



CRE property management assessment

Your building operations scorecard

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This scorecard provides a detailed evaluation of your building's operational approach across five key areas: work order management, preventive maintenance, building inspections, occupant experience, and communication.

Your results highlight strengths and pinpoint areas for improvement, helping you to prioritise actions and technology investments that will enhance the efficiency and effectiveness of your building operations. Use this scorecard to maintain high standards, implement best practices, activate the most modern proptech, and ultimately, deliver a superior experience for your occupants and stakeholders.

Check each of the boxes that apply to your building(s). Leave boxes blank that do not apply to you. Your score will automatically be calculated at the end of each section.

Work order management

When I think of my **work order management**, I have:

A system for occupants to submit work orders easily (e.g., online portal) ☐

A clear process for staff to generate internal work orders ☐

A simple way to categorise work orders by urgency and importance ☐

A simple way to route work orders to appropriate staff or external contractors promptly ☐

A tracking system to monitor the status of all work orders ☐

A way to quickly generate regular reports on work order completion times and types of issues reported ☐

A way to easily solicit occupant feedback on completed work orders to ensure satisfaction ☐

Your Total Score:

Your results: Work order management (Maximum: 7 points)

- **6-7 points:** Great job on your work order management! Keep maintaining and refining your processes. Stay on the lookout for any digital tools that could enhance your operations. It might also be beneficial to engage with your software vendor to stay updated on new features that can help you maintain your momentum.
- **4-5 points:** You have a strong foundation, but there's room to get even better. Focus on enhancing automation and incorporating more feedback mechanisms to fine-tune your processes.
- **2-3 points:** Your work order management system could likely benefit from significant improvements. Consider adopting or optimising digital tools to make your operations more efficient.
- **0-1 points:** You may have a lot of work to be done here. Consider a comprehensive overhaul of your current system to address the inefficiencies and better organise your workflow.

Preventive maintenance

When I think of my **preventive maintenance programme**, I know my team:

| | | |
|--|---|---|
| Developed and adheres to a yearly preventive maintenance schedule for all building systems (HVAC, electrical, plumbing, etc.) <input type="checkbox"/> | Maintains detailed records of all maintenance activities, including dates, details of work performed, and any issues found <input type="checkbox"/> | Conducts regular inspections as part of the preventive maintenance schedule to identify potential issues early <input type="checkbox"/> |
| Schedules updates and system upgrades as needed to improve efficiency and reduce long-term costs <input type="checkbox"/> | Uses digital tools to manage and track preventive maintenance tasks <input type="checkbox"/> | Trains staff regularly on preventive maintenance procedures and best practices <input type="checkbox"/> |
| Benchmarks maintenance performance against industry standards <input type="checkbox"/> | Your Total Score: | |

Your results: Preventive maintenance (Maximum: 7 points)

- **6-7 points:** Outstanding preventive maintenance programme! Keep up the excellent work with detailed records, consistent schedules, and staying current with updates and upgrades. Continue leveraging your digital tools and maintaining staff training.
- **4-5 points:** You're doing a good job, but there's room for enhancement. Review your current practices, particularly focusing on the use of digital tools and staff training to ensure all aspects of your preventive maintenance are covered comprehensively.
- **2-3 points:** Your programme is solid but has room for improvement. Develop a more detailed schedule, utilise digital tools, and enhance staff training to ensure thorough and efficient maintenance practices.
- **0-1 points:** Your preventive maintenance programme needs attention. Develop a comprehensive maintenance programme, maintain detailed records, and invest in digital tools and staff training to build a strong foundation.

Building inspections

When it comes to **inspections**, my property management team:

| | | |
|--|---|--|
| Schedules regular inspections for fire safety, elevators, HVAC systems, and other critical components <input type="checkbox"/> | Ensures all inspections are compliant with local regulations and standards <input type="checkbox"/> | Keeps up-to-date records of all inspection reports and corrective actions taken <input type="checkbox"/> |
| Implements a process for addressing and documenting any deficiencies found during inspections <input type="checkbox"/> | Uses digital tools for scheduling and tracking inspection activities <input type="checkbox"/> | Conducts follow-up inspections to ensure deficiencies are resolved <input type="checkbox"/> |
| Provides regular staff training on inspection procedures and compliance requirements <input type="checkbox"/> | Your Total Score: | |

Your results: Building inspections (Maximum: 7 points)

- **6-7 points:** Exceptional inspection processes! You're excelling in staying compliant, maintaining records, and using digital tools. Keep up the excellent work and continue providing training to your staff.
- **4-5 points:** You have a solid inspection process, but there's room for improvement. Review your use of digital tools and ensure continuous training for your staff to enhance compliance and efficiency.
- **2-3 points:** Your inspection process has some holes to fill. Focus on leveraging digital tools, maintaining records, and training staff to build a more comprehensive inspection regime.
- **0-1 points:** It may be time to revamp your inspection process. Develop a thorough inspection schedule, use digital tools, ensure compliance, and provide staff training to establish a strong inspection protocol.

Occupant experience

I manage and improve **occupant experience** by:

Establishing clear communication channels for occupants to report issues and provide feedback ☐

Ensuring building amenities and services (e.g., cleaning, security, parking) are well-maintained and meet occupant expectations ☐

Organising events and initiatives to foster a sense of community among occupants ☐

Conducting regular surveys (beyond a yearly survey) to gauge occupant satisfaction and identify areas for improvement ☐

Providing timely responses to occupant enquiries and issues (fewer than 24 hours after work order submitted) ☐

Regularly updating occupants on what is going on in and around the building ☐

Offering a mobile app so occupants can stay continuously connected to other occupants and the property management team ☐

Your Total Score:

Your results: Occupant experience (Maximum: 7 points)

- **6-7 points:** Excellent occupant experience management! You're effectively communicating, maintaining amenities, and fostering community. Keep up the great work and continue engaging occupants with appreciation programmes and regular updates.
- **4-5 points:** Strong occupant experience, but there's room for improvement. Focus on enhancing your communication and responsiveness, as well as expanding occupant appreciation programmes.
- **2-3 points:** Fair, but several areas could use more attention. Improve your communication channels, maintenance of amenities, and consider more frequent occupant engagement through events and updates.
- **0-1 points:** Your occupant experience has a lot of room to grow. Develop clear communication channels, ensure services meet expectations, and increase occupant engagement with surveys, updates, and appreciation initiatives.

Building communication

My team's **communications plan** consists of:

Maintaining a robust internal communication system for building staff and management ☐

Emergency communication protocols for various scenarios (e.g., fire, power outage) ☐

Regular training and time set aside to practise protocols for various scenarios ☐

Consistent newsletters or updates to occupants to keep them informed about building operations, upcoming maintenance, and other relevant information ☐

Regular meetings with key stakeholders (property managers, maintenance teams, occupants) to discuss ongoing issues and improvements ☐

A way to quickly respond to occupant enquiries and requests ☐

Implementing a feedback mechanism for continuous communication improvement ☐

Your Total Score:

Your results: Building communication (Maximum: 7 points)

- **6-7 points:** Outstanding communication plan! You're doing a great job maintaining robust internal and external communication channels. Keep leveraging digital tools and continuously improve with feedback mechanisms.
- **4-5 points:** You have a strong communication plan, but there's room for improvement. Focus on enhancing your use of digital tools, such as chatbots, and implementing a feedback system to ensure continuous improvement.
- **2-3 points:** Your communication plan is fair but would benefit from significant enhancements. Improve your internal and external communication strategies and incorporate more regular training and feedback mechanisms.
- **0-1 points:** Your communication plan could use an upgrade. Develop a comprehensive strategy covering robust internal systems, emergency protocols, regular updates, and stakeholder meetings, and make use of digital tools and feedback mechanisms for continuous improvement.

Conclusion

Your above results offer valuable insights into the efficiency and effectiveness of your current building management practices. By leveraging the feedback provided, you can take actionable steps toward refining your operations and enhancing your occupant experience.

Remember, consistent evaluation and adaptation are key to maintaining optimal building performance. You can utilise this scorecard as a living document, revisiting it to track your progress and update your strategies as needed.

At Building Engines, a JLL company, we provide a variety of proptech solutions for outstanding building operations. Together, we can ensure your building remains a well-managed, efficient, and highly desirable place for occupants. Reach out to one of our experts today!

Contact us →

