



Market: Commercial Real Estate

Role: All

Purpose: Best Practices

Best Practices for a Tenant Service Delivery Program

- Workflow processes and states are clearly defined
e.g. New, Open, Arrived, In-progress, On-hold, Completed, Closed, etc.
- Critical **Key Performance Indicators (KPIs)** are established.
- Service request issue types have standardized terminology and lexicons.
- Service request issue types are assigned priority levels.
- Priority levels have established target benchmarks for performance based on workflow states.
- Billable labor rates, associated markups and taxes are associated with each service type.
- Adjustments and exceptions for different building types, locations, leases and/or tenants are documented.
- Service request assignment rules are clearly defined for both internal personnel and external service providers.
- All service request priority levels have established target benchmarks for performance based on workflow states.
- Current performance metrics are reviewed to understand performance improvement opportunities.
- Process and system in place to generate analytics surrounding KPIs and ongoing performance against targets.
- Escalation notifications and re-assignment rules are configured properly in the designated operations system.
- All personnel (internal and external) are properly informed of expectations and trained on processes and systems.
- Exceptions/escalations are managed **"in the moment"** by senior management.
- Performance-based remediation and reward process established.

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Score Card: Count your checks.

Less than 9 means you may lack visibility into your service program. Request a conversation to learn more about utilizing OPM to document and assure service delivery.



PREVENTIVE MAINTENANCE CHECKLIST



Requirements for a Modern PM Program

- Web-Based System.** Do you have modern property management software that provides the Preventive Maintenance (PM) tools, automation and visibility needed to assure that 80% or more of maintenance activities are planned and scheduled at least one week in advance - making dispatching tasks simple and ensuring timely completion?
- Established Equipment Library (Based on Industry Standards).** Are you using a task library based on recommendations from the General Services Administration (GSA)? Many legacy libraries offer equipment guides with aggressive frequencies of PM tasks that are often redundant & inefficient. The GSA recommendations are designed with more relevant target benchmarks to help with staff levels and productivity assessments.
- Mobile Access.** Is your team able to create and complete maintenance tasks from any mobile device or tablet? Can they work offline in areas of little or no service? Are they easily able to view prioritized task lists and equipment histories from the palm of their hand? Your mobile component should also seamlessly connect (and send data) to other areas of your operations like Work Order and Inspections.
- Performance Management.** Can you set standards and maintenance schedules that are regularly monitored? Do you have the ability to analyze work order history and equipment breakdowns? Basic reporting is critical. You should be able to pull equipment summaries, completion summaries, inventory reports, warranty expirations and more.
- Automated Alerts and Notifications.** Scheduled maintenance notifications and assignments should be automated. Are yours? This is where a native Mobile App becomes really effective, with immediate and clear notifications delivered to your team wherever they are in the building.
- A Centralized View.** The number of tasks involved with effective PM can be overwhelming. Do you have an easy-to-read dashboard to provide a clear overview? At any point in time you should be able to see what tasks should be worked on first, which are critically overdue, and what's coming up next.
- Link to Purchasing & Inventory Tracking.** Are you able to simply track your inventory, and set automatic re-order alerts when supplies are low? Can you create purchase orders directly from a PM task to reduce work order "on hold" time? Ideally, you should be able to select materials to order, indicate quantity, update "expected costs," and print purchase orders to deliver to your vendors.

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If you said no to even one of the evaluation questions above, your PM Program could be holding you back - and costing you money.

Building Engines Checklist

Analyzing Building Operations

Achieve “Best in Class” Operational Excellence

Tenant Service Delivery:

- We have set & communicated standards for response times
- We have an automated request, notification and assignment system
- Our customers have visibility into the progress of work orders
- We measure customer satisfaction regularly and proactively

Assets & Maintenance:

- Equipment records are readily accessible
- Maintenance and spend are tracked
- Maintenance is performed based on business impact
- Scheduled maintenance notifications and assignments are automated

Risk & Exposure to Liability:

- We have detailed emergency preparedness documentation
- Documentation is online and provided in advance to first responders
- We conduct regular table top training exercises
- We maintain accurate and up to date COI records

Online Real Estate Operations:

- We are eliminating use of spreadsheets
- We are automating manual, mundane building operations processes
- Our applications are “in the Cloud” and accessible anywhere, at anytime
- We are consolidating “siloesd data” into a centralized database
- Communications and collaboration are ubiquitous and in real-time

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Less than 9? Call Building Engines today and learn how we’ve helped over 350 clients like you achieve “Best in Class” operational excellence!

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