

Analytics of your Work Orders:

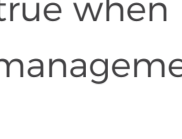
ONE BITE AT A TIME



How to avoid work order management overwhelm: one step at a time

Work order management can seem an overwhelming task: how to prioritise projects, and get onto the proactive tasks, when you're constantly firefighting? And how do you begin to get visibility of how effective your team really is? Kate Mulligan, Director of SPM Assets United States, shares her insights.

There's a quote by Creighton Abrams, a US army general, that states:



"When eating an elephant, take one bite at a time."

Please, don't dine on these amazing animals!

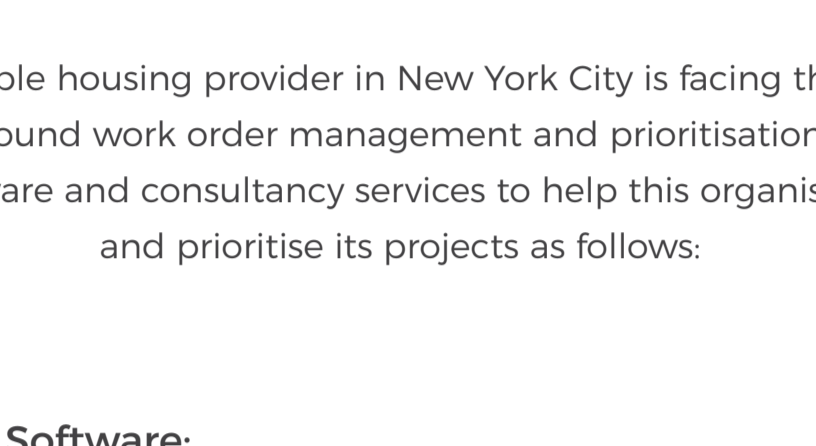
Rather, it's advice on how to tackle big, overwhelming projects: one small piece at a time. And that's particularly true when it comes to creating an effective work order management process.

But how do you even begin to analyse your work order management process when your team is overwhelmed with work?

Our clients repeatedly tell us that they would love to be able to plan proactively, but the reality is that time and resource constraints make it very hard to get to that space. Especially when there's already a backlog of work, and there are new proverbial fires to put out, every single day.

A drawback of work order management systems is that they often lack strong analysis tools, which makes it difficult to understand and track what's really happening. With just a long list of jobs in the system, it's hard to know which tasks need attention right now, and which projects can be deferred to a later date.

Example: an affordable housing provider in New York City



An affordable housing provider in New York City is facing these exact challenges around work order management and prioritisation. SPM Assets provides software and consultancy services to help this organisation unravel and prioritise its projects as follows:



Software:

The organisation's work orders are transferred into SPM Assets software, and then analysed using the Project Planning module. This allows the work orders to be grouped, sorted and prioritised, so the client gets better visibility of where the focus needs to be.



Consultancy:

SPM Assets works with the client to:

- Outline the organisation's priorities.
- Establish how work order management is currently being addressed. How are work orders currently being prioritised? How are resources allocated? What parts of the process are working well? And what isn't working so well?
- Assess the strengths and weaknesses of the current process, as well as of the team.
- Establish how much of a change the client is willing to make to address the challenges around work order management.

The goals of the work order analysis are to:

- **Current situation analysis:** Understanding the on-the-ground realities that the team and organisation are facing.
- **Create some calm:** Dealing with fires so teams have space to breathe. For example, if housing codes aren't being met and there are violation fines, let's identify and action those first.
- **Prioritise beyond the urgent:** Suggestions on how an organisation can prioritise its work orders, and identifying where the focus needs to be, not just now, but also in the months and years to come.
- **Align resources:** Evaluating a team's strengths and weaknesses, as well as the current capacity. This provides some clarity on how effectively individuals – as well as the team as a whole – are performing, and paves the way to measuring performance. It also means that any resource gaps can be filled. Do you really know for sure if your team is over resourced or under resourced? A methodical analysis like this gives you a clearer understanding, and ensures that appropriate budgeting and resourcing decisions can be made with confidence.

Track all your projects in one location and easily allocate and prioritise your work orders to the best team

Comp. group	Comp. type	Component	Location	Base life	C1	C2	C3	C4	C5	Qty	Unit	Repl. cost	Cond. conf.	Qty. conf.	Rate conf.	Bel.	
Services	Mechanical	Air Separator	Boiler Room	20	99	-	-	-	-	1	1.00	each	\$725	E	E	E	<input type="checkbox"/>
Services	Sanitary Plumbing	Boiler / Venturi	Restroom	25	99	-	-	-	-	1	1.00	each	\$1,154	E	E	E	<input type="checkbox"/>
Services	Mechanical	Boiler	Boiler Room	30	99	-	-	-	-	1	1.00	each	\$5,280	E	E	E	<input type="checkbox"/>
Services	Mechanical	Boiler	Boiler Room	25	99	-	-	-	-	1	1.00	each	\$37,224	E	E	E	<input type="checkbox"/>
Services	Mechanical	Burner Controls	Boiler Room	20	99	-	-	-	-	1	1.00	each	\$742	E	E	E	<input type="checkbox"/>

Code	Name	Year	Description	Cost
48854	Boiler	2018	Boiler over-heating	\$850
53355	Boiler	2018	Problem with Boiler 2	\$450
53485	Boiler	2020	Boiler Shield Combustion Repair	\$550
53831	Boiler	2018	No hot water, had to call tech.	\$1,200
53976	Boiler	2018	No hot water	\$0

Maintain all the work history against the specific component to make more informed decisions on repair or replace in the future to optimise your spend

At SPM Assets, we are finding that these issues, challenges and opportunities around work order management are a common theme among housing providers. A 12-step approach has been created to help improve the work order management process.

12 steps to improving the work order management process

These 12 tasks will help you tackle your work order management process, one step at a time:



1. Analyse and group existing work orders. For example, how many work orders relate to each of the following: appliances, boilers, carpentry, doors and locks, electrical, fire safety, heating, paintwork, plumbing, windows, and so on.
2. Identify the priorities, in terms of projects, as well as the overall work order management approach.
3. Understand the currently available resources, including the strengths and weaknesses.
4. Create Programs of Work (PoW) to keep teams fully mobilised. Plus, identify if there are opportunities to group similar types of works to provide cost and time efficiencies with economies of scale.
5. Find the best team for each work type. Activate current teams, and source vendors to cover skills or capacity gaps.
6. Understand funding.
7. Schedule the Programs of Work based on funding and resources.
8. Identify an overall Project Manager responsible for managing the programs as well as the overall work order management process.
9. Establish reasonable monthly KPIs, based on work and teams.
10. Notify tenants where necessary to carry out the work orders.
11. Commence the work.
12. Track progress on the work orders every month, as well as reviewing progress of the overall work order management process. Troubleshoot any barriers, and amend the process as necessary.

Outcomes

Imagine a scenario where:

- Work orders are prioritised.
- You have a better understanding of your team.
- You have a better understanding of your priorities.
- A long-term execution plan is in place that provides a roadmap and direction.
- You have confidence in knowing that you and your team are spending time on the right work, at the right time, and making a difference to your tenants.
- Your team will be happier and more motivated: they feel like they can breathe again, because they're on top of their work more than ever before.

... It's possible! You just need to do it step by step, and consider investing in some help to get you there.

Next step

Contact us to see how our team can help your organisation meet its objectives through smarter work order management.

Contact us