



Operations Performance Management User Guide



Managing service delivery and measuring tenant satisfaction

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Operations Performance Management

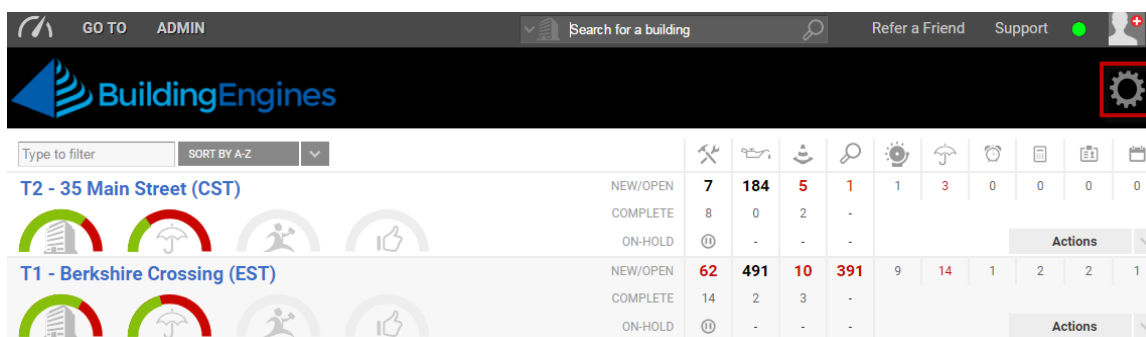
Paired with the Work Order module, the Operations Performance Management (OPM) module allows you to define service level targets, setup protocols for service level violations, and monitor overall tenant satisfaction. In short, the OPM module helps the property management team provide tenants with a consistent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

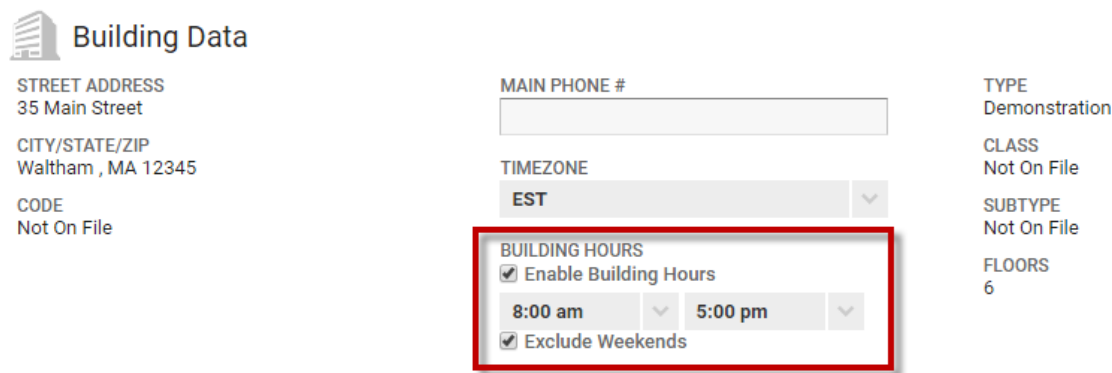
Configuring your Building Hours

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**.



Building Data

STREET ADDRESS
35 Main Street

CITY/STATE/ZIP
Waltham , MA 12345

CODE
Not On File

MAIN PHONE #

TIMEZONE
EST

TYPE
Demonstration

CLASS
Not On File

SUBTYPE
Not On File

FLOORS
6

BUILDING HOURS

☒ Enable Building Hours

8:00 am 5:00 pm


☒ Exclude Weekends

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.

Manage your Service Levels

Service levels consist of Managed Metrics and Escalations; they define a tier of service goals for a set of Issue Types. Managed Metrics allow you to set targets for the time between specific Work Order workflow state changes. Escalations allow you to define dynamic actions (notify and reassign) that will automatically occur if Work Orders are delayed.



▼ ★ Priority 1   

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 >**.

^ ★ **Priority 1**

^ ⌚ Start Metric: New	End Metric: Acknowledged	Target: 30 minutes
< click to add a new Escalation >		
∨ ⌚ Start Metric: New	End Metric: Complete	Target: 2 hours
✓ ∨ ⌚ Start Metric: On-Hold	End Metric: Off-Hold	Target: 5 days
< click to add a new Metric >		

∨ ★ **Priority 2**

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  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.

Performance Management

OVERVIEW CONFIGURATION DASHBOARD

SERVICE LEVELS > MANAGED ISSUE TYPES > POINT PEOPLE > TENANT SATISFACTION

Apply Service Levels to each level that you wish to manage
You may wish to start with defaults for most levels; later you can add exceptions for individual Buildings and Tenants.

Select an item from the tree [\[Tree Legend\]](#)

- BEI DEMO - CARL
 - Berkshire Crossing
 - Cedar Landings

Configure Issue Types/Service Levels
These settings will affect: (BEI DEMO - CARL)
Default Settings: **None

Unmanaged	Priority 1	Priority 2
Rent Collection	Badges	After Hours Air
Spot Inspection	Electrical	Eviction Notice
Access Card Canc...	Plumbing	Exterior Lights
Access Card Requ...	Sprinklers	Interior Lights
Cleaning	Too Hot/ Too Cold	Light Bulbs
Freight Area Request		
Keys		

SAVE CANCEL

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.

BUILDING	ENGINEERING GROUP	GENERAL MANAGER	PROPERTY MANAGER	QUARTERBACK
Berkshire Crossing	Edit Group - 0	Jon Dahl	Unspecified...	Unspecified...
Cedar Landings	Edit Group - 0	Carl Dahl	Unspecified...	Unspecified...

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 section 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  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.

☒ Allow Tenants to enter Satisfaction Ratings

☒ Send Tenant an email when work order is done, every: Work Order(s)

Resend Confirmations: 1 time(s), every: 2 Day(s)

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.

☒ Allow Tenants to enter Satisfaction Ratings

☒ Send Tenant an email when work order is done, every: Work Order(s)



Resend Confirmations: 1 time(s), every: 2 Day(s)

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.

When a Tenant indicates dissatisfaction with a Work Order, reopen the Work Order, raise to alert, and:

Notify: ☐ Assignee ☐ Engineering Group
☒ General Manager ☒ Property Manager
☐ Quarterback


Reassign To:

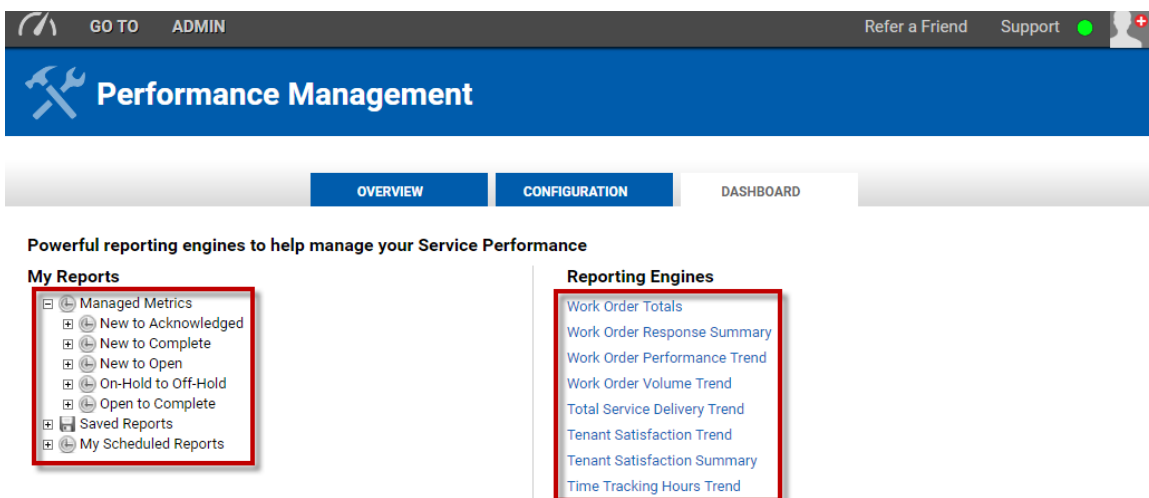
8. Click .
9. Click  to save all of your configurations for the Operations Performance Management module.


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  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.



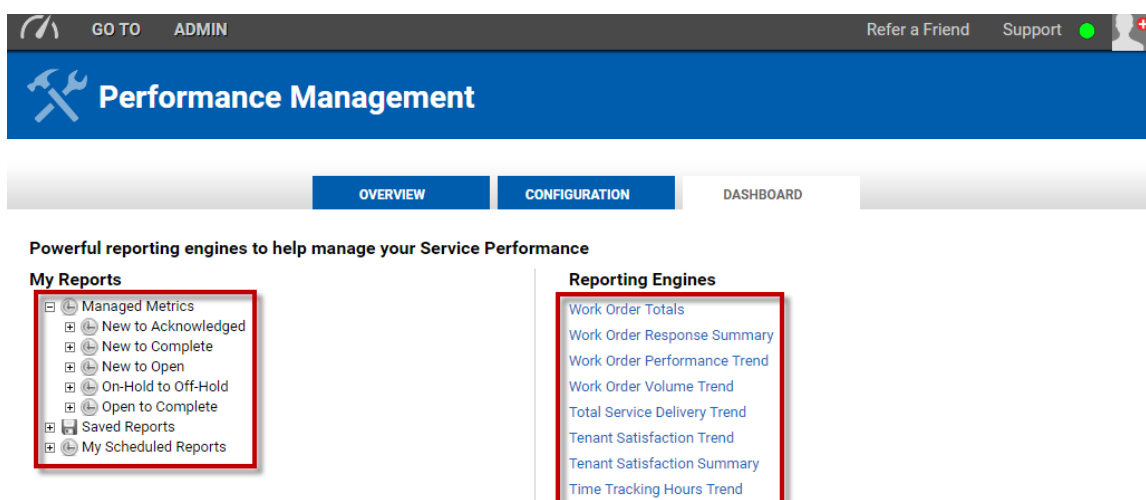
4. Use the provided fields to enter your search criteria and click .


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.