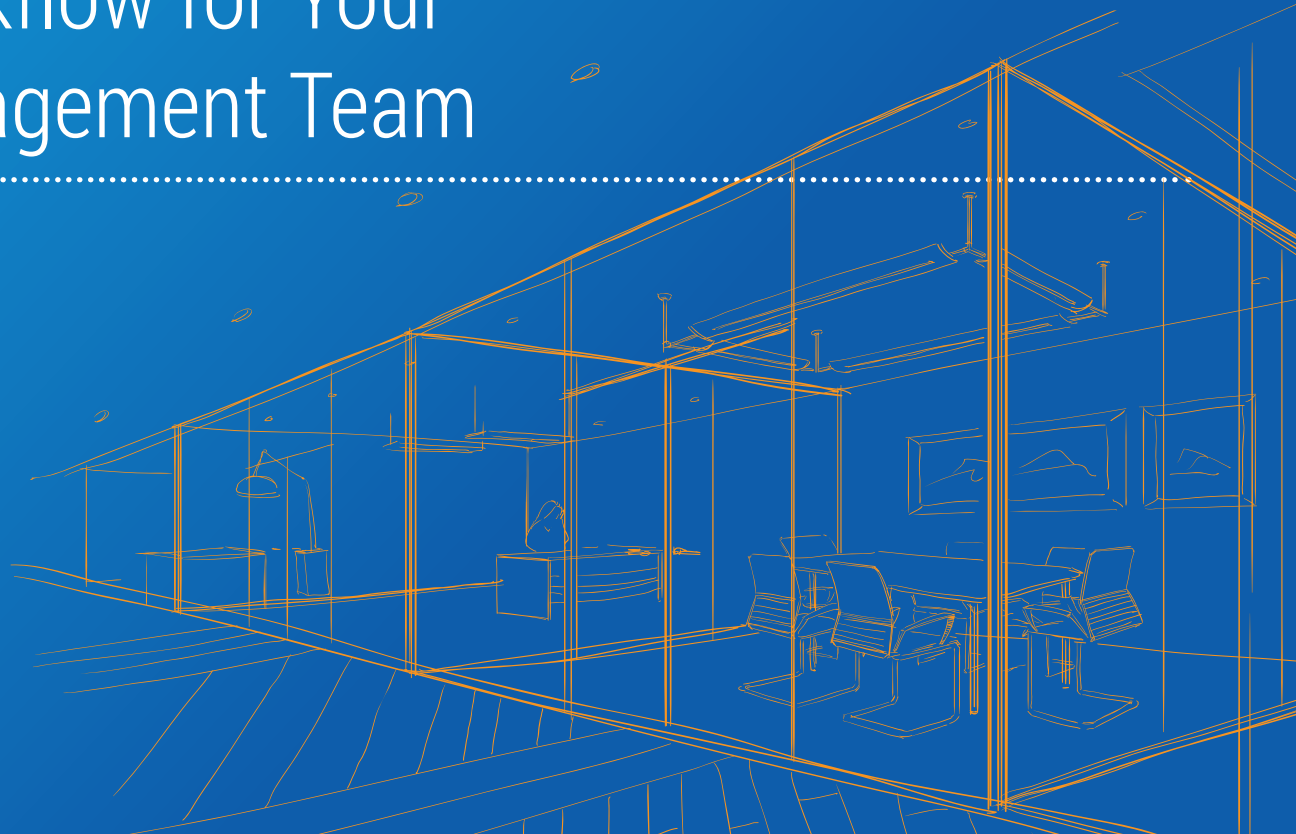




Improve Tenant Service with the Right Workflow for Your Property Management Team



Workflow (n.): the sequence of industrial, administrative, or other processes through which a piece of work passes from initiation to completion.

Learn how selecting the optimal service request workflow for your organization can dramatically improve the quality of the service you deliver, help you and your team operate more efficiently, and serve as the foundation of a service delivery program that retains and attract tenants.

WHY WORKFLOW MATTERS

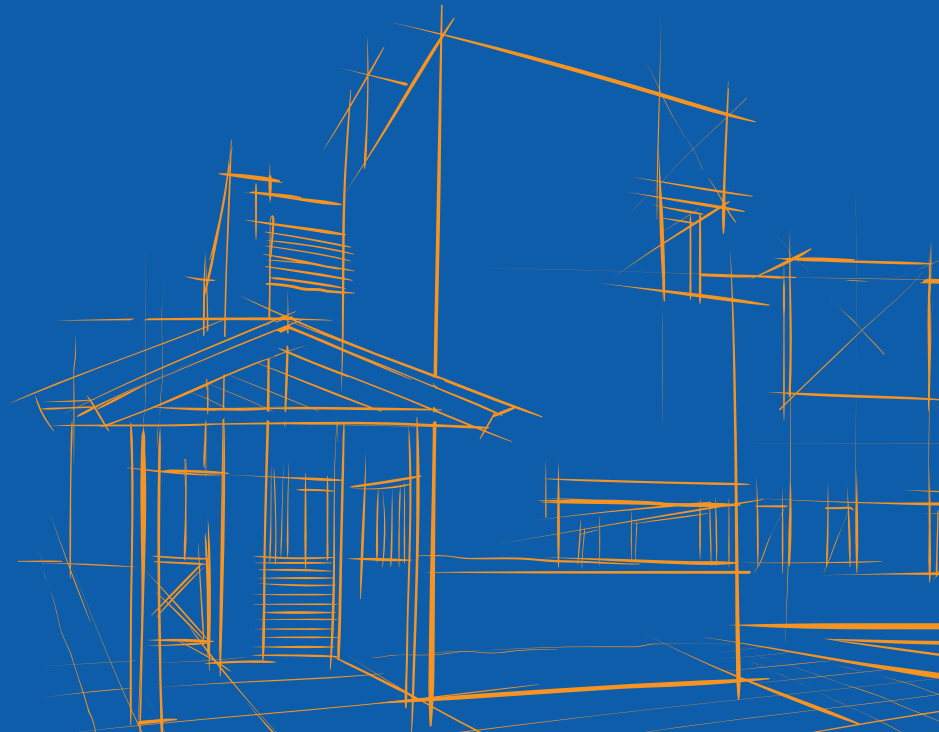
By themselves, workflows (or a lack thereof) won't really make or break your organization. But they are the easiest, most tactical thing you can implement in a relatively short timeframe to bring about big changes in the quality of your tenant service delivery and your team's efficiency.

Property management teams are increasingly asked by owners and investors to prove performance in all areas of their business with real-time data. The only way to do this is with clearly defined workflows in place and tools to help you collect data and generate reports that deliver results. Add the ability to measure and compare these results against performance benchmarks, and you're now equipped to transform your service delivery.

Those that adopt a data-driven approach to tenant service, with a clearly defined workflow process at its core, have clear visibility into service metrics. This insight helps to deliver consistent results they can prove, differentiates them competitively, and an identifiable operating brand in their markets.

Great service doesn't happen by accident.

“If you asked tenants to write down **three words that come to mind related to your service, what would they say?”**



THE STATUS QUO & WHAT GETS IN THE WAY

Helpful? On the ball? Trustworthy? Responsible?

If other adjectives come to mind first - that might mean you have some work to do in improving your tenant service workflows.

Most property management teams have had some type of tenant service request workflow process in place for years. Workflows range from loosely defined processes, to well-documented, written definitions. The most efficient organizations use technology to execute and manage the process.

The problem is, change is hard. And the old adage “if it ‘aint broke, don’t fix it” often represents the path of least resistance. As a result, most property management teams never scrutinize their workflow process for areas of improvement. And because there is very little operational standardization in commercial real estate portfolios, and even less so in properties managed by third parties, there often isn’t enough consideration given to the impact that process changes can make.

After more than 12 years of working with thousands of property teams, observing processes and studying the best practice providers in the CRE industry, we have noticed some common reasons firms are reluctant to address and implement tenant service request workflow changes.



1. People are resistant to change

It's Newton's first law: an object at rest, stays at rest. Change is hard! Additionally, there are often employees who are integral parts of an inefficient process and are concerned that if the process and their role changes, they may lose some of their internal value. Property owners and managers must shift the thought process here to refocus those people on the higher value activities they could undertake when freed from mundane tasks.

2. "We're too busy!"

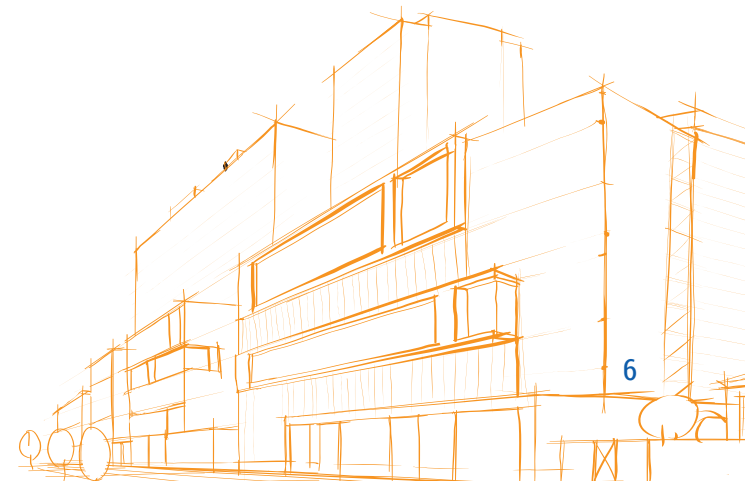
Change takes time, and given all the things that property management teams have to deal with on a daily basis, there has to be solid justification for devoting energy and effort to a project. We suggest that for many properties and firms, there may be no more important effort than improving the workflows of your tenant service requests. In addition to delivering improved service, firms that implement defined workflow processes often realize increased time savings for their teams. They also begin the important transition from reactionary to proactive management.



3. Management practices are decentralized

It is common, particularly for 3rd party management firms, to allow for operational autonomy at the property level. The problem in this approach, is that it prevents organizations from building a brand around their consistent service program. Without standard terminology, reporting, and benchmarks for performance comparison, it's nearly impossible to apply performance standards.

It is difficult to identify an example of a truly successful company that does not apply performance standards. Take Four Seasons Hotels – a name synonymous with service. Their reputation is no accident, but rather a direct result of established and enforced service standards. Every guest is greeted with the same line, every bed is made up the same way, and every pencil in the room is positioned in exactly the same way at every Four Seasons hotel in the world.



4. No one “owns it”

Every major process needs an owner, someone to ensure that steps are clearly defined, roles are explained, supporting tools are in place and results are reported on. We have seen this role successfully filled by tenant coordinators, administrators, project managers and chief engineers. An additional benefit is that “ownership” also helps address objection #1, resistance to change.

5. The tools are not in place to execute an optimal workflow

Incredible improvements are possible today with technology available through mobile tools (smartphones, tablets, etc.), improved networks, and property management systems. While service improvements can certainly be made without the use of those tools, it is difficult to realize optimal efficiency and performance without them and impossible to collect the data needed for true operational insight.

Summary



Change can be scary. Not changing can be even scarier. In order to attract and retain tenants in the fiercely competitive CRE market, property owners and managers need to stay relevant and continuously improve their operations. They need to take a hard look at a critical part of their responsibility - tenant service request workflow (the lifeblood of responsiveness). Performance improvement starts with critical self-analysis.

Evaluating if you have a **workflow problem**

Use the checklist on
the next page and score
yourself or company:



Evaluation Questions

True False N/A

We have a written (or diagramed) tenant service request workflow process. (Bonus if you have these processes for each different property type in your portfolio)			
All our property teams use the same processes and terminology			
We have evaluated and updated these processes within the last 3 years			
We have created benchmarks of performance for both service delivery and tenant satisfaction with service.			
We have shared and communicated our standards with our tenants			
We can measure performance at each stage of the service request lifecycle			
We have real-time visibility and data into performance against those benchmarks			
We regularly review and evaluate our tenant service delivery results			
We use mobile technology to optimize our service delivery program			
If an owner or executive asked us today for up-to-date data to validate the efficacy of our tenant service delivery program, we could deliver it			

Scoring:

Add up the total number of “True” answers and use the guide below to learn whether you should undertake a workflow evaluation and update project.

Score: What it Means:

2 or less	Uh oh! – Make this an immediate priority. Regardless of the size of your property or portfolio, this is a property management fundamental that needs fixing.
3 to 5	Needs Improvement. Although you’re not where you need to be just yet, you probably have an idea of the problem areas. Assign a project lead and finish off the last mile!
6 to 7	Pretty good. There is a little work yet to do here, but you’re well on your way to delivering outstanding tenant service.
8 or higher	Congratulations! You are process rock stars and likely have a tenant service delivery program that helps keep your tenants very happy, your team operating at peak efficiency and differentiate your company from most competitors in your markets.

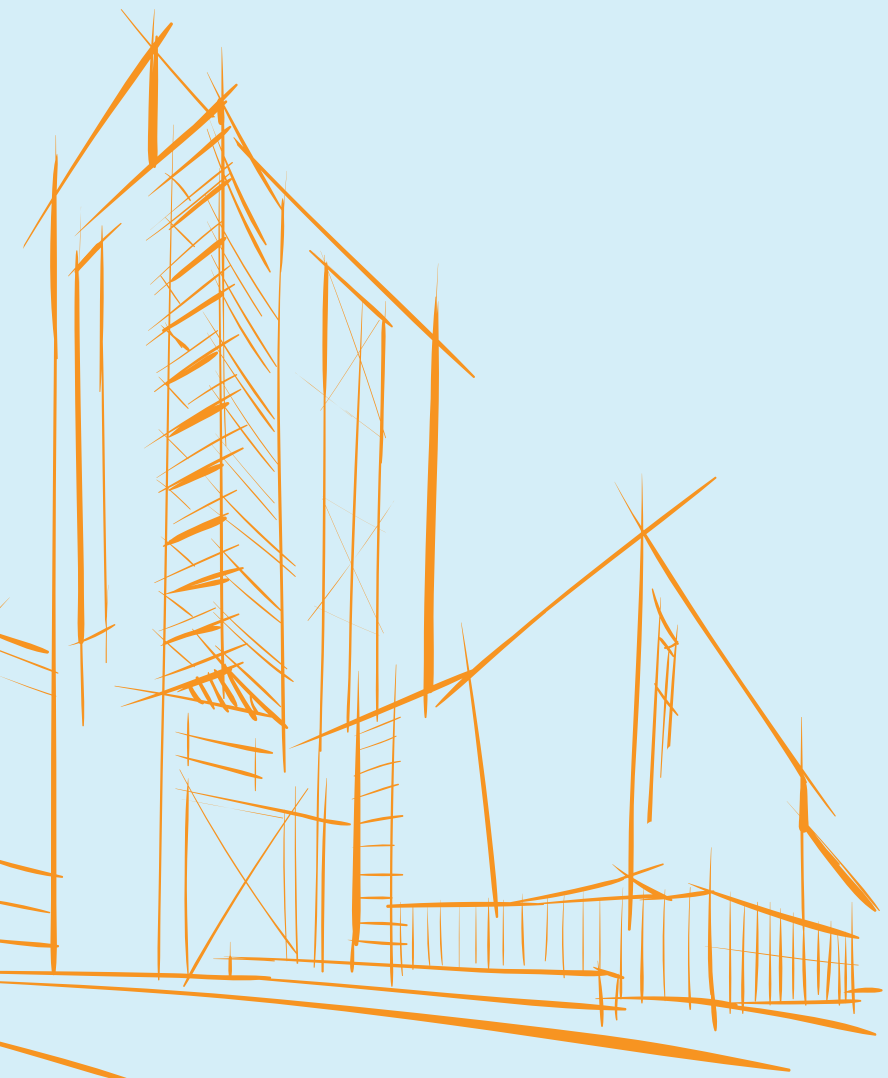
Where to Begin

Start with Some Goals

As with most projects, it helps to begin by identifying several specific objectives. The more specific the better. In addition to answering “True” to all of the high-level evaluation questions detailed above, here are some other goals we have seen clients identify:



- ▶ **Improve our end of year survey results on tenant satisfaction by X%**
- ▶ **Obtain 10 new client testimonials for service satisfaction this year.**
- ▶ **Increase tenant submission of service requests online by X%**
- ▶ **Reduce the number of current steps in our process by X%**
- ▶ **Increase staff productivity (how many service requests we complete/day) by X%**
- ▶ **Reduce service call-backs by X%**
- ▶ **Reduce service requests requiring outside contractors by X%**
- ▶ **Increase service request revenue capture by X\$**



Create a Team

It doesn't have to be a large team, but someone must have ownership of this project. Then identify and assemble some key stakeholders. Typically, the people involved in this project might include:

- ▶ **Tenant Coordinator/Administrator or Assistant PM**
- ▶ **Someone from engineering/maintenance**
- ▶ **If outsourcing maintenance, your account manager**
- ▶ **An accounting representative
(for the billable component of service request management)**
- ▶ **A tenant representative
(tremendous good will is created when you include your tenants)**

Write it Down

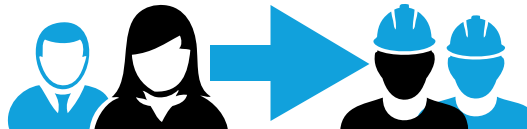
1. Even if you don't currently have a written process, write down the steps you think you and your teams go through to complete a tenant service request through its complete lifecycle, from submission to billing or closure. Remember to account for variables like "request is submitted by stopping maintenance personnel in hallway to ask for service." If you have standards, detail those as well.
2. Detail an optimal workflow, based on cutting as many steps as possible out of that process. Some of this may be contingent upon finding new tools that can help you achieve this, but that will be part of the overall process. Whatever you do, strive to make improvements! A critical mistake we see companies make, particularly when evaluating systems to help with this process, is that they simply try to replicate what they are doing now. Remember, the goal is to improve the process.



Sample of an Existing Process



1. Tenant initiates service request



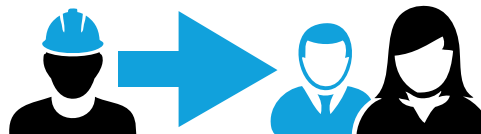
2. Property Management team assigns service request to Engineering team



3. Engineering team member receives notification on their smartphone, acknowledges receipt of request, and accepts the assignment



4. Engineering team member visits Tenant and completes the request



5. Engineering team member documents time worked and materials used, then closes the service request (unless labor or materials are billable to the Tenant, then the request must be closed by the Property Management team)

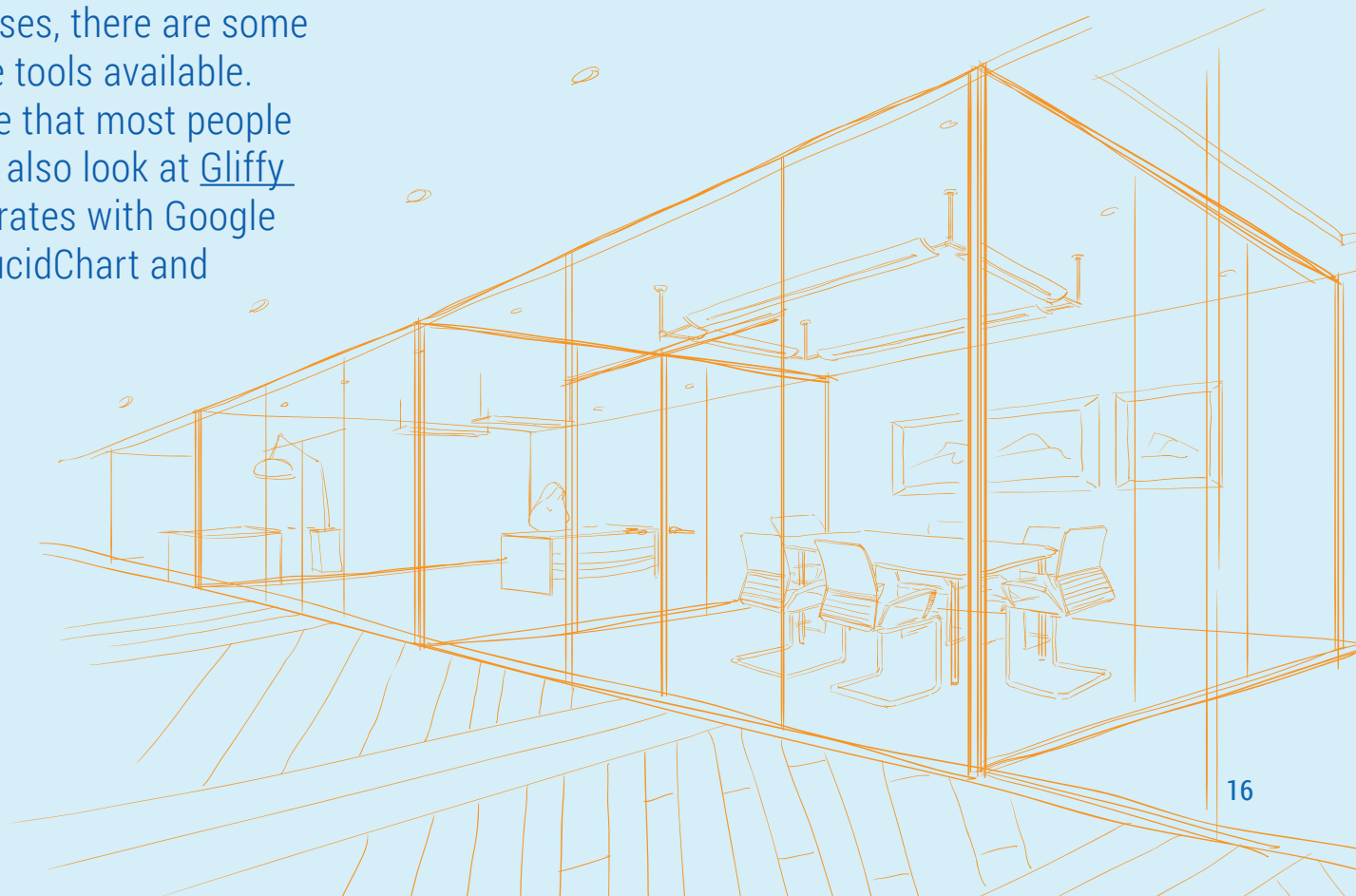


6. Tenant receives notification that the work is complete and is asked to rate their satisfaction of the service

Drawing Tools

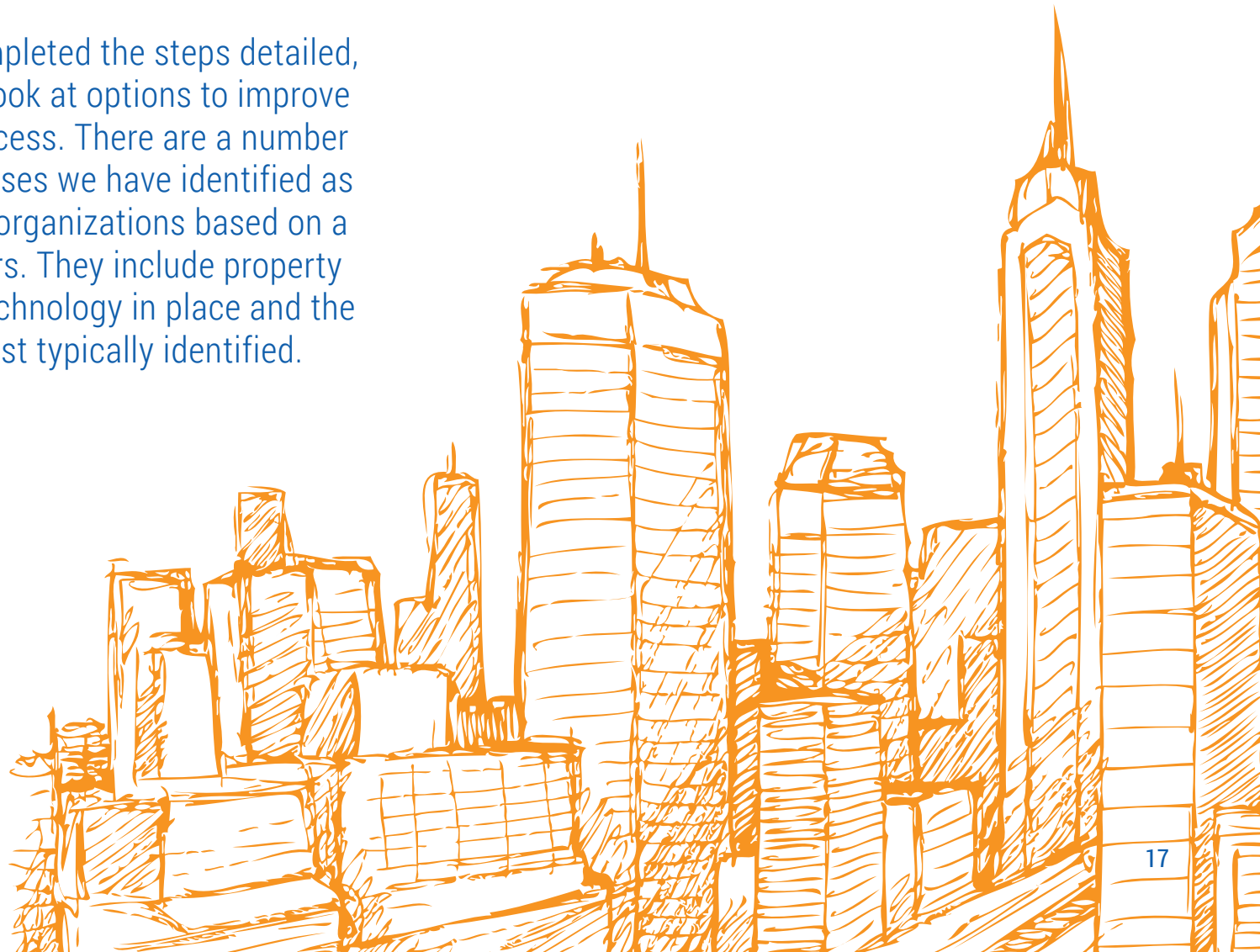
For visual people, or those who might have some more complex processes that require decision trees and prefer to diagram their processes, there are some relatively easy-to-use tools available.

[Microsoft Visio](#) is one that most people are familiar with, but also look at [Gliffy Diagram](#) which integrates with Google Chrome as well as LucidChart and SmartDraw.



Identifying Your Optimal Workflow

Once you've completed the steps detailed, you're ready to look at options to improve your current process. There are a number of typical processes we have identified as possible fits for organizations based on a number of factors. They include property type, staffing, technology in place and the goals we see most typically identified.



Common Workflow Options

1. Desk Quarterback

In this setup, management team personnel is responsible for collecting service request details from each tenant and managing distribution (assignment) and communications for the lifecycle of the request. May be an all-manual process or include some technology elements.

2. Chief Engineer Quarterback

This is similar to the process above with the primary difference being that the initial or secondary communication step (whether from the tenant requestor or tenant coordinator) is delivered to the chief engineer in a property. The engineer then assigns the task to a member of his team who is responsible for completing the task.

3. Direct Assignment / Required Process Step Confirmation

In this workflow, a service request is submitted online or via a mobile device by the tenant requestor and the pertinent information is 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 in place including an advanced online work order system extended to a connected mobile application accessible on a smartphone or tablet and is the optimal solution for service and efficiency for the right types of properties, tenants and organizations.

Common Workflow Options (continued)

4. Mixed / Blend

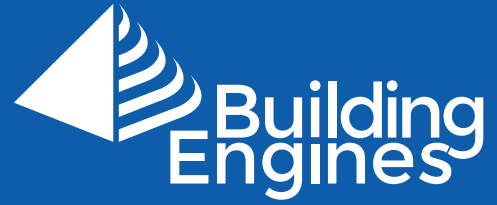
A combination of one of the Quarterback methods together with the Direct Assignment processes. This is utilized in situations where some issue types can be directly assigned, while some others may need further evaluation based on specific skill sets required or, potential associated costs. Again, there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

5. “Hot Potato”

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 “Takes” it and the other people in the pool are notified. Once again, this process requires the right technologies in place in order to work.

SUMMARY

Tenant Satisfaction is a critical concern for CRE property owners and managers. For help identifying the ideal workflow for your tenants and team, get in touch with the experts from Building Engines. **CLICK HERE** to request a meeting.



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