Brightly

Future-proof your reporting

10+ reports you need to make better decisions and take action

Table of Contents

Introduction

Be prepared for anything with some simple keys to asset management with better reporting tools

When you come in to work, you may not know what the day holds. What kind of projects will be thrown your way? How will your team perform? Will your equipment and assets hold up?

While you're not expected to predict the future per se, it's crucial that you know how to track and report on what you've done and what you're doing. Feel empowered to justify staffing, resource needs, asset fixes and more with the key insights in these reports.
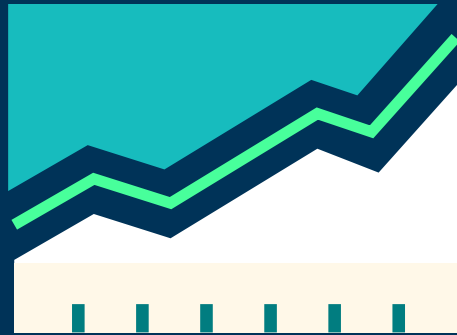
Chapter 1
Showing efficiency

Your boss calls you into their office and asks what your department has been doing for the past few months. They are creating the yearly budget and need a report to show your team's performance. They'll need a list of work orders submitted and completed, as well as the average time you spend on projects month to month.

Can you prove your efficiency?

Whether you just want to show your day-to-day work or you need to demonstrate your efficiency to upper management, you should have tools in place to be able to quickly and easily represent yourself and your team.

Consider using a system that:

- Monitors your work orders
- Automates your maintenance workflow
- Presents information through organized reports and charts

28.3%

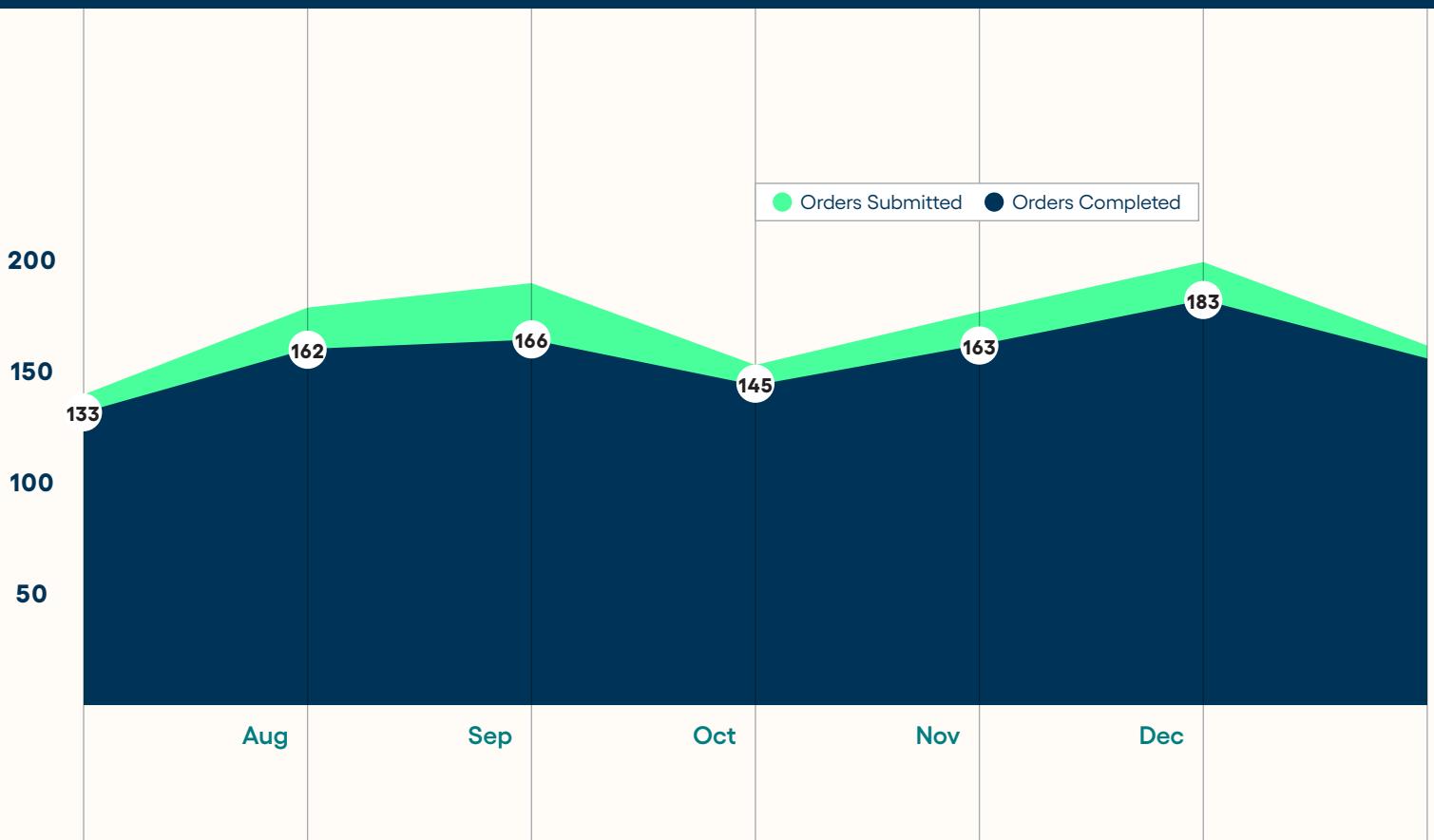Increase in productivity for organizations that are currently using a CMMS[1]

> KEY STAT

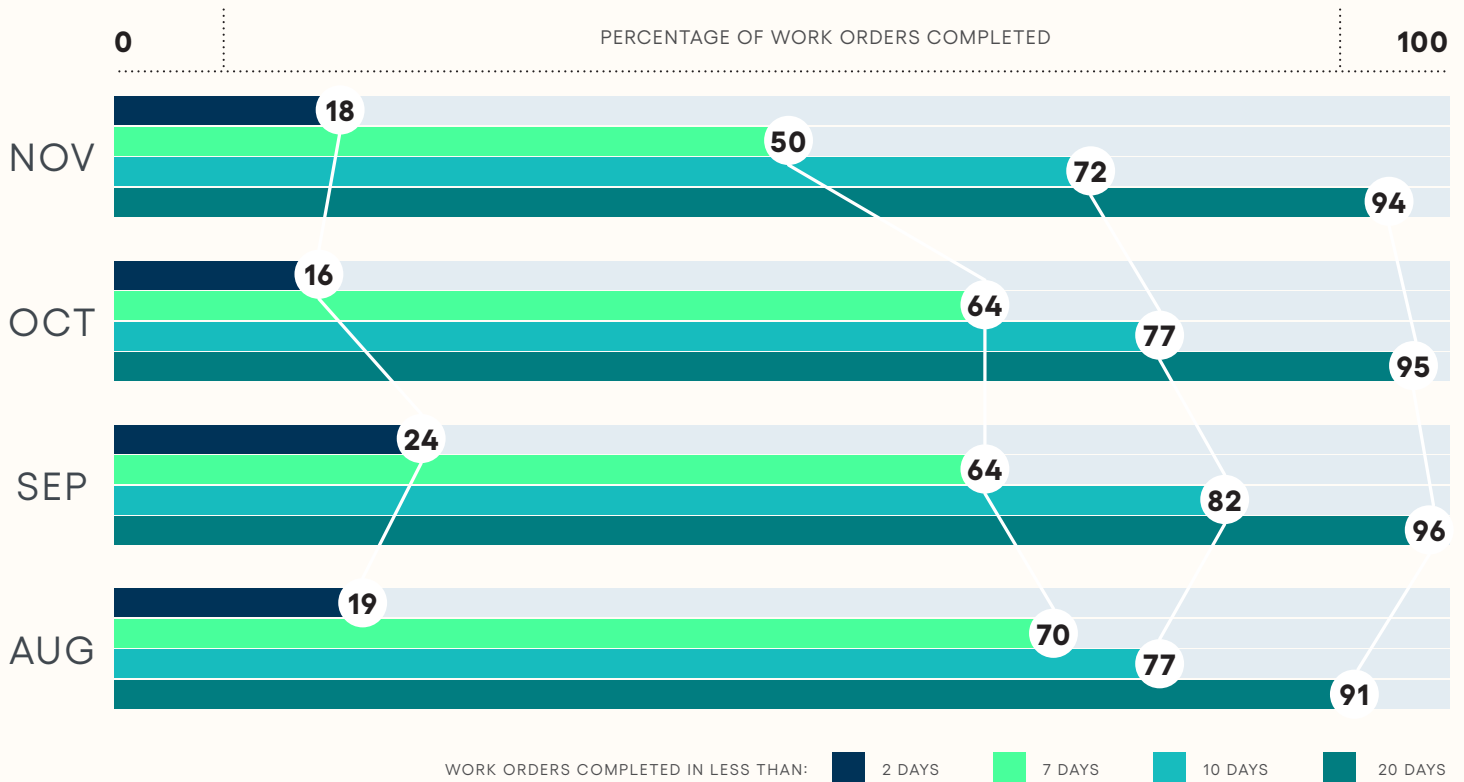# Efficiency Report

> **WHAT IT SHOWS**

Number of work orders submitted right next to work orders completed.

> **WHY IT MATTERS**

You can gauge your daily, weekly and monthly productivity and work toward improving your processes.

Legend: ● Orders Submitted ● Orders Completed

	Aug	Sep	Oct	Nov	Dec
Orders Completed	133 (Jul) 162	166	145	163	183

PERCENTAGE OF WORK ORDERS COMPLETED

0   100

NOV — 18, 50, 72, 94

OCT — 16, 64, 77, 95

SEP — 24, 64, 82, 96

AUG — 19, 70, 77, 91

WORK ORDERS COMPLETED IN LESS THAN: ■ 2 DAYS   ■ 7 DAYS   ■ 10 DAYS   ■ 20 DAYS

> KEY STAT

Productivity Report

Percentage completed in days
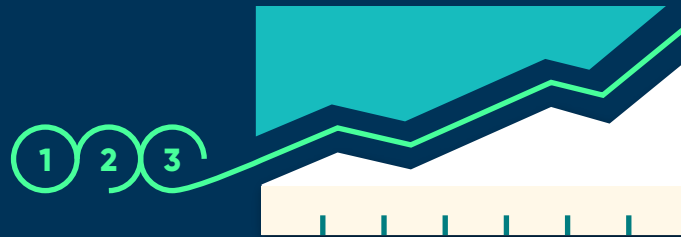
> WHAT IT SHOWS

How many work orders are completed in how many days.

> WHY IT MATTERS

Prove how fast you're getting work done or make a case for improving your efficiency with additions to your team.

"My staff is now more efficient because they can close work orders from their phones while in the field."

Scott Travis, Adams State University

Chapter 2
Justify the budget

Your team is completing work on time, but more last-minute tasks just keep piling in. You're thinking that you need to increase your budget so you can finally replace that piece of equipment that has been hanging by a thread and maybe hire someone new, but you'll need hard numbers and statistics to convince your boss.

Can you justify your budget?

Whether you're under the gun about your departmental budget or you see a need for hiring additional staff, you'll have to justify your decisions with some strong data. Operational budgets are one of the first to get slashed, so you'll need to bring your strongest ammunition to the fight.

Find a system with reporting tools to help you show:

- Where your budget is going

- How much you spend per work order

- Long-term budget needs

20.1%

reduction in equipment downtime for organizations that are currently using a CMMS[1]

> KEY STAT

Cost Per Report

Work order + square foot + craft

> **WHAT IT SHOWS**

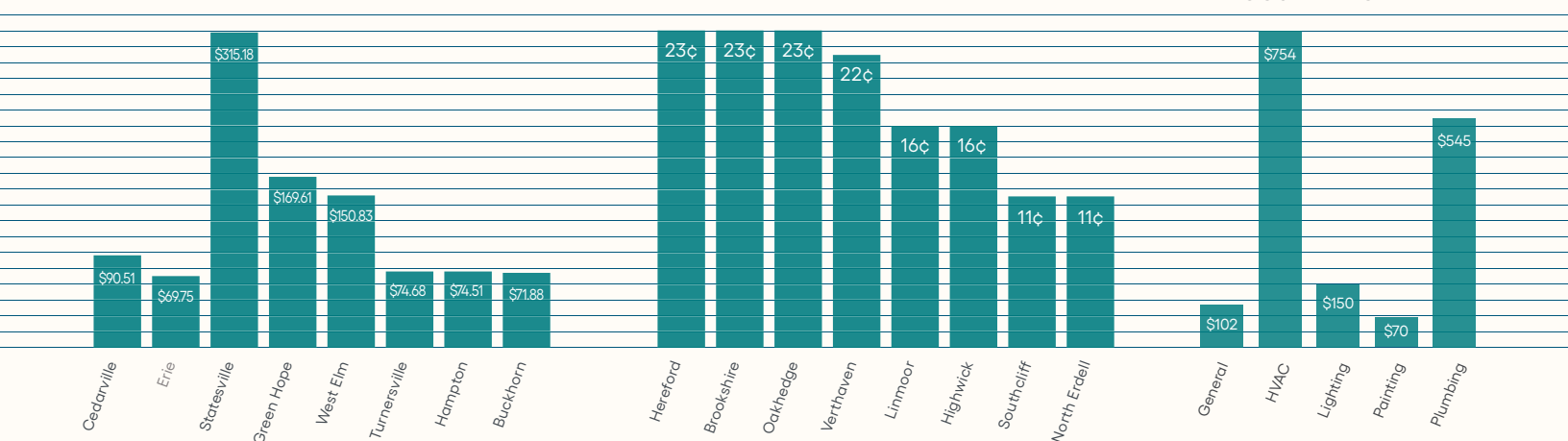Compare your cost per work order, per square foot and per craft throughout your facilities.
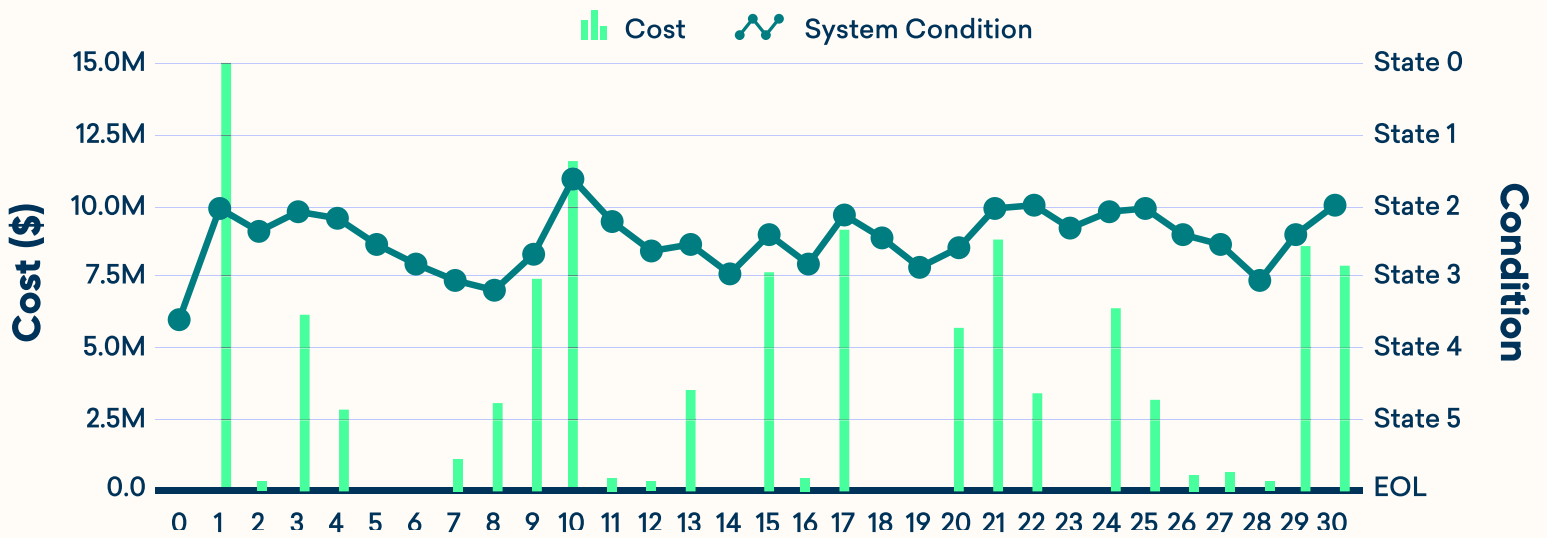
> **WHY IT MATTERS**

Make a case for justifying or increasing your budget with these detailed, comparative stats.

COST PER WORK ORDER

Location	Cost
Cedarville	$90.51
Erie	$69.75
Statesville	$315.18
Green Hope	$169.61
West Elm	$150.83
Turnersville	$74.68
Hampton	$74.51
Buckhorn	$71.88

COST PER SQUARE FOOT

Location	Cost
Hereford	23¢
Brookshire	23¢
Oakhedge	23¢
Verthaven	22¢
Linmoor	16¢
Highwick	16¢
Southcliff	11¢
North Erdell	11¢

COST PER CRAFT

Craft	Cost
General	$102
HVAC	$754
Lighting	$150
Painting	$70
Plumbing	$545

Facility Systems Funding Strategies

Chart legend: Cost, System Condition

Y-axis (left): Cost ($) — 0.0, 2.5M, 5.0M, 7.5M, 10.0M, 12.5M, 15.0M

Y-axis (right): Condition — State 0, State 1, State 2, State 3, State 4, State 5, EOL

X-axis: 0, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30

> KEY STAT

Facility Systems Funding Strategies

> **WHAT IT SHOWS**

Three different funding options for facility systems, up to 30 years out.

> **WHY IT MATTERS**

Quickly compare and communicate the impact of multiple funding scenarios on facility systems condition, performance and desired community needs.

"This will enable us to better communicate our investment options with our executives and also submit a compelling and evidence-based submission to our regulator in a few years' time."

AARON SMITH, WANNON WATER

Chapter 3

Justifying hiring

So, the day has finally come when you'll meet with your boss to ask for a hiring budget to add to your team. What types of data and arguments will you need to present? What will help you prove your point of requesting more help when you know the budget is already tight?

You need strong evidence to help you justify hiring

Whether you're wanting to add one new employee or five, your boss isn't going to approve it without any proof. Prove your point with organized reports that exhibit how new hires will increase your capabilities and efficiencies.
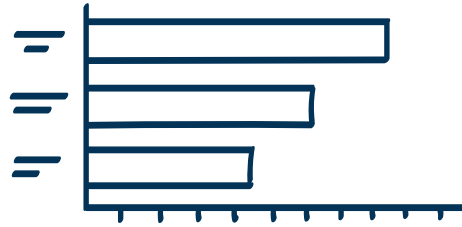
Avoid spending weeks or months making those reports with simple data gathering tools
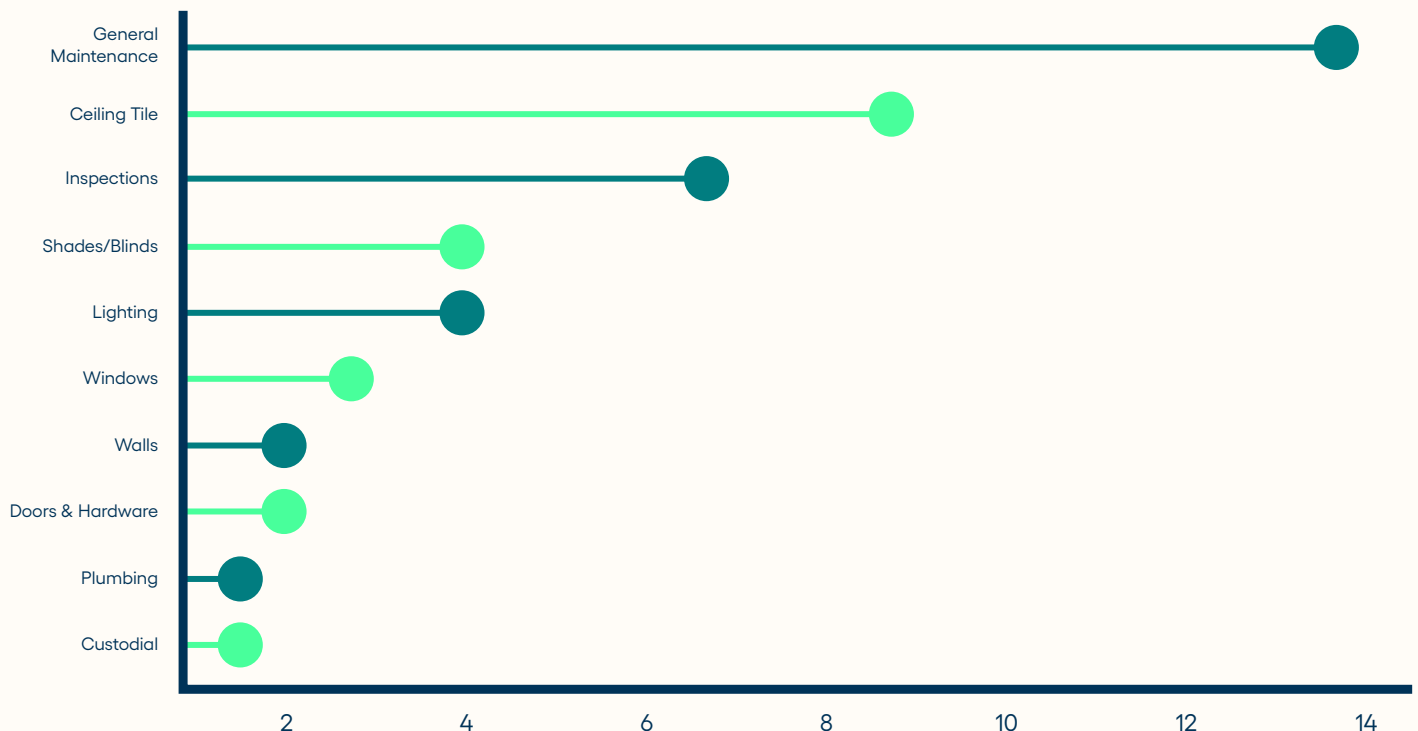
> KEY STAT
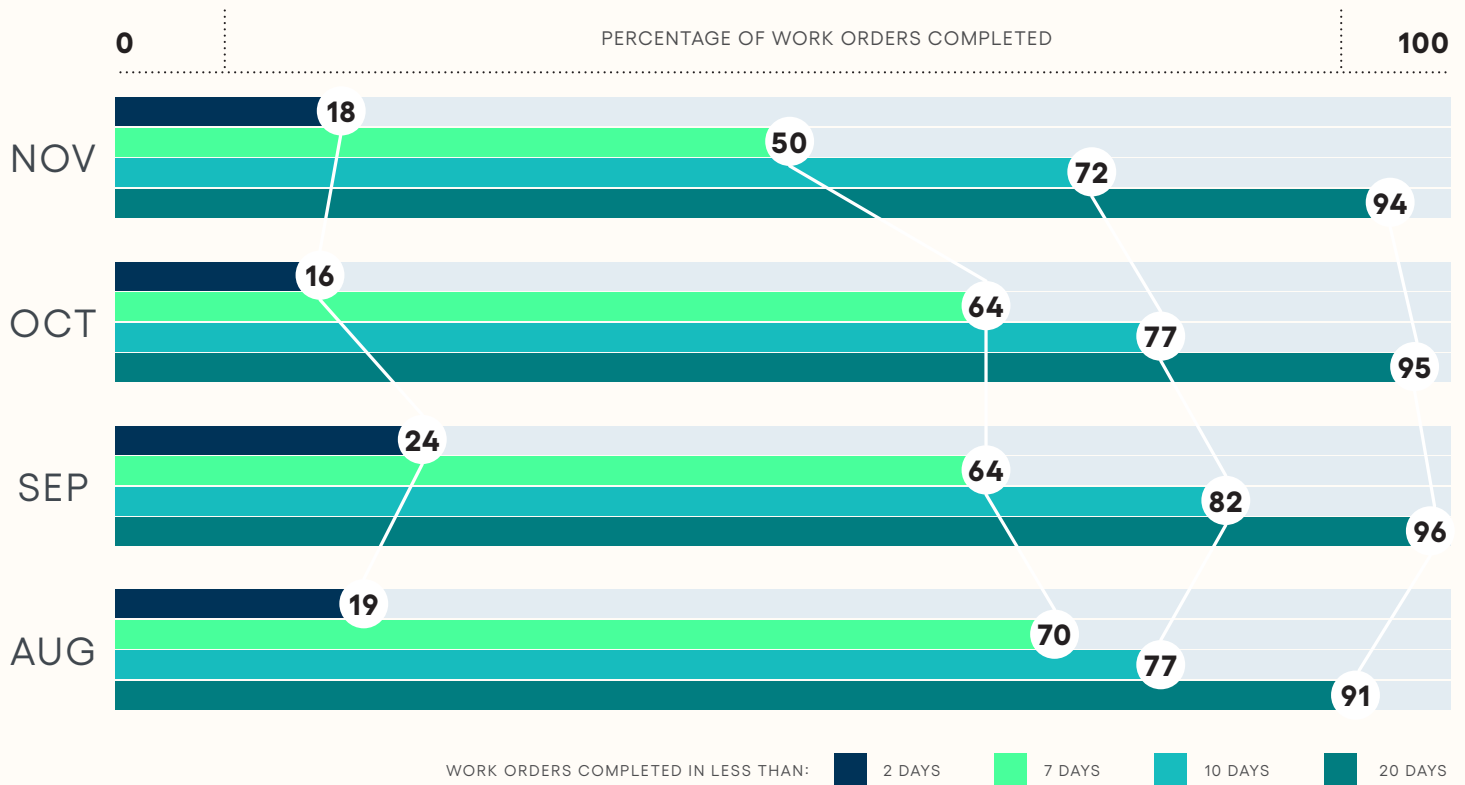
Craft by Location

> WHAT IT SHOWS

How much maintenance is required in different parts of your facility based on work order data.

> WHY IT MATTERS

Show evidence of where your team may need extra help and advocate for the type and number of employees you need.

Work Orders by Craft

PERCENTAGE OF WORK ORDERS COMPLETED

0   100

NOV
18
50
72
94

OCT
16
64
77
95

SEP
24
64
82
96

AUG
19
70
77
91

WORK ORDERS COMPLETED IN LESS THAN: ■ 2 DAYS   ■ 7 DAYS   ■ 10 DAYS   ■ 20 DAYS

> KEY STAT

Productivity Report

Percentage completed in days

> WHAT IT SHOWS

How many work orders are completed in how many days.

> WHY IT MATTERS

Make a case for your hiring needs by showing what your team is able and not able to accomplish on a daily basis

NAME	HOURS AVAILABLE	HOURS ASSIGNED	MEAN DAILY UTILIZATION	MAX DAILY UTILIZATION %
Van Carter	40.00	18.00	45.00	87.50
Scottie Heatie	40.00	19.50	48.75	106.25
Mary Nettleton	40.00	0.00	0.00	0.00

SCHEDULE - SCOTTIE HEATIE

	Monday	Tuesday	Wednesday	Thursday
12PM				
1PM		Fire Protection System Inspection		Fire Protection System Inspection
2PM				
3PM				Dining Hall Daily Service
4PM	AHU Inspection		AHU Inspection	Dining Hall Daily Service
5PM				

> KEY STAT

Workflow Management Report

> WHAT IT SHOWS

Stats on technicians' work, time and week ahead.

> WHY IT MATTERS

See where your team is at and be able to balance workload accordingly.

"It was one meeting, a 30-minute conversation and he gave me approval to hire someone else. If I hadn't been able to compile that data, it wouldn't have happened."

BRANDON FOWLER, CANTERBURY COURT

Chapter 4

Justify repair vs. replace

Some assets and equipment around your facility are starting to show a lot of wear and tear, requiring more of your team's attention. They may have even undergone multiple repairs and could be starting to become a money pit. How do you know whether you should repair or replace the equipment, and how do you get the budget approved for either?

Can you justify your budget?

We know that your facility running smoothly depends on your assets and equipment working well and keeping your employees and patrons safe and coming back. Since so much is riding on your organization running smoothly, it can cause problems when essential equipment breaks down or needs to be fixed.

You need a system with data and forecasting tools to be able to justify the repair vs. replace argument, such as numbers on:

- Reactive vs. planned maintenance

- Asset lifecycle

Organizations that are currently using a CMMS reported an average of

17.8%

reduction in maintenance, repairs and operation (MRO) inventory[1]

> KEY STAT

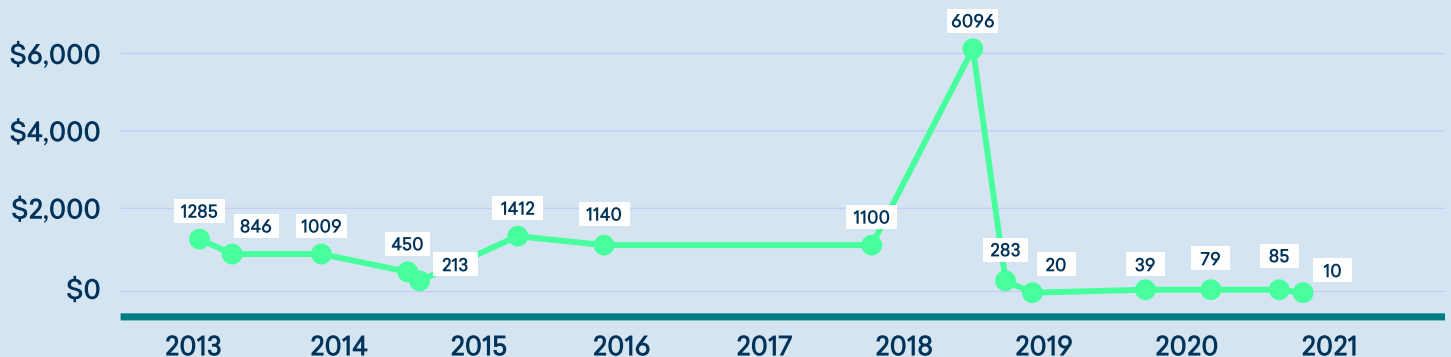# Asset Trend Analysis Report

> WHAT IT SHOWS

Key stats of assets over a length of time with a trend for work order cost.

> WHY IT MATTERS

Get a better picture of how your asset is trending and make decisions based on that data.

Cost by Log Entry Date

Asset risk & health

Asset name	Air handling unit
Asset category	HVAC & AC units

92

Overall asset health score

Key factors

Excellent

PM schedule

Good

Work orders last month

Fair

Asset age

Excellent

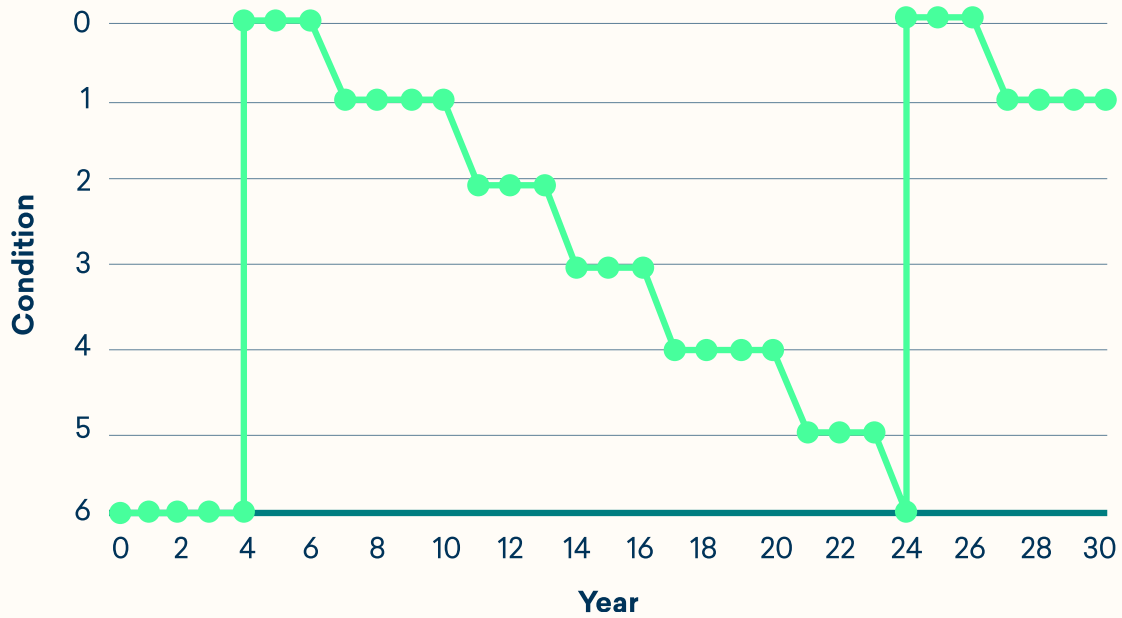Days to complete WO

> KEY STAT

Asset Risk & Health Score

> WHAT IT SHOWS

An overall score for your asset and ratings for key factors (in green, yellow or red).

> WHY IT MATTERS

This gives you a quick view of the state of your asset to help you find and fix assets at risk.

SYS-00000297: CONDITION BY YEAR

> KEY STAT

System Lifecycle Report

> WHAT IT SHOWS

See the facility system replacement value, year and system degredation.

> WHY IT MATTERS

This data makes it easy to communicate with stakeholders at all levels of lifecycle management expertise.

"If I want to find out about a piece of equipment or how many work orders an individual has completed — anything within the system — I can glean the reports rapidly at a glance."

BARRY DEAN, APRILAIRE

Chapter 5

Justify retrofitting

So, you just spent a good bit of time and money to do a lighting retrofit in one of your buildings. You're wondering if the savings from the changes are worth everyone's time and money to implement at other locations. How do you decide?

Can you justify retrofitting?

Maybe you just retrofitted some lighting and you want to see if it was a good decision, since it might make sense to replicate in other facilities. You'll need some solid research and specific data to prove to yourself and to others that it was worth it.

Take advantage of reporting that combines data to easily tell how much a certain project saved you, showing if the retrofit is a good or bad decision for your needs.

60.2%

How much less kWh/day/ building is used by organizations THAT USE energy management software at a high amount versus a low amount[2]
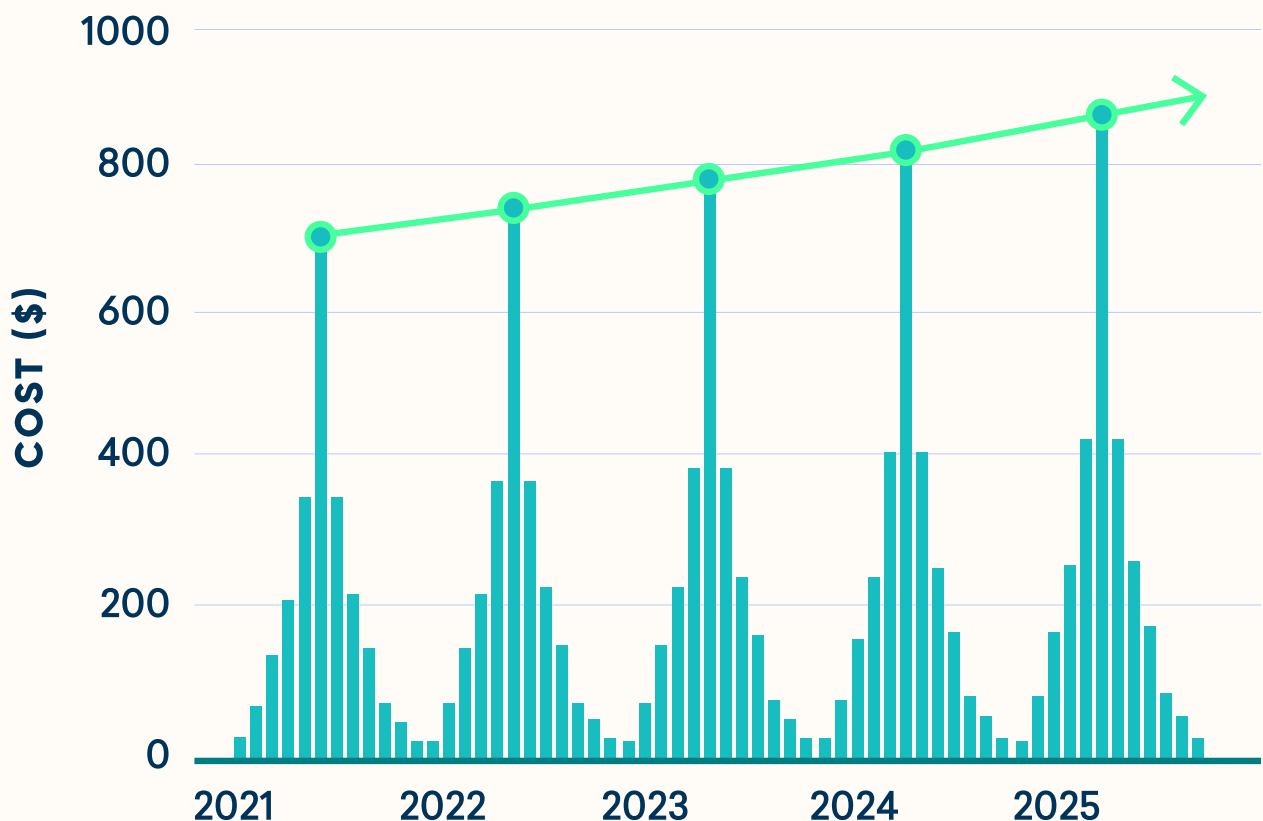
> KEY STAT

Capital Projects Report

> **WHAT IT SHOWS**

Estimated savings by month for certain capital projects over 10 years of time.

> **WHY IT MATTERS**

Modeling capabilities allow you to estimate payback periods and ROI to confidently say yes or no to certain projects.

Chapter 6

Start future-proofing

With our simple maintenance, asset and energy management tools, you'll be prepared for almost anything

Even in the tight budgets and reduced resources that you face today, these reports can equip you with the jumpstart you need to plan ahead and future-proof your success.

And we're here to help!

Sources

1 "8 ROI Stats on the Benefits of a CMMS," Dude Solutions. https://www.dudesolutions.com/resources/8-roi-stats-benefits-cmms

2 "Navigating the New Normal: How 2020 Affected Energy & Utilities," Dude Solutions. https://www.dudesolutions.com/resources/navigating-new-normal-how-2020-affected-energy-utilities

ABOUT BRIGHTLY SOFTWARE

Dude Solutions is a leading software-as-a-service (SaaS) provider of operations management solutions to education, government, healthcare, senior living, manufacturing and membership-based organizations. For 20 years, Dude Solutions has inspired clients to create better work and better lives. We combine innovative, user-friendly technology with the world's smartest operations engine, empowering operations leaders to transform the most important places in our lives. Today, more than 12,000 organizations use our award-winning software to manage maintenance, assets, energy, events and more. For more information, please visit **dudesolutions.com**.

866.455.3833   /   info@brightlysoftware.com   /   brightlysoftware.com

ꓥrightly