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FM MOBILE ESSENTIALS

5 Minute Guide
to Asset Data Collection

5 - steps to save time, reduce costs and eliminate paper

Save time, reduce costs and eliminate paper in asset data collection. A 5-step, 5-minute guide.

Use modern mobile technology to enhance your asset collection performance and improve the quality of data. This guide will help Facility Management businesses enhance their asset collection performance, improve quality of data and deliver successful surveys in 5 easy but key steps.

5 Key steps

1st	2nd	3rd	4th	5th
Planning	**Process**	**Quality**	**Delivery**	**Data**

Many Facilities Management businesses face continuous challenges when it comes to asset data collection. "You can't manage what you can't measure" is even more valid when applied to asset surveying. Existing software often needs complex configuration changes and may not work offline. Too much time is spent converting paper surveys, and a lack of control over asset data collection can result in poor customer service, delayed projects and unhappy clients.

Relying purely on an everyday modern technology platform and an application strategy, is simply not enough in today's demanding FM market.

Having a set of processes and operational standards is critical to achieving long term success with asset management. These standards should align and integrate to your asset collection and verification platform.

An Asset Management Framework that defines how to minimise risks and maximise asset value should strongly be considered when setting out asset collection processes.

The key elements of any asset technology platform should support:

- Collection Standards

- Quality Assurance

- Performance Management

- Data Management/Analytics

Preparation and Planning

Asset surveys are often complex, dynamic projects. Setting out some key constraints and management controls at the start helps drive quality and timescales. It is crucial to set the scope down to the most granular level possible to help surveyors focus their efforts on what is most important. This ensures relevant data is collected, avoiding under-collection and costly revisits.

One of the most important documents to produce is an **Asset Hierarchy** which describes systems and components along with individual attributes for each asset type. Your chosen solution should support multiple Asset Hierarchies for different projects and customers.

An **Engineering Brief** should also be produced that sets out the scope of work. This important document defines requirements and should include:

- The scope of work
- Rules around barcode labelling
- Photographs and health and safety on site
- Clear expectation of the surveyors

When working with an existing **Asset Register**, one of the biggest decisions is whether to carry out a resurvey or verification. If the location and Asset Register data is poor quality from the start, verification surveys can lead to delays and frustration in the field. In these situations, a full resurvey with desktop verification and gap-analysis is better and results in quality data.

- Design structured Asset Coding and Location Hierarchies

- Challenge whether asset types should be collected individually or counted per floor or per building.

- Write an Engineering Brief that clearly defines expectations for the surveyors

- Provide thorough training. Ideally escort surveyors through real-world buildings that are similar to the estate due to be surveyed.

- Carry out a single-building Pilot Project to validate coding structures and reporting output. (If a project is large enough, use a pre-surveyed building to test the surveyors.)

5 Key steps

Planning — 1st

Process — 2nd

Quality — 3rd

Delivery — 4th

Data — 5th

Managing The Process

An **Asset Hierarchy** defines the coding and structure of your asset classification system. Its structure can be aligned to existing classification systems such as Uniclass, Uniformat and NRM in an attempt to unify coding. Don't be alarmed if not 100% successful as these alignments rarely are. You will likely need to fill in gaps or missing data in each classification.

Coding structures should be designed to meet both operational and maintenance requirements. **Mappings** to other coding systems should be a secondary goal. Your chosen solution should support links and mappings to various coding strategies.

Your asset management processes should define the broad approach to asset data collection. Any software solution should enforce these rules on a per-project basis.

For Example

- Barcode/QR Code/NFC Tag required
- Condition Grading
- Criticality
- Mandated Photographic Evidence
- Asset Parenting rules
- Environmental Factors
- Risk Classification
- Links to CIBSE Guide M Life expectancy (or similar)
- Links to Industry Cost benchmarking such as BCIS/SPONs/NSR

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Quality Management

Asset Surveys are renowned for their difficulty in achieving consistent coverage and quality. Having the right software, coding and training does not guarantee quality during a collection exercise. Most organisations cite surveyors as the main reason for poor asset data quality, and a common concern is often the quality of the surveyors.

It is important to drive consistency between surveyors and create an environment that provides control and management to the survey process in real time. To ensure this, it is crucial that your software solution supports vital key elements such as:

- For each project, you should set out the minimum expected **asset requirements** per building. Your software should provide a check before leaving site.

- Carefully define **Compulsory and Advisory attributes** for each asset type.

- Minimise the use of plain text input fields, and set out a list of **banned words** to nullify any short cuts/bad practises from surveyors.

- Understand and manage surveyor behaviour in real time. **Identify patterns** that contribute to poor quality.

- Monitor surveyor **collection rates** and productivity on a daily basis.

- Track the number of manual data edits post-collection. Large numbers of changes indicate issues during asset collection.

- **Timeline** surveyor activities such as Arrival on Site (GPS Tracked), first Asset Collected, last Asset Collected, Out of Hours Updates.

- Recording all delays on site allows you to understand common issues the surveyors face and provides an opportunity to set out remediation plans quickly at the outset of a project.

- For large scale projects, put in place a formal **training program** with certification.

- Review the first few weeks of a surveyor's collection data for quality. Be prepared to make appropriate changes quickly - don't wait months to **quality assure** their data.

- Track the number of site revisits and erroneous data per surveyor to see if any **patterns** for individual behaviour start to emerge.

5 Key steps

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mobilise your workforce...

Delivery

There are many common pitfalls once an asset collection exercise is underway. Like any project, a process of continued review and monitoring is essential to achieve the quality goals.

Operational reporting in real time is key to compliance and can identify patterns of poor quality asset data.

Key factors to consider when identifying a software solution:

- **Site Safety:** Ensure site activities cannot start without a Point of Work Risk Assessment being completed by the surveyors.

- **Training:** Identify areas of further training/support for surveyors through metric based analysis.

- **Costs:** Integrated Time and Expenses help to track all work activities and expenditure for a project. Environments such as Prisons/Government Buildings impose access/exit delays that consume time during a working day. These events can be tracked and monitored to measure against project estimates and assumptions.

- **Surveyor Time Line:** Measuring surveyor performance by number of assets per day is often inappropriate. Assessing surveyor performance by activities alongside asset collection can provide insights into other issues that could be resolved quickly.

- **Quality:** Track quality assurance progress per building and project. Identify all assets that need further supervisor investigation or site revisits.

- **Poor Data Patterns:** Quickly identify evidence of poor data collection whilst surveyors are on site.

Typical issues include:
- Multiple assets in single-asset fields
- Non-Adherence to naming conventions for location information
- Incorrect barcode formats
- Incorrect serial number formats
- Banned key words in text fields

5 Key steps

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Data and Reporting

Having access to a real-time data platform provides a vast amount of operational exception information. Relying on paper or tools such as Microsoft Excel can result in inconsistencies and are especially risky for large-scale surveys due to the level of reporting and quality required.

Receiving updates from surveyors in real time is vital to help identify and investigate inefficient collection patterns. It also helps to manage and improve the asset collection process and ultimately resolve any conflicts with project goals.

Key benefits of real-time data include:
- Identify data errors while surveyors are on site
- Encourage collaboration between surveyors and back-office team
- Live monitoring of KPIs and surveyor performance
- Quickly understand inefficiencies and target improvements
- Gain insight into performance and emerging trends

Following all 5 steps and being clear about data outputs at the outset of a project helps define the controls and configuration of the survey process. When configured correctly your software should produce all necessary asset management documentation automatically. This includes:
- Asset Register
- Geography/Space/Locations Register
- PPM Schedules
- Forward Maintenance Register (FMR)
- Base Cost Lifecycle Plan
- Risk Register
- Hazards Register

5 Key steps

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Data — 5th

Mobiess are mobile app developers delivering automation and efficiency to FM businesses. With role specific solutions Mobiess helps to save time deliver business intelligence and compliance.

Mobiess Asset Management is a modern mobile solution that delivers efficiency to asset condition surveys and asset inspections. With pre-configured data capture rules and flexible pay as you go pricing, it saves time, eliminates paper and removes spreadsheets.

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