Fexa

Upgrading from Manual Systems to Facility Management Software

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Introduction

At times, manual systems and processes can feel like chaos.

For facility, maintenance, and operations managers, balancing a wide range of responsibilities that come with running a modern business is challenging. Despite building technological advancements, many facility managers rely on manual, disparate systems like spreadsheets, project management software and paper records to manage their maintenance processes. FMs on manual systems often have to conjure up "data stories" from sheer memory, realizing that this is likely a source of wide-spread inefficiency that ultimately costs time and money. It's no surprise then that transitioning to a purpose-built, modern facility management software can significantly streamline operations, improve efficiency and leverage resources.

In this article, we will discuss **why converting from manual processes to dedicated facility management software is essential** for companies looking to integrate communications, drive process efficiencies, track and report on critical data, and get everyone on the same page.

A Day in the Life of a Facilities Manager

In the course of a single day, a facilities management professional wears many hats! They must:

- ✓ Be an extraordinarily efficient **Project manager;**

- ✓ **Manage work orders & dispatch maintenance** technicians to address a myriad of work;

- ✓ **Manage response times** for critical reactive repair to support the brand's image;

- ✓ Optimize **preventative maintenance** activities to achieve balance in value;

- ✓ **Understand a broad array of trades** at some level to make critical decisions;

- ✓ **Make wise repair vs replace** asset management decisions;

- ✓ **Maintain actionable asset tracking data** (sometimes unaided by a purpose-built software solution);

- ✓ **Answer questions** and interface on projects from finance, construction, planning, store operations;

  And so much more!

Manual Systems: What They Are and Why They are Limiting

What are Components of "Manual Systems"?

Anything that isn't specifically designed for the purposes of facility or asset management can be considered parts of manual systems, although some can be more tedious to use than others. Many facility managers currently rely on various manual tools to manage their operations, including:

- Spreadsheets
- Paper-based filing systems
- Hand-written notes / sticky notes
- Ad hoc, people-initiated calls, texts, and emails
- Online and paper calendars
- Manual reminder processes
- Project management software
- Ticketing systems

However, using these tools can have a far-reaching consequences, leading to inefficiencies, missing data and data errors, miscommunications, missed maintenance deadlines, poor planning and problematic strategic decision making based on missing or incomplete current and historical data.

Disadvantages of Using Manual Systems and Processes

Communications

People-initiated communications, such as phone calls, emails or texts, can be cumbersome, disjointed, or even forgotten, making it harder to track over time. Individuals have preferences about how they like to receive communications (i.e., emails vs. texts), and what types of communications they want to be sent or copied on (i.e., all messages, emergency only, etc). Manual processes provide no solution to deliver the right message to the right people in the right format, at the right time.

Data Loss, Retrieval, Consolidation

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Human error and lack of tracking and accountability

Human error brought about by manual data entry and calculations can lead to a lot of inaccuracies and mistakes. In addition, manual systems would typically not have timestamps, activity streams, or space for notes, making it difficult to track and hold individuals accountable. The use of manual systems can also lead to poor spending or missed opportunities to optimize profits. All of these things affect the quality and control of work orders.

Inefficiencies in local vendor selection

When a service request comes in, the manual process of searching for a right-fit local vendor in the market that also has the proper insurance can be overly time-consuming. Without an automated system in place, facility managers have to perform research and checks manually and risk running into human errors and bottlenecks. A purpose-built solution can provide the convenience of using a map view that shows nearby vendors, verifies their compliance with insurance requirements, and can even auto-dispatch work orders to confirmed vendors, making it faster and easier to perform this task and mitigate risk.

Fragmented and uncoordinated workflows

Without seamless data integration between maintenance projects and work orders, facility managers are challenged in coordinating, estimating, proposals, and invoicing processes.

Limited access to visual documentation

Manual processes hinder the easy sharing of service-related information and photos, reducing collaboration and visibility for all stakeholders involved. Manual systems prevent auditing and viewing each step of work order history, including who touched the work order, when, and what they did — activities that bring real accountability to the entire maintenance lifecycle.

Potential accounting errors

Absence of GL (General Ledger) codes for vendors and customers or improper linkage of costs can lead to inaccuracies in expense tracking and financial management.

What Are the Benefits of Utilizing Purpose-Built Facility Management Software?

Clearly, manual processes can quickly become time consuming and disorganized; sinking precious hours into data entry, manual communications, and document management – making it difficult to stay ahead of schedule, on track, and collecting a holistic view of the maintenance landscape for informed decision making.

What does a "purpose-built" software offer? **Purpose-built software offers a solution that is designed to address the specific needs of a particular function, in this case multi-site facility and maintenance management**. A purpose-built solution is optimized for specific workflows, and to streamline processes, improve efficiencies, and enhance productivity for facility management, asset management, work order management, maintenance – especially repair or replace decisions – conversion of business logic into workflows and automations, vendor management, and analytics and reporting.

Here's why the use of purpose-built, facility management software can be a game-changer for multi-site businesses:

Data-driven decisions

By accessing operational and financial data more efficiently, businesses gain valuable insights that can lead to better decision-making. This can result in improved profitability, making the software an asset for both provider and operator companies.

Streamlined operations and scalability

Enhancing the ratio for managing work orders to users greatly improves efficiency, allowing for a larger number of work orders per staff member. This scalability empowers businesses to grow without increasing headcount or even redeploy existing staff into more strategic roles.

Overcoming workarounds

Purpose-built facility management software minimizes the need for workarounds, enabling businesses to increase efficiencies significantly. By eliminating reliance on spreadsheets and emails, companies can achieve operational excellence and evolve seamlessly as new company concepts and unique business challenges arise. This flexibility is particularly important in addressing emerging issues like environmental, social, and governance (ESG) initiatives.

Streamlining maintenance and costs

Regardless of whether you're an operator or a vendor, managing various types of assets can be challenging. However, by integrating these tasks into a work order system, tracking maintenance instances and costs becomes considerably easier. This streamlined approach allows office staff, store staff, and local providers to contribute information on repairs and costs, ultimately optimizing asset management and providing valuable financial insights.

Asset management made easy

Your facility management software becomes the hub for managing different assets, from HVAC equipment to back-of-house restaurant equipment. Keeping track of maintenance instances and costs is made considerably easier, helping businesses decide whether to repair or replace assets as they reach their life expectancy.

Streamlined invoicing

Integrating the facility management software with accounting platforms simplifies the invoice process. By including all necessary details (even tax calculations for vendors) and automatically generating the necessary information for invoicing, businesses can process invoices more efficiently and accurately.

Mitigating risk

Automating processes within the facility management software ensures that local service providers have valid certificates of insurance before they are dispatched. Additionally, the ability to capture photos of unsafe conditions or confirm safe premises provides valuable support for risk management.

Improved vendor management

Facility management software provides a centralized platform for managing vendors and their activities. Easily track vendor performance, ensuring timely service delivery and adherence to contractual obligations. Know at a glance if a vendor showed up, completed the job satisfactorily, or if any follow-up is required. Say goodbye to guessing and chasing down updates.

Seamless contract management

Managing pre-negotiated contract rates can be a challenge with a manual system. Facility management software offers a centralized repository for storing and managing contracts, ensuring visibility into agreed-upon rates and terms. Easily monitor compliance and track renewal dates, empowering you to make informed decisions and avoid costly surprises.

Data insights

Data is power. Facility management software provides you with comprehensive and real-time insights into your facility operations. Gain valuable analytics and reporting capabilities, helping you identify trends, optimize resource allocation, and make data-driven decisions. Harness the power of data to continuously improve your facility management practices.

Increased reliability, faster workflows and better data management

Because you can automate and streamline processes, the need for manual tracking and data entry is eliminated. Managing all data in the system becomes as simple as entering an ID number. This allows easy access to location functions, history, and trade services. All of this translates to significant time savings, allowing your team to focus on more strategic initiatives that drive business growth. Over time, this also increases your reliability as a business.

Response of facilities manager who is still stuck using spreadsheets and workarounds with current solution:

"When we get alerted to the need to fix the toilet at a facility, like Location#0051, we only know that we've been out there four times in the last two months if we have a sticky note reminder taped to our monitor. This does not scale and it is costly for the company."

Sr Facility Manager, Retail Company (Currently using spreadsheets & email to manage work)

While this seasoned facilities management professional is able to conjure up the "data story" from sheer memory, he knows all too well that there has got to be a better way. He intuitively knows that if they had a purpose-built facilities management and asset management solution to capture and analyze that data in context, and when it is needed to inform immediate decisions that it could yield the business great benefits.

That astute FM also knows that this is one small example of literally hundreds of micro examples of inefficiency and lost opportunities that happen every day and costs the business time, money, and even brand reputation.

What Are the Signs That it's Time for you to Automate with Purpose-Built Software?

Needing to increase headcount because of overwhelming workload

Your facilities management team is overrun with projects, planning and backlogged maintenance issues, and your company's growth is becoming overwhelming. You need a powerful solution that can grow with you to manage the workload, without adding headcount. There's an evident need to hire additional staff to keep up with manual and clunky work order management processes.

Lack of a cohesive project management program

Not having a proper PM program leads to a reactive approach as things come up, which is not sustainable. This can result in potential cost increases and critical issues slipping through the cracks.

Keeping up with integrations

If you're a vendor working with multiple clients using other FM systems, you may be struggling to keep up with updates and integrations due to limitations in your current system. If you're a facility, you may need integrations to multiple vendor systems in order to work with them effectively, especially for accounting purposes.

Vendor management challenges

Without automated communication functionality, you will lack enhanced dispatching capabilities, confirmation of approvals, or visibility into turnaround times to meet SLAs (service level agreements).

If you're dealing with these challenges currently, then consider a purpose-built facility management solution that can offer benefits such as flexibility, custom field tracking, sophisticated automation and workflows, system integration, integrated project management, and reporting and analytics.

Doing so can help you stay ahead of changes in the industry, centralize information in one repository, and maximize your FM operations with minimal disruption.
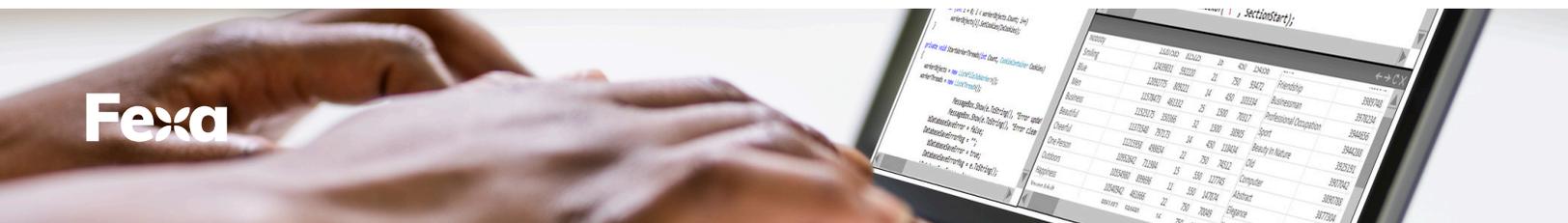
What's the ROI?

The ROI of switching to a facility management software varies depending on factors such as the size of the team and the amount of time spent on manual processes. For companies starting from scratch, the ROI can typically be achieved in under a year, and even slightly faster if they are transitioning from subpar systems and total manual processes.

It's also important to consider how much time the facilities team could be saving per week if they adopt a facility management software, and estimates typically suggest that teams could save 10-15 hours per week with an easy-to-use and adopt facility management software in place.

Considering the Transition? Here's Some Tips

As has been discussed so far, there are numerous benefits to implementing a purpose-built facility management software. Here are some strategies to experience a successful implementation process:

- **Involve all stakeholders from the very beginning.** There's bound to be some resistance to change, as transitioning from manual processes to purpose-built software may face resistance from those accustomed to traditional methods. You'll need effective change management strategies for this. In addition, people from different departments will have different concerns and requirements for the software. By getting everyone on board and addressing their concerns upfront, you'll be better placed to create a solution that works for everyone.

- **Choose a solution that's tailored to your specific needs.** There's no need to pay for features that you won't use, so finding a software solution that's customizable and modular is a great option. Especially if you're just starting out, you'll need a solution that will grow with you as your business needs evolve and acquire complexity.

- **Ongoing training and maintenance of the software.** Implementation and maintenance is key to setting your team up for success with any software and maximizing its benefits. Regular check-ins with staff and management can help to identify issues before they become a problem and keep everyone on the same page as the software evolves.

Conclusion

Embracing dedicated facility management software is crucial for companies who have optimizing their maintenance processes to drive better performance as an organizational goal. By moving away from manual systems like spreadsheets, calls, and people-initiated emails, facility managers can streamline their operations, improve communication, enhance overall efficiency, and save time and resources. With the right software in place, facility managers can successfully navigate the challenges of running a modern business and ensure smooth and effective facility management.

At Fexa, we apply a mindset and focus on delivering a modern, innovative, software solution specific to the real-world challenges and opportunities faced by multi-location facilities. Converting from manual processes to facilities management software may seem daunting at first, but the passionate and dedicated Fexa team makes the transition smooth and manageable.

Find out how purpose-built facility software can drive efficiencies, provide visibility, and save resources: **https://info.fexa.io/lp/fexa-request-a-demo**

About Fexa

Fexa delivers advanced facility management software tailored for multi-site businesses. Our highly configurable CMMS platform helps companies streamline operations, ensure compliance, and boost efficiency. Trusted by leading brands like Dollar General, Five Guys, and Crate & Barrel, Fexa supports nearly 2 million locations daily.

Learn more about Fexa at **fexa.io.**