

# SERVICE REQUEST WORKFLOW OPTIONS

## 1. Desk Quarterback

**Description:** Management team personnel is responsible for collecting service request details from tenant and managing distribution (assignment) and communications for the lifecycle of the request. It may be an all-manual process or include some technology elements.

**Best Fit:** Class B or C, Multi-tenant, Retail/Industrial

**Advantages:** Control. Generally will have complete information from initial request. Opportunity to verify data at multiple steps. Low or no additional costs outside of personnel/staffing.

**Disadvantages:** Multiple staff "touches" not optimal for response times or accurate capture of WO lifecycle. Limited visibility. No meaningful, real-time data. Subject to error and response delays if key personnel is unreachable. "Low tech" perception from tenants and staff.

**Other Factors:** Low/nominal service expectations; Not a high volume of tasks; Lease structure places most responsibility for service requests on tenants; Minimal on-site staff or remote/roving staff



## 2. Chief Engineer Quarterback

**Description:** Similar to above, with the primary difference being that the initial communication step (from the tenant requestor) or secondary (from the tenant coordinator) is delivered to the chief engineer in a property, who then assigns the task to a member of his team (or outside contractor) for completion.

**Best Fit:** Class A, Multi-Tenant Commercial Office, Medical Office, Campuses

**Advantages:** Control. Assignment to the right person for the job. Increased likelihood that the assigned technician will have the right tools for the work upon arrival.

**Disadvantages:** Lack of management visibility. Multiple touches and dependence on physical dispatch can result in delayed response. Difficult to obtain consistent quality data to provide insight into real performance.

**Other Factors:** Significant on-site maintenance staff; Maintenance teams organized by trade or skill sets; High tenant service expectations, but may not have most recent technology in place (smartphones, software, etc.).



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## 3. Mobile Quarterback

**Description:** For organizations not quite ready for Direct Assignment (below), the Mobile Quarterback receives all service requests and then uses mobile device to dispatch to the appropriate technician (or outside contractor).

**Best Fit:** Class A or B, Multi-Tenant, Commercial Office, Medical Office, Campus Environments

**Advantages:** Increased speed/responsiveness over manual methods or Desk Quarterback. A measure of control and ability to verify initial data by responsible staff member.

**Disadvantages:** Associated technology costs (requires investment in a software platform and smartphones). Still subject to delayed response. Difficult to obtain true measure of performance because of multiple touches.

**Other Factors:** Good-size maintenance staff. Maintenance teams organized by trade or skill sets; High tenant service expectations; Has current mobile technology in place and supporting integrated software systems.



## 4. Direct Assignment

**Description:** A service request is submitted via web or mobile device by the tenant requestor and the details are delivered directly to the responsible technician (or vendor), who acknowledges, accepts and manages the request and communications throughout the full work order lifecycle. This process requires the right pieces of technology, including an advanced online work order system extended to a mobile application (accessible on a smartphone or tablet).

**Best Fit:** Class A & B, Multi-Tenant, Commercial Office, Medical Office

**Advantages:** Eliminates typical wasted steps in a workflow process. Allows for shortest work order service completion times and optimal staff productivity. Creates best opportunity to create performance benchmarks for each stage of the request lifecycle. Allows for best data collection and visibility into overall team and individual performance. Creates opportunity for management team to use process and data/results as a competitive differentiator in securing new business.

**Disadvantages:** Less opportunity to verify initial submission data, ask for additional details. Very dependent upon quality of technology services in place. Associated technology costs. Requires strong vendor/partner relationships. Possible “big brother” pushback from staff.

**Other Factors:** High level of service expectation; Company brand associated with quality service; Data-driven performance metrics are important; Management office staff and maintenance teams work well and coordinate activities together; High billable service component to work provided.



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## 5. Mixed Blend

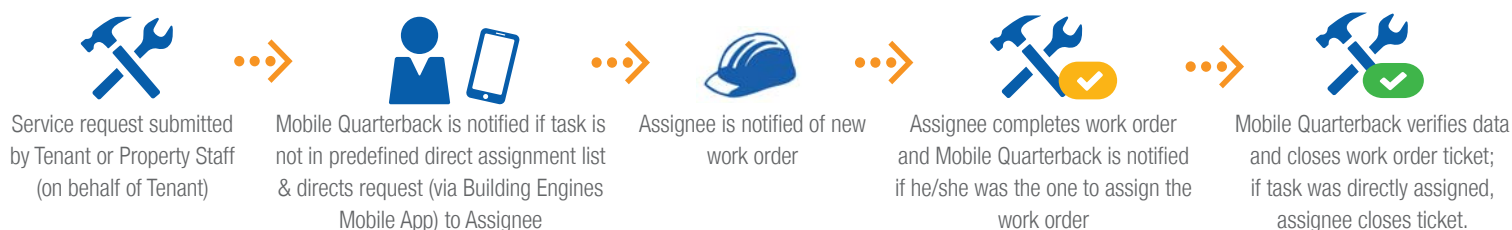
**Description:** A combination of the Quarterback method together with the Direct Assignment. This is utilized in situations where some issue types can be directly assigned, while others may need further evaluation based on specific skill sets required or, potential associated costs. Again, there are technology requirements in order to make this process work.

**Best Fit:** Class A & B, Multi-Tenant, Commercial Office, Medical Office

**Advantages:** Allows for some “in the moment” decision making. Staff feels more connected to certain types of issues/requests.

**Disadvantages:** Some loss of ability for efficiency and highest level of response. Added levels of workflow complexity. Inability to benchmark and measure performance on the Quarterbacked issues.

**Other Factors:** Generally a number of issue types with unique characteristics; Complexity with some billable service components; Approvals needed for certain types of work or billable amounts.



## 6. Team Dispatch

**Description:** This is a variation of the Direct Assignment process whereby tenant service request submission details are delivered simultaneously to a pool of available technicians and the person who is available or in the best position to manage the request “grabs” it and the other people in the pool are notified. Once again, this process requires the right technologies in place in order to work.

**Best Fit:** Class A, Multi-Tenant, Commercial Office

**Advantages:** Creates opportunities to identify star performers on maintenance team. If diligent, creates opportunity for closest technician to the request area to do the work.

**Disadvantages:** Not conducive to getting the “right person” to the “right job.” Service quality ratings may suffer. Can lead to “job grabbing” by technicians to help boost profile.

**Other Factors:** Significant on-site maintenance staff; Maintenance teams organized by trade or skill sets; High tenant service expectations, but may not have most recent technology in place (smartphones, software, etc.).

