Operations Performance Management User Guide

Managing service delivery and measuring tenant satisfaction

Table of Contents

Operations Performance Management 3
Viewing Dashboard Metrics *3*
Configuring your Building Hours *3*
Configuring Service Levels, Delivery Targets, and Escalations *4*
Configuring Managed Issues Types *5*
Configuring Point People *7*
Activating Tenant Satisfaction *7*
Accessing and Running OPM Reports *9*
Saving and Scheduling OPM Reports *10*

Operations Performance Management

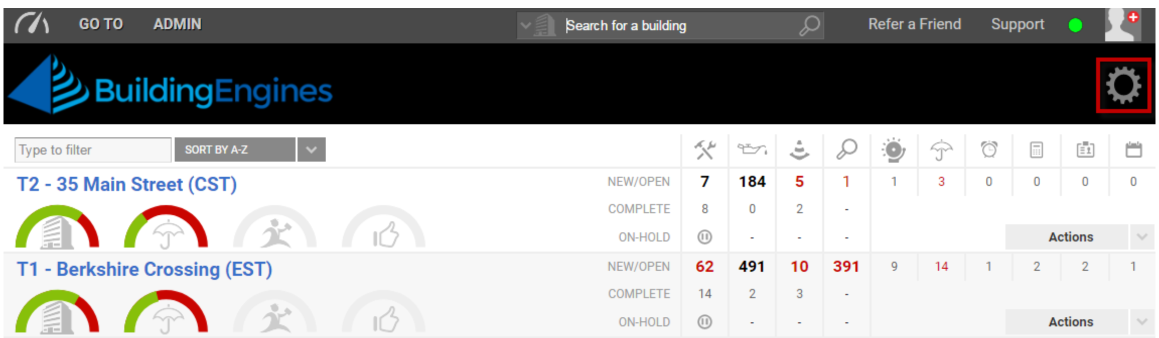
Paired with the Work Order module, the Operations Performance Management (OPM) module allows you to define service level targets, setup protocols for service level violations, and monitor overall tenant satisfaction. In short, the OPM module helps the property management team provide tenants with a consistent and positive experience throughout the lifecycle of a work order.

Viewing Dashboard Metrics

Total Service Delivery (TSD) and Tenant Satisfaction (TS) trends can be easily monitored from the homepage dashboard. The TSD gauge summarizes all of the work order activity for a specific time period, based on your preferred service targets, while the TS gauge displays tenant satisfaction levels. This section describes the process of configuring the Total Service Delivery (TSD) and Tenant Satisfaction (TS) homepage graphs.

To enable the TSD and TS graphs located on the homepage:

1. Click the gear icon on the home screen dashboard.



2. In **Settings**, click **Display Total Service Delivery** and **Display Tenant Satisfaction**.

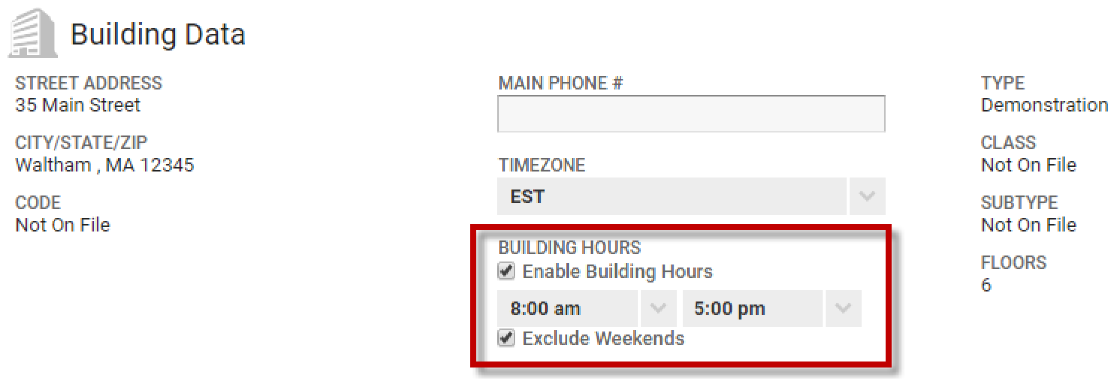
Configuring your Building Hours

The first step in rolling out the Operations Performance Management (OPM) module is to establish your building's working hours. Defining a building's working hours signals the OPM module to pause the service level clock outside of the defined working hours. For example, if your building's hours of operation are between 8AM-5PM, and a work order is created at 7PM, the clock will not begin until 8AM the following morning.

This section describes the process of configuring your building hours.

To configure your building hours:

1. Click **Go To > Building List**.
2. Select a **BUILDING**.
3. Navigate to the **Building Data** section and click **Enable Building Hours**.



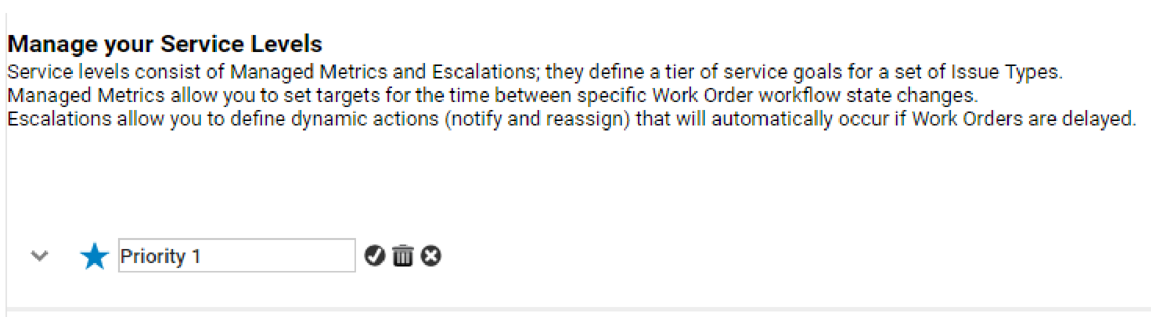
4. Enter your **BUILDING HOURS** and click the **SAVE** located at the bottom of the page.

Configuring Service Levels, Delivery Targets, and Escalations

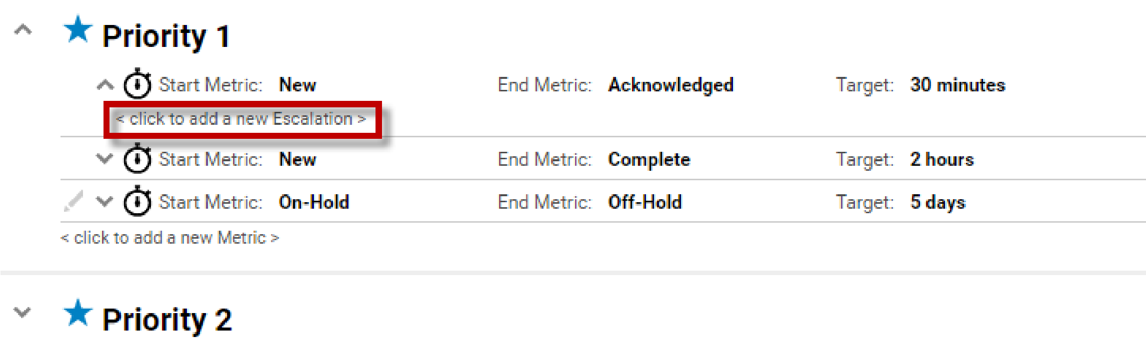
Service Levels defined through the Operations Performance Management module consist of metrics. A metric is any change in workflow state for a work order. Each metric includes a defined target time and escalation if that target is not achieved. Escalations can include notifying a recipient and/or automatically reassigning the work order to another user. This section describes the process of configuring your service levels, delivery targets, and escalations.

To configure your Service Level metrics:

1. Click **ADMIN > Performance Management > OPM Configuration**.
2. Click the **CONFIGURATION** tab.
3. Enter a **Service Level** name and click the adjacent to save.



4. Click the down arrow located to the left of the service level to expose the metrics fields.
5. Click **< click to add a new Metric >**.
6. Enter a **Start Metric**, **End Metric**, and **Target** in days, hours, or minutes.
7. Click the corresponding to save.
8. Click the down arrow located next to **Start Metric**.
9. Click **< click to add a new Escalation >**.



10. Select the **Action**, **Lag Time**, and **Recipients**.
    a. **Action** – Defines whether an email or reassignment occurs when the work order violates a service level metric.
    b. **Lag Time** – The amount of time between the start of the metric and when the escalation is triggered.
    c. **Recipients** – The Point Person is the role (and corresponding employee or vendor user) who is notified and/or reassigned to the work order following a service level violation. Staff assignment to Point People roles is accomplished on the **Point People** tab. See the Configuring Point People section for further direction.
11. Click the corresponding to save.
12. Repeat steps 3-11 until all Metrics and Escalations have been configured.
13. Once the Service Levels have been configured, click MANAGED ISSUE TYPES at the bottom of the page.

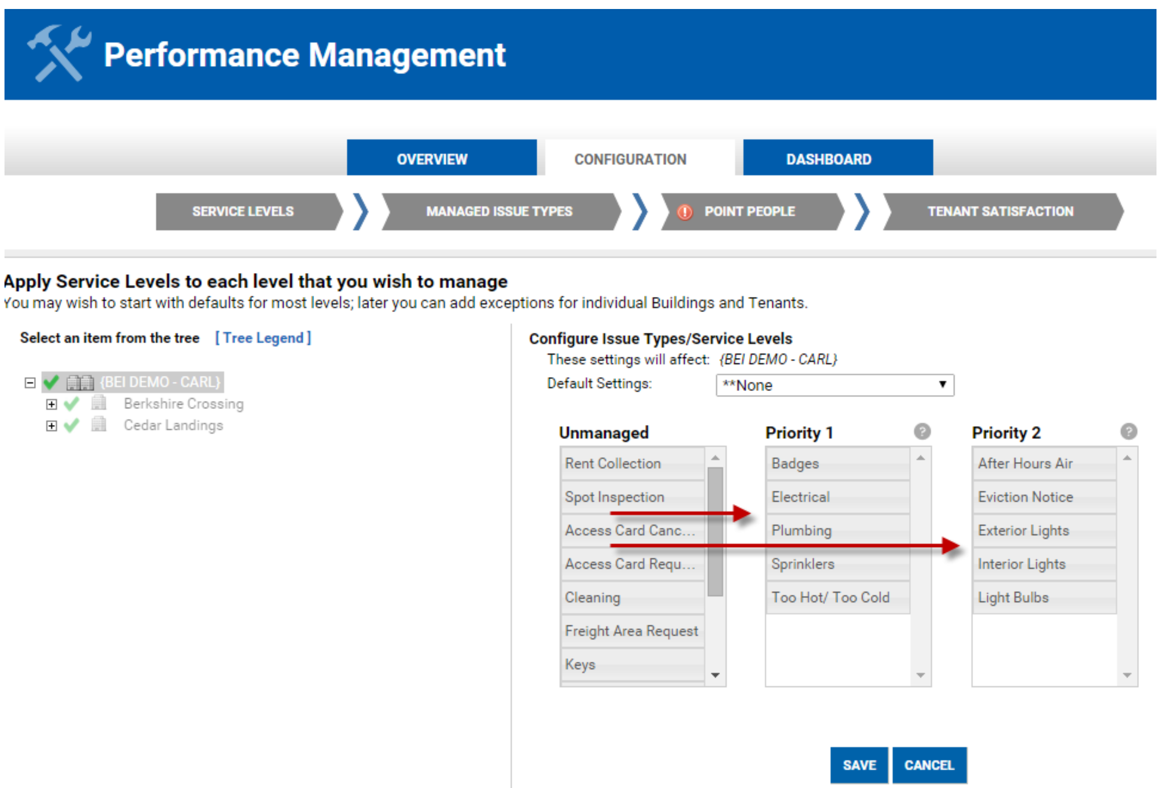
Configuring Managed Issues Types

After your service levels and escalations have been configured, you need to associate your issue types to the appropriate service level. Issue types and their associated service levels can be managed portfolio-wide, regionally, by building, or by tenant. This section describes the process of associating your issue types to the appropriate service level.

To associate an issue type to a service level:

1. Click **ADMIN > Performance Management > OPM Configuration**.
2. Click the MANAGED ISSUE TYPES tab.
3. Using the region/building tree on the left side of the page, select the **[+]** to expand the portfolio, region, building, or tenant.

   Note: For additional direction on the tree setup, click [**Tree Legend**].
4. Select a portfolio, region, building, or tenant to configure.
5. Drag and drop the issue types in the **Unmanaged** box into the appropriate service level box.



6. Once you finish moving the issue types into the appropriate Service Level, click **SAVE**.

   Note: Issue types are NOT required to be associated to a Service Level.

Configuring Point People

Point People refers to members of the property management staff (employees and vendors) that are notified when a work order requires additional attention or intervention. If a work order violates a service level metric, the Point Person is either notified or reassigned the task.

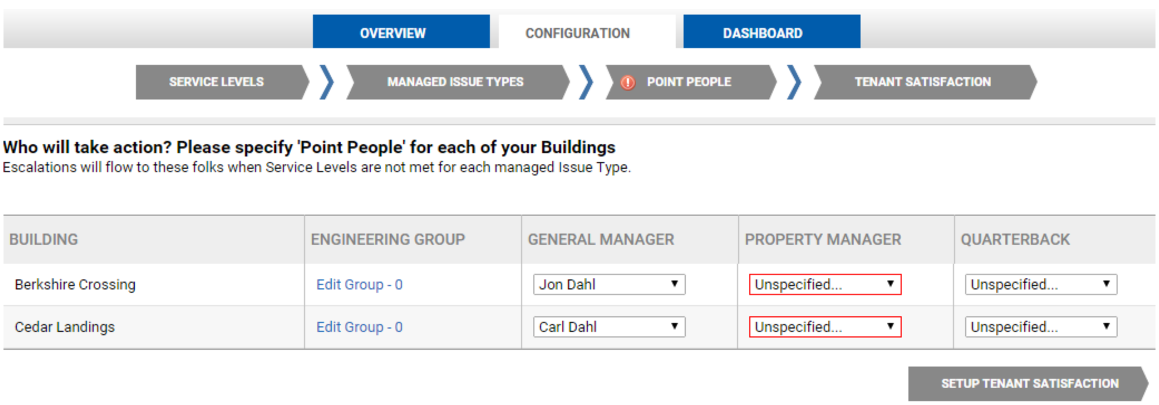
The following roles are provided for each building:

- **Engineering Group**
- **General Manager**
- **Property Manager**
- **Quarterback**

This section describes the process of configuring your point people.

To assign a user to a Point Person role:

1. Click **ADMIN > Performance Management > OPM Configuration**.
2. Click the POINT PEOPLE tab.
3. Select a user to assign to each Point Person role.



4. When finished, click SETUP TENANT SATISFACTION to save and begin the Tenant Satisfaction configuration.

Activating Tenant Satisfaction

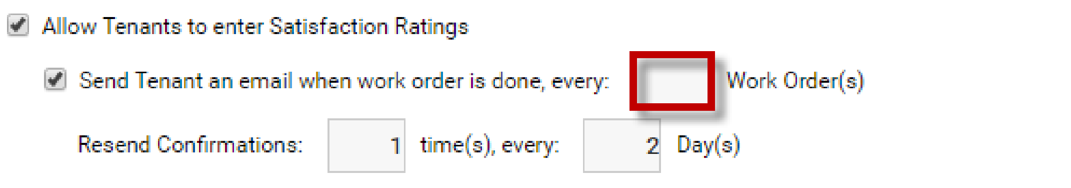
The Tenant Satisfaction portion of OPM enables you to capture tenant satisfaction levels following the completion of a work order. If work performed fails to meet a tenant's expectations, the application sends out an escalation notification, reopens the work order, marks it as critical, and if desired, reassigns it to a designated user. Similar to the Managed Issue Types configuration, Tenant Satisfaction can be managed portfolio-wide, regionally, for individual buildings, or for specific tenants.

Tenants can provide a satisfaction rating by clicking one of the icons located within the work order. If a tenant fails to provide a satisfaction rating from the work order, an automatic follow-up email can be sent.

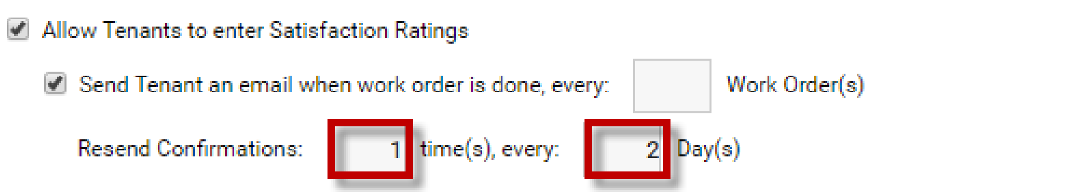
This sections describes the process of setting up the Tenant Satisfaction portion of Operations Performance Management (OPM).

To enable Tenant Satisfaction:

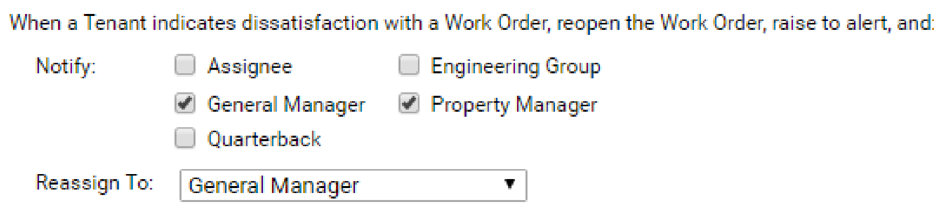
1. Click **ADMIN > Performance Management > OPM Configuration**.
2. Click the TENANT SATISFACTION tab.
3. (Optional) To allow tenants to view the time each status change should occur (I.E. New → Arrived), click **Allow Tenants to see SLA Targets**.
4. Click **Allow Tenants to enter Satisfaction Ratings**.
5. If a tenant does not rate their experience from the Tenant Portal, a follow up email can be automatically sent allowing them to rate their experience with one click. To enable the follow up email, click **Send Tenant an email when work order is done**.
6. (Optional) If you do not want a follow up email to accompany every missed tenant satisfaction rating from the Tenant Portal, enter your preferred frequency in the __ **Work Order** field.



If a tenant fails to respond to the initial follow up satisfaction email, additional follow up emails can be sent at your preferred frequency. Use the following fields to specify the maximum number of follow up satisfaction emails, along with their frequency.



7. (Optional) If a tenant provides a dissatisfied rating, a Point Person(s) can be notified and reassigned the work order. Use the supplied fields to indicate your notification and reassignment preferences.



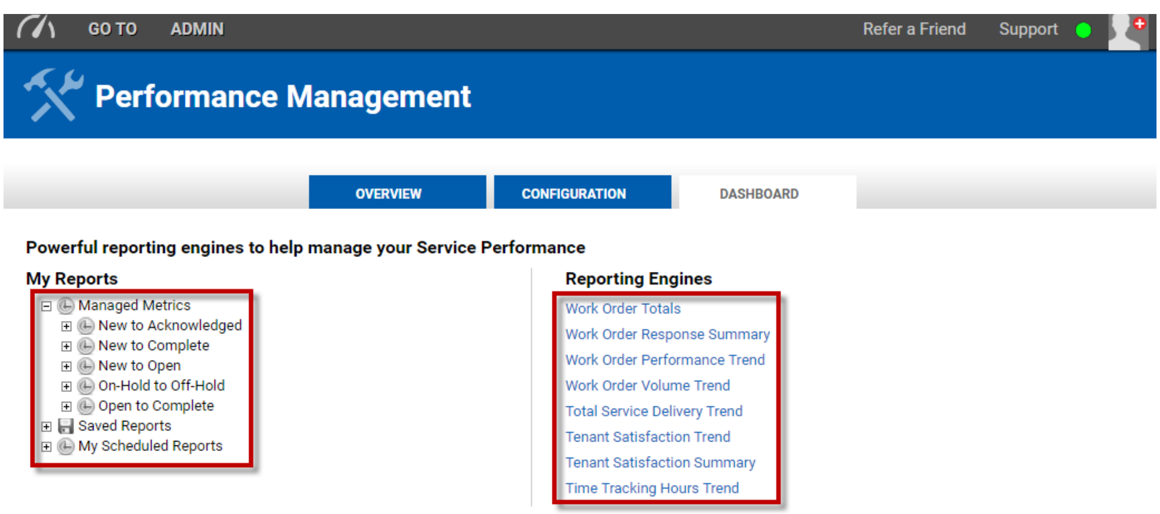
8. Click SAVE.
9. Click SAVE CONFIGURATION to save all of your configurations for the Operations Performance Management module.

Accessing and Running OPM Reports

The Operations Performance Management (OPM) module features powerful reporting that provides insight into response times, work order volume, trends, and tenant satisfaction. This section describes how to access and run reports specific to OPM.

To access and run OPM reporting:

1. Click **ADMIN > Performance Management > OPM Dashboard**.
2. Click the DASHBOARD tab.
3. Select a report from either **My Reports** or **Reporting Engines**.
    a. If running a report from **My Reports**, click the **[+]** to expand a category, and select a report.
    b. If running a report from **Reporting Engines**, select a report.



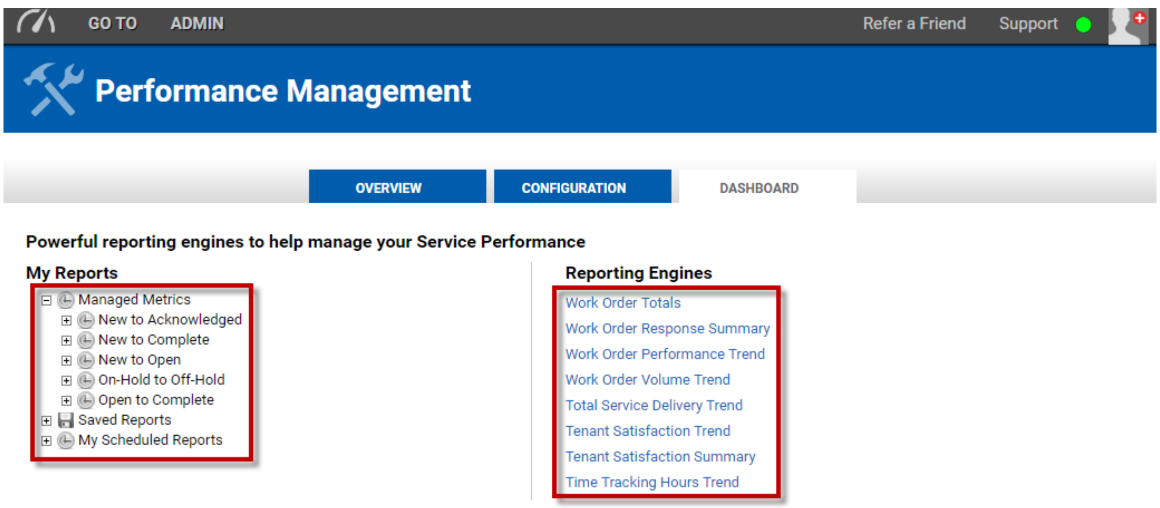
4. Use the provided fields to enter your search criteria and click SHOW RESULTS.

Saving and Scheduling OPM Reports

If you run the same OPM report(s) with any regularity, consider saving the report and then scheduling it to run at a set frequency. This section describes how to save and schedule the delivery of your OPM reports.

To save and schedule a report in the OPM module:

1. Click **Admin > Performance Management > OPM Dashboard**.
2. Click DASHBOARD tab.
3. Select a report from either **My Reports** or **Reporting Engines**.
   a. If running a report from **My Reports**, click the **[+]** to expand a category, and select a report.
   b. If running a report from **Reporting Engines**, select a report.



4. Use the provided fields to enter your search criteria and click SHOW RESULTS.
5. After the report has returned its results, click the floppy disk icon.
6. Enter a report **Name** and check the **Schedule Delivery** box.
7. Select a frequency (**How often**), **Delivery Format**, initial start date (**Starting When**), and **Date Range**.
8. Click **Save** to finish saving and scheduling the OPM report.