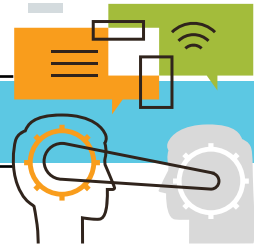# 100+ QUESTIONS

TO ASK YOURSELF WHEN CREATING A WORK ORDER PROCESS

# GETTING TO KNOW YOUR COMPANY'S CURRENT WORK ORDER PROCESS AS A WHOLE

It is important to understand how things are currently handled, how effective these procedures are, and how the workforce feels about the process. This knowledge will be your most powerful tool in developing a new plan of action that is both user-friendly and effective.

1. How does your company currently send and receive service requests?
2. Do you send and/or receive an email?
3. Are phone calls your first method of contact?
4. Has your company implemented a software system to handle such requests?
5. Is your entire workforce approved to send out work orders, or is prior approval from management required?
6. Once submitted, how does the requestor receive updates on progress and completion?
7. How often is the requestor updated?
8. Are any details logged, regarding the complaint and what was done to rectify the problem?
9. Does the technician have the ability to provide suggestions regarding future servicing of the equipment?
10. What type of servicing is most important to your organization?
11. How often are work order requests issued? Daily or on an as-needed basis?

12. How are service requests communicated to the responsible parties?

13. Is there a different process depending upon the type of request (i.e. emergency, repair, or routine)?

14. Once the issue has been resolved, how is this communicated back to the requestor?

15. What details, if any, about the servicing are made available?

16. Where is this information stored and what is the scope of information provided?

17. Where are work orders recorded?

18. Is it in a centralized location?

19. Is the information gathered/stored being used to measure performance?

20. If so, what details are you gathering?

21. What metrics does your organization currently analyze?
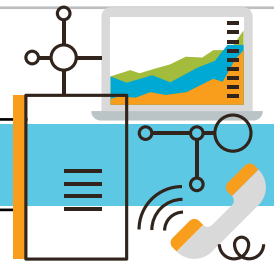
EVALUATING CURRENT ORGANIZATIONAL PROCESSES

Consult with the HR and IT departments, as well as technicians and employees who typically send out work order requests. This will allow you to see things from every angle, strengthening your plan of action.

22. If your method of contact is through phone calls, how is the complaint recorded and who dispatches the information to necessary technicians?
23. If a request is received via email, how is this handled?
24. Does someone from the facilities team receive the email and forward on to the technician?
25. Who records the information throughout the process?
26. Are all emails answered and if so, by whom?
27. Has your company invested in a software solution for recording and dispatching work orders?
    - How is that working for you?
    - Is it user friendly?
    - Who are the approved users?
    - Do your technicians have access to the software and how much information about the servicing are they able to include in the service notes?
28. How important is mobility to your organization?
29. Do you currently utilize a mobile app?
30. How effective is this application and what software systems is it linked to?
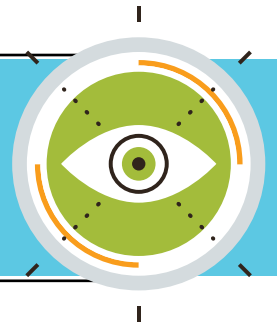
31. If phone calls are your current method of contact, is there a more efficient way to let the requestor know their issue has been resolved?
    - Does your workforce prefer an email response?
    - Do you have a software tool that offers detailed updates, notifying all involved parties as to when the work order is complete?
    - Does this software have the capability of processing and assigning service requests?
    - If your workforce were on the go, would they respond best to mobile applications?
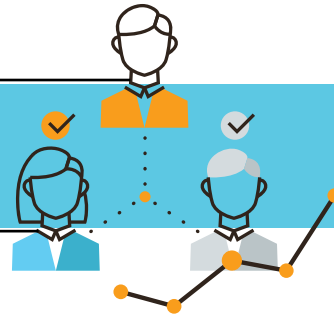
32. Who is approved to submit work order requests?
33. Who responds to these requests?
34. Is your system set up to assign tasks to necessary parties based on the type of work order?
35. How far-reaching are your technicians?
36. Are all issues handled internally or are some outsourced to third party contractors?
37. Are there specialists that respond to issues based on the type of request, location, and priority?
38. Who determines priority?
39. Who is the primary contact when maintenance requests are issued?
40. Does this vary depending upon what work is needed or does it go to one designated person, who then forwards on to necessary parties?
41. How do you ensure they are forwarded on in a timely manner?
42. What relevant details are recorded and made available to help the technician resolve the issue quickly?
43. What details does the technician record and how are they stored?
44. Who has access to this information?
45. Is a reference number assigned to each work order for quick look up?
46. What is your method of confirming the issue resolved to the satisfaction of the requestor?
    - What are the specifics of the work order?
    - 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?
47. What are the overall costs associated with each work order?
48. Are these costs being monitored to ensure all equipment's maintenance is being handled properly?

CATALOGUING THE COMPANY'S CURRENT "ON-DEMAND" REQUESTS:
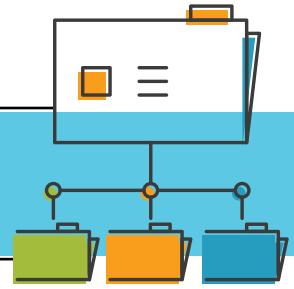
Determine which work order requests are submitted the most and group into categories. Try to limit to no more than 15 categories/groups with no more than 4 to 6 items/request types to choose from per group.

49. Who is the requestor?
50. What is the date, time, and location of each request?
51. What information is important to pass on to the technician and how will this be done?
52. Who dispatches the service requests to the proper technicians?
53. Who monitors the progress and who/what determines when the service ticket is closed?
54. Is a security badge required for access to certain floors?

CATALOGUING THE CURRENT LIST OF PREVENTATIVE MAINTENANCE TICKETS:
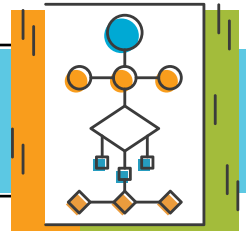
55. How are these requests currently classified?
56. How are they relayed to technicians?
57. What PM requests are submitted the most?
58. What are the costs associated with each service?
59. How many of the company's assets require service requests in between routine maintenance?
60. Which equipment has high costs associated with each servicing?
61. Are there standard operational instructions that can be automatically attached to the PM service tickets?
62. Would it be helpful to add a "comments" section where additional notes can be entered?
63. Does the requestor and/or technician have the ability to attach pictures or documentation about the request?
64. Cull the list and review with your employees to ensure it is complete and user-friendly for maximized productivity.

UNDERSTANDING THE TIME DURATION WILL HELP YOU SET THE STANDARD FOR MEASURING THE EFFICIENCY OF FUTURE REQUESTS:
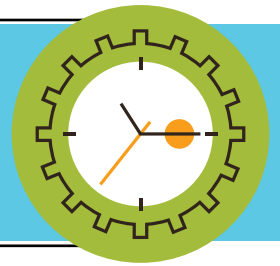
65. What is the total time taken to complete each service request?

66. If the history reveals requests that took longer than they should, where did the glitch originate?

67. Does your company have a service level agreement (SLA) with contractors and technicians?

68. If not, has a standard been set for maximum allowable time required to complete requests?

69. If so, do SLA and maximum times vary depending upon request type?

70. Do your users have the ability to set a priority level or change the due date and/or time?

71. If this is not currently an option, is this something you would like to write into your improved plan?

72. Is there an estimated completion time for requests that you would like to set as a benchmark to measure actual performance?

73. What requests will be on the manual dispatch list?
    - 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 be included?
    - What is the timeframe goal between dispatch and requestor notification?
74. What types of requests will be set up for automation?
75. Who will be assigned to these requests?
76. Are they based on request type, priority level, or location?
77. Are there any automated requests that will require more than one technician to complete?
78. What parameters and guidelines are in place to handle this?
79. Who will handle these duties when the assigned party is on vacation?
80. 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?
81. What additional information would be helpful for the requestor to communicate to the technician?
82. Are there standard operational instructions that can be automatically attached to the service tickets?
83. Would it be helpful to add a "comments" section where additional notes can be entered?
84. Does the requestor and/or technician have the ability to attach pictures or documentation about the request?
85. Should the technician have the ability to close out tickets or would you rather a dispatcher complete the process?
86. Will automated tickets be handled differently than on-demand requests?
87. Who will notify the requestor and how will this process be completed?

88. Who will be running and viewing reports?
89. How often should these reports be run?
90. What types of reporting add the most value to your team? (lists, tables with quantities, or charts)
91. How much detail do you want to see when reporting on Service Request activity?
92. What Key Performance Indicators (KPIs) will you use to measure the performance and health of the submission, execution, and completion process?

A FEW COMMON REPORTS YOU SHOULD CONSIDER INCLUDING ARE:

93. What are the number of requests submitted by location, category, and priority within a specified date range?
94. What are the number of requests submitted by priority and affected unit?
95. How many requests were completed on time (compared to SLA, estimated completion, priority, and date required)?
96. How many requests were resolved upon first contact?
97. How many requests were re-assigned to a new technician (and why)?
98. How many requests were completed per operator?
99. Is there a summary list of completed requests?
100. Is there a summary of closed requests and why were they closed before completion?
101. What is the current number of open requests?
102. What is the average age of current open requests?
103. Run a detailed list of completed requests, with details including: request type, requestor, operator, resolution, time open, cost, etc.
104. How many requests have errors in categorization, assignment, and prioritization?
105. Have the desired output details been input correctly through today?

CREATING YOUR REPORT TEMPLATES:

106. What report type did you decide to use - lists, tables, or charts?
107. How do you want the filters defined? For example: completed date range, location, and requests seen to completion (not cancelled)
108. What fields and measures do you want included in data analysis?
109. Review this with your team members - are there any suggestions for changes?
110. What information do you want viewed in the dashboards?

Being able to work efficiently and productively depends on the effectiveness of your tools and procedures. And, if these tools or procedures aren't performing at top level, the company bottom line will be affected. Automated systems, regular service check-ups, and realistic service timelines are all key elements of a healthy checks and balances system for service requests and associated service operations.

MAKE SURE YOUR SYSTEMS AND PROCESSES ARE AT THE TOP OF THEIR GAME SO YOUR COMPANY IS AS WELL.