FM Best Practices for

HEROIC WORK ORDER MANAGEMENT
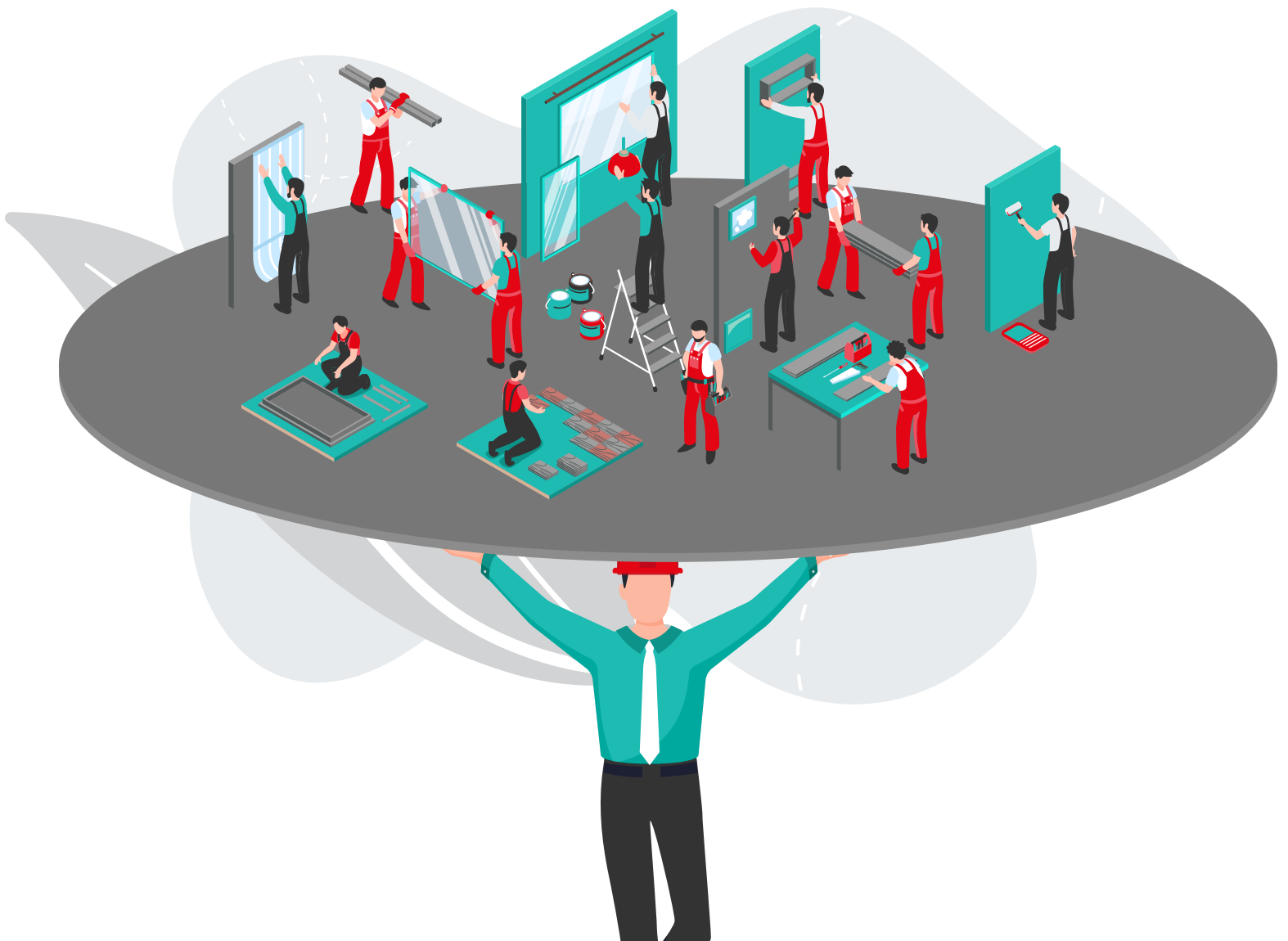
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Successful facilities managers (FMs) have to be expert multitaskers, often managing multiple work orders while tracking project timelines, completion dates, costs, downtimes, and the status of vendor payments. However, monitoring all of these tasks simultaneously across geographically dispersed locations can take a toll on even the most formidable facilities manager (FM).

For example: Imagine handling 378 work orders in a single day—that actually happened to one FM last year! That might sound like a herculean task, but if that backlog was mostly routine, simple automation could've resolved many of those open work orders.

There is a better way.

A work order management (WOM) solution can help you become your own FM superhero.

Control your WOM program

Taking control of your entire program requires visibility into your assets, facilities, vendors, and every stage of your work orders. Any gaps or blind spots can cause inefficiencies. Select a WOM platform that can:

- Connect directly with service pros

- Manage service request routing

- Schedule preventative/routine maintenance and expedite reactive work orders

- Set standard not-to-exceed (NTE) limits and dynamic NTEs

- Manage and validate certificates of insurance

- Obtain accurate vendor/technician times on-site

- Verify work completion

- Automate invoicing and remittance with your financial systems
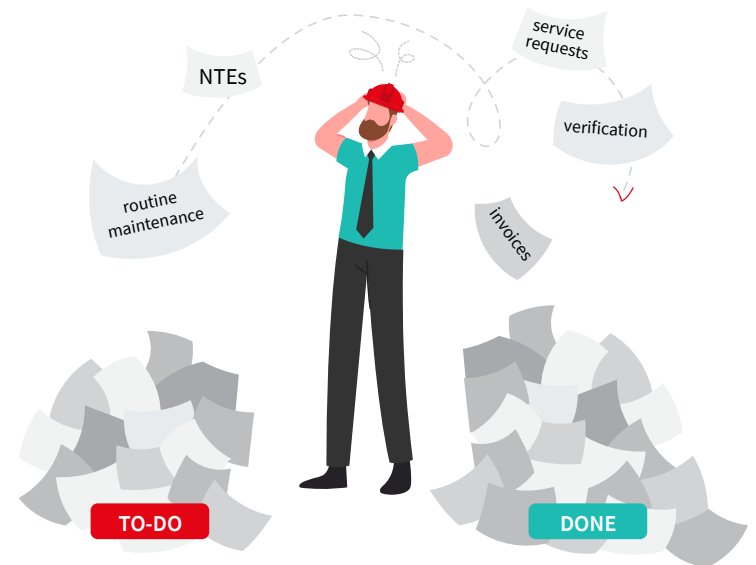
Complete control of your WOM also includes monitoring service requests from end to end and ensuring repairs and maintenance are completed in accordance with service level agreements.

A major challenge for FMs everywhere is knowing when service providers are on-site and for how long. A good WOM solution gives FMs and site managers the convenience of verifying job status via GPS check-ins. The platform also maintains a complete, auditable history of service requests to ensure accuracy and transparency. Having a record of who did what and when is essential for vendor compliance and resolving disputes.

Replace routine tasks with superhero work

Do your maintenance calls ever feel like a never-ending series of disconnected one-off events? Your WOM solution should be able to process, automate, analyze, and optimize every task. The more efficient your WOM is, the more value it delivers—and the more your heroic reputation grows.

Your WOM solution should allow you to:

- Process work orders at scale and in real time

- Automate task routing and tedious processes, like waiting for approvals

- Report vendor/technician arrival on-site

- View first-call resolution

- See compliance with check-in/check-out procedures

- Display average job cost broken down by service provider, trade, asset, and geography

- Capture performance criteria separating your top vendors from the rest

You'll never get to superhero work—the kind that boosts efficiency, asset performance, and cost-savings—until automation and task routing take charge of routine, low-level tasks—and do so at scale.

For example, a good WOM solution can manage hundreds of thousands of work orders per day in real time, across a distributed footprint, and with visibility into each stage of the WOM process. Triaging separates common tasks from emergencies, so you're able to more efficiently allocate resources and reach faster resolutions. You get your time back to devote to more complex tasks and the heroic work that results in greater operating performance.

Automate your work order processes

Few things are as frustrating as manually fielding hundreds of work orders that could have been managed and resolved through automation. A WOM platform should allow you to automate recurring services and reactive repairs by routing them to your preferred technicians and appropriate vendors. This means faster completion times and fewer repeat visits.

Automating low-level work creates more time for high-priority work orders for complex or costly assets. Free from processing routine work orders, FMs have more time for higher-level work that produces deeper insights—such as identifying the assets that generate the highest service expenses and judging whether they're in line with market norms.

Small, consistent time- and cost-savings grow your bottom line. A dispatch board, for example, provides building occupants with troubleshooting guidance *before* they create a work order, which prevents needless service calls and ensures the right service provider responds to each request.

With a WOM solution that can process millions of work orders per year, small savings on each work order produce substantial savings overall.

Choose a mobile-friendly WOM solution

FMs and their team members are rarely at their desks, due to the reactive and fast-paced nature of their work. They may spend a good portion of their days at remote locations or on the road and need to be able to initiate, assess, and document work orders without having to return to their desks.

A mobile-friendly WOM solution is required for an efficient FM team to:

- Receive work orders

- Download asset information

- Provide status updates

- Take photos before, during, and after completion of the work

- Communicate with material/ equipment suppliers, service providers, engineers, etc.

A mobile app must be intuitive and easy to learn for FM teams and their vendors in the field. During a busy week, the app becomes the default communication, transaction, and monitoring channel for hundreds of open work orders.

A mobile WOM platform enables FM teams and other stakeholders to save time by managing work orders on the go, using technologies that offer considerable convenience and efficiency. As a result, they have more time to focus on business-critical tasks.

Employ warranty tracking

Keeping track of assets under warranty is vital to controlling costs, but it's time-consuming for managers of large or multi-site facilities. Warranty management is often an inefficient, paper-driven process that results in unnecessary payments for warrantied work. An effective WOM solution automatically reviews and flags active warranties, potentially saving you millions of dollars.

Your WOM platform should automatically alert FMs when warranties are active and identify the service provider responsible for the work. In some cases, warranty tracking functionality saved users an average of $1.5M over three years.

Move from reactive to proactive work

Your WOM system should save you time, so you can focus on forward-looking tasks, like allocating resources for preventative maintenance. Plus, transitioning from reactive to preventative maintenance can lead to major savings. A recent analysis revealed that an **average preventative maintenance work order costs $400 less than a reactive one.**

A WOM platform can optimize your preventative maintenance spending down to the equipment level. Maintenance records, costs, and dates are organized and readily available to help you make informed repair/replace decisions, which is essential for responsible asset management. Preventative maintenance streamlines and extends the useful life of buildings, machines, and equipment.

Ensure payment accountability

A robust WOM platform offers pre-built invoices for preventative and routine maintenance, and work is scheduled at contracted prices. Automation saves time every month by eliminating inefficient, manual invoice processing.

Look for the following payment automation features in your WOM platform:

- Time on-site validation

- Pre-built invoices aligned with project manager schedules

- Locked rate cards

- Warranty tracking

- Automated enforcement of NTE limits

- Incomplete work monitoring and verification

- Sales tax verification

According to the 2021 commissioned Forrester Consulting study, "The Total Economic Impact of Corrigo™," customers who employ payment accountability save an average of 3–5% on every invoice processed and see time-savings of up to 75% for electronic invoicing.

Capture data insights

Your WOM platform should help you become smarter about your work order costs, resolution times, NTEs, service providers, equipment, and warranties. It ideally includes reporting and analytics that allow you to organize work order data and deliver insights you can use to streamline your operations—the lifeblood of FM. Without it, jobs simply won't get done, and facilities and assets may become inoperable, while costs skyrocket.

That's why choosing a platform that helps you save time and money—while also providing better data and insights into your operations—is key to working smarter and being the hero of your work order management.

Note! Help is available for automating and accelerating the many steps from work order creation through completion. Contact Corrigo Managed Services today to discover how our team of experienced, professional facilities managers can fast-track your path to heroic work order management!
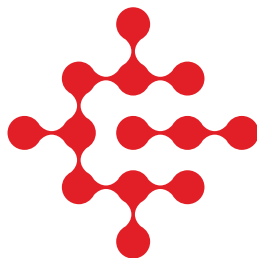
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