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.

✓ **Score Card: Count your checks.**
If you said no to even one of the evaluation questions above, your PM Program could be holding you back - and costing you money.