



AkitaBox

Ultimate Preventative Maintenance Checklist



ARE YOU READY TO GO FROM REACTIVE TO PROACTIVE?

Preventative Maintenance (PM) can get you there.

Preventative Maintenance is any care or servicing of building assets at scheduled intervals for the purpose of extending longevity, increasing efficiency, inspecting operability or improving up-time.

IDENTIFY PREVENTATIVE MAINTENANCE SYSTEMS

Identification is the first step in any PM plan. Make a list of assets to keep on record in each of your facilities. These assets can include HVAC and mechanical systems, plumbing, and fire and life safety equipment. If you're overwhelmed by which assets you should track, remember these three rules:

- Will it be touched for maintenance at least once annually?
- Will it exceed a replacement cost of 5,000 dollars?
- Would it cause extreme duress in the case of failure?

If you answered yes to any of the above questions, track that asset.

USE A STANDARDIZED NAMING CONVENTION

When buildings are initially turned over from construction, a general contractor may leave behind asset names that made sense for construction, but not facility management. As a result, some buildings may have different assets with the same names. When recording any type of data within your facilities, make sure to adhere to the following:

- Make sure duplicate asset names are corrected (for example, no two Air Handling Units called AHU-01)
- If condensing names of equipment into acronyms, follow established naming conventions laid out by an organization like [The American Institute of Architects \(AIA\)](#)
- Check for any typos within your naming conventions

LIMIT DATA COLLECTION FOR ACCURACY

One of the most important things when collecting data within facilities is knowing what information you're looking for and how much of it to collect. Making a plan before information collection process will keep you from wasting time gathering data you don't need. Create a standardized form for your team to record on and input the following:

- Asset name, unique ID or serial number, type of asset, manufacturer and model, any key parts and location
- Any additional notes that make that asset unique when servicing or maintaining the system

Asset Name

Unique ID

Serial #

Asset Type

Manufacturer Info

Model #

PHOTOGRAPH EQUIPMENT

Recording text data is important for your assets, but photographing each piece of equipment provides a failsafe if any record contains errors. In addition to providing a layer of quality assurance to your records, these photographs can eventually be tied to work orders so that maintenance teams can have a direct visual reference of the equipment they'll be servicing. Best practices when recording equipment include:

- Taking both a full capture of the equipment and close ups of any make or model information
- Capturing the serial number or ID in a close up photo



TRACK ASSET LOCATION

The last step to any PM plan is recording the location of each asset within a facility. This not only speeds up the amount of time it takes for a technician to get to and from a piece of equipment, but also cuts down the amount of time it may take to gather parts for servicing by not having to run back and forth. When recording locations for assets, record the following:

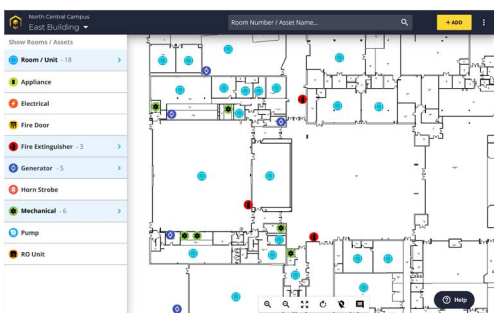
- Building name, floor or level and room, unit or area

Remember!

Capturing this data is only one piece of the proactive puzzle. A powerful computerized maintenance management system (CMMS) can not only hold all of your facility's data, but automate it and reduce the amount of time shuffling through paper or spreadsheets.

A CMMS can also connect the dots between asset data and productivity by incorporating service request and work order systems, essentially eliminating communication barriers between occupants and teams.

To learn more about automating your facility data, visit [AkitaBox.com](https://www.akitabox.com).



About AkitaBox

AkitaBox is the leading FMS and data collection provider dedicated to improving the way people manage and interact with the buildings they occupy. Founded in 2015, AkitaBox currently supplies accurate facility data management tools to over 200 million square feet of educational, healthcare and governmental organizations in the United States. For more information, visit [AkitaBox.com](https://www.akitabox.com).