering undeniable savings immediately. Let's take a look at a few examples.

CASE #1

We had the pleasure of working with a well-known bank, who's space spanned almost 500 offices and over 1 million square feet. With so much space to manage and maintain, you can easily understand why a service request program coordinated through e-mails, phone calls, and spreadsheets could become overwhelming and difficult to manage. Additionally, such methods offered the bank very little information in which to track request activity, coordinate with third-party technicians, and analyze costs and performance. It is difficult to plan properly for the future, if you have little idea as to whence you came.

We worked closely with bank administrators to help develop a system that met their current needs and could grow with the bank as they added new branches and expanded their square footage. The final work order program looked something like this:

- *End users submit all service requests to the area administrator.*
- *Work orders were entered into a service request module*

on their management system that is both user-friendly and available wherever the admin has access to the Internet.

- *Once the service ticket has been generated, it is automatically dispatched to the proper technician, based on the type of request and location. The technicians have the ability to accept (or reject) the ticket, read any details regarding the issue, and record details regarding the servicing, materials used, and costs associated. If, for whatever reason, a technician must reject an assignment, the system automatically dispatches to the next technician in line. Access is granted via the Internet or mobile devices via the service request mobile application.*
- *Administrators have the ability to monitor the queue to ensure all tickets are being handled and are closed without issue.*

Since implementation, the bank has successfully managed over 125,000 service tickets through their improved, streamlined process. Technicians are able to respond quicker and management has the ability to track all activity and costs. Volume, cost, and performance metrics ensure future budget planning is based on the most accurate information.

CASE #2

Not too long ago, a client came to us for help developing a tracking and measuring system for service improvements they were implementing for clients. This global company measures much of their success based on the quality of their customer service, yet they did not have a platform to accurately measure their successes. They were still using spreadsheets and paper logs, which was costing the company countless hours each month as management gathered the information and struggled to summarize the data into usable reports. Aside from lost

man-hours, our client found their customer relationships were compromised due to reporting errors and the inability to study clear, measurable results. As a company who prides themselves on remaining at the top of their field in adopting new technology, it was time to make some changes.

After working closely with our client to find out their specific needs, we implemented a software solution that offered some powerful results:

- *With an IWMS in place, they were able to eliminate the paper trail in exchange for a tool that allowed for service requests to be submitted, tracked and measured.*
- *Management gained access to real-time reporting information that reflected the most recent activities as well as performance ratings and cost, which was also viewable by the end-user.*
- *The client has multiple locations across the globe. The FM software solution allowed them to access and manage information from all location with one tool.*
- *Because they integrated multiple modules, they were also able to manage maintenance requests, track visitors, as well as manage their real estate.*

Since implementation, the company has access to more clear and accurate data that aids them in identifying what processes are working and what needs improvement. Management has saved countless hours of sifting through the paper logs, which has allowed for increased productivity, putting money back into the company budget.

CONCLUSION

Your ability to move everything and everyone forward, day after day, is the true measure of effectiveness and the processes in place can make or break effectiveness. That's why it is so vital to perform regular diagnostics of the systems and processes in place.

In all fairness, no process could be more important than the work order.

If there's a problem, somebody wants it fixed. If there's a need, everybody wants it fulfilled. Follow these guidelines to evaluate the details of your work order process and you'll be on your way to a valuable program that not only empowers your workforce, but will positively affect your company's bottom line.