



Start-to-Finish Preventive Maintenance Guide



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Even during a run-of-the-mill business year, proactive facility maintenance requires real-time analytics and planning to keep a building's engines humming. Since our world has been anything but average since COVID-19 hit, that need has only intensified. One of the most valuable lessons for facility managers has arguably been the importance of a strategic preventive maintenance plan for everyday operations and crises.

"An ounce of prevention is worth a pound of cure."

— Benjamin Franklin, Philadelphia fire safety promotion, 1736

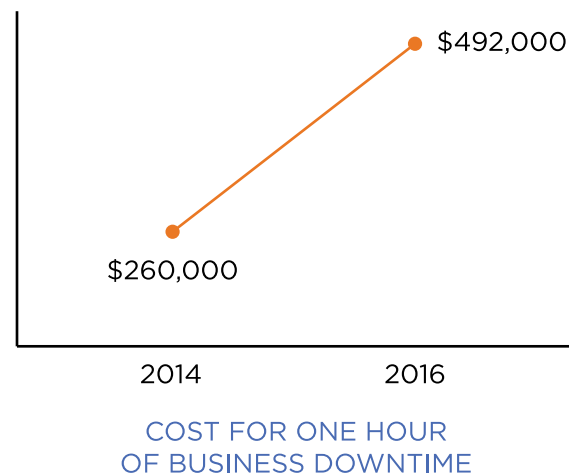
By staying ahead of both foreseeable and unforeseeable obstacles, facility management teams can address the maintenance, upgrades, and replacement of workplace assets including HVAC, lighting, computers, furniture, printers, equipment and kitchen appliances.

In this guide, we will define preventive maintenance and what it means for today's businesses. Then, we'll describe three critical steps to creating a solid, sustainable plan. Finally, you will learn how technology empowers facility and workplace management teams.

Preventative Maintenance Defined

It is not hard to see that [preventive maintenance](#) involves the upkeep, improvement, and replacement of facility assets. Regardless of business size and location, all workplaces contain components that require maintenance.

Ignoring preventive maintenance can be costly. According to a report by [Aberdeen](#), a global B2B behavioral marketing firm, the cost for one hour of business downtime grew from \$260,000 in 2014 to \$492,000 in 2016. That figure is likely much higher today.












One note: preventive maintenance and [corrective maintenance](#) are not the same. The latter is an on-demand service that corrects a specific issue at an unplanned time. Preventive maintenance is predictable and can reduce the frequency and costs for corrective maintenance by performing periodic upkeep, scheduled inspections, and cleaning at regular intervals.

Preventative Maintenance Plan Basics

A preventive maintenance plan provides a comprehensive overview of the systems that govern your facilities and assets, and the processes to keep them in top shape.

The most common components of a preventive maintenance plan include:

-  HVAC
-  Fire Safety Systems
-  Plumbing
-  Lighting
-  Electrical
-  Mechanical
-  Landscape
-  Janitorial
-  Equipment

The purpose of identifying these systems and assets is to break down the level of upkeep each requires. This allows facility management to further identify the scope of both general building maintenance and proactive tasks.

There are three important steps to develop an effective preventive maintenance routine:



Itemize All Assets

It is next-to-impossible to set an effective preventive maintenance schedule without an inventory all workplace assets.

Collect information and documentation about each asset's age, maintenance procedure by manufacturer, use history, upgrade dates, and technical diagrams. For support systems like HVAC, refer to building architectural drawings or space plans for system layouts.



Set Maintenance Procedures and Timetables

With asset inventory in hand, the next step is to outline specific preventive procedures for each component and system. Tasks should align with manufacturer recommendations, but do not take standard procedures as gospel. Some



maintenance may need to be augmented due to crises (think COVID-19) and how/when/where assets are used.

Ask these questions to build your scheduling process:

- **Is the procedure concurrent?**
- **At what frequency?**
- **Do assets require different maintenance at different times?**
- **Do I have the right personnel to do the required work? Is outsourcing an option?**

Finally, determine how your company governs maintenance work orders. You will need to evaluate maintenance budgets, set resource allocations, issue work orders and approvals, determine overall workload, and outline how invoices are paid.



Prioritize

It is important to realize you cannot do everything at once. Prioritizing preventive maintenance is a must, especially when resources are scarce, and you may be unable to stay on a set schedule.

The operative word here is critical. Preventive maintenance may not be an exact science, but you still can prioritize what matters most to your business. This is more important when crises like a pandemic or natural disaster alters typical routines.

Create a priority list by asking:

- **What equipment is coming close to lifespan?**
- **What will need to be repaired vs. replaced?**
- **What is the estimated timeline for equipment replacement?**
- **What is the potential to have the replacement on site to minimize downtime or productivity?**

As with any maintenance plan, cost always plays into how to determine service priorities. Consider charges for both regular maintenance and repairs/replacements. If you choose to delay preventive maintenance and an asset fails, be ready to incur the costs of lost employee work time and productivity – plus what a service vendor may charge you for an emergency fix.

Prevention Starts and Ends with Powerful Software

There may have been a day when tracking and managing asset maintenance on paper or in a spreadsheet was good enough. Today's workplaces and facilities are more complex. With the rise of remote work and agile strategies (hotel desks, hybrid schedules, etc.), the use of integrated technologies for preventive maintenance are not an option – they are a must.

Thanks to Integrated Workplace Management Systems ([IWMS](#)) and Computerized Maintenance Management Systems ([CMMS](#)), facilities managers can take static checklists and turn them into dynamic, connected preventive maintenance strategies.

Software can take the variables of a static checklist and connect them to the other facets of preventive maintenance management for comprehensive and streamlined results. An IWMS and CMMS can:

- Issue alerts for upcoming, due, and overdue maintenance
- Automate recordkeeping for completed maintenance tasks
- Link maintenance tasks to a digital twin of the building
- Report on scheduled and unscheduled maintenance for capital systems
- Assign preventive maintenance tasks to in-house staff or vendors

The last bullet is perhaps the most important because it determines who makes preventive maintenance workable and viable. An IWMS allows you to assign work orders for in-house staff or external vendors. More precisely, the system lets you delegate to a specific department member or favored vendor. For in-house maintenance tasks, the IWMS can assign a specific individual to do the work.

In addition to direct delegation of tasks, you can also assign a specific date for maintenance to start and end. This ensures your facilities team never misses a necessary preventive maintenance service.

Flexibility is Key

COVID-19 disrupted more than normal business and social practices. With closed offices, stores, warehouses, and other facilities many business owners likely did not consider the importance of ongoing preventive maintenance. That can have long-term, expensive consequences.

Proper preventive maintenance should be routine, but facilities managers should focus more on consistency within those routines. If a crisis happens, your preventive maintenance plan should be flexible enough to allow for adjustments in day and time for the work, who performs the tasks, and in what order assets should be managed.

Flexibility is even more important as return-to-the-office plans are put in place. Facilities managers must not only get assets ready for on-site employees, but also keep preventive maintenance routines in place for remote workers and those on hybrid work schedules.

Benjamin Franklin famously said “An ounce of prevention is worth a pound of cure” to promote fire safety in the 1770s. That idiom holds true today as businesses face uncertain futures. Taking the steps to mitigate damage is smart space and facility management. Preventive maintenance strategies can be one of your greatest protections now and into the future.

Checklist: Strategic Preventive Maintenance in Times of Change

☐ **Identify critical systems/inventory assets**
Consider every vital part of your facility. If it needs upkeep, put it in the plan

- ☐ HVAC, plumbing, lighting, electrical, mechanical, landscape, equipment, etc.

☐ **Identify scope**
Identify the complete scope of proactive tasks

- ☐ Complete the task list for each system
- ☐ Assign a complete maintenance approach to each specific system or item

☐ **Assign frequency**
Identify system tasks by frequency

- ☐ Group tasks based on frequency of maintenance; weekly, monthly, quarterly, annually, etc.
- ☐ Include emergency action plans; testing emergency equipment and providing instruction for staff on how to stay safe

☐ **Integrate your asset management software and IWMS**

- ☐ Alerts for upcoming, due, and overdue maintenance
- ☐ Automated recordkeeping for finished maintenance
- ☐ Link maintenance tasks to a digital twin of the building
- ☐ Report on scheduled and unscheduled maintenance for capital systems

☐ **Prioritize facility needs**
It's important to prioritize what matters most, particularly in times of unexpected crisis management

- ☐ Identify crucial facility need
- ☐ Evaluate costs & service priorities

☐ **Consider roles and delegation**
Each section will outline the in-house process and/or vendor process for each aspect of the building

- ☐ Delegate roles directly on your dynamic checklist
- ☐ Assign in-house department/staff, or vendor
- ☐ Schedule the dates to service

☐ **Value of proactive planning**

- ☐ Reduce manual checklist overhead
- ☐ Increase productivity with decreased equipment downtime
- ☐ Reduce costs by extending equipment lifespan
- ☐ Gain employee confidence in safe workplace environment

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