

● FACILITIES & PPM · OPERATIONAL GUIDE

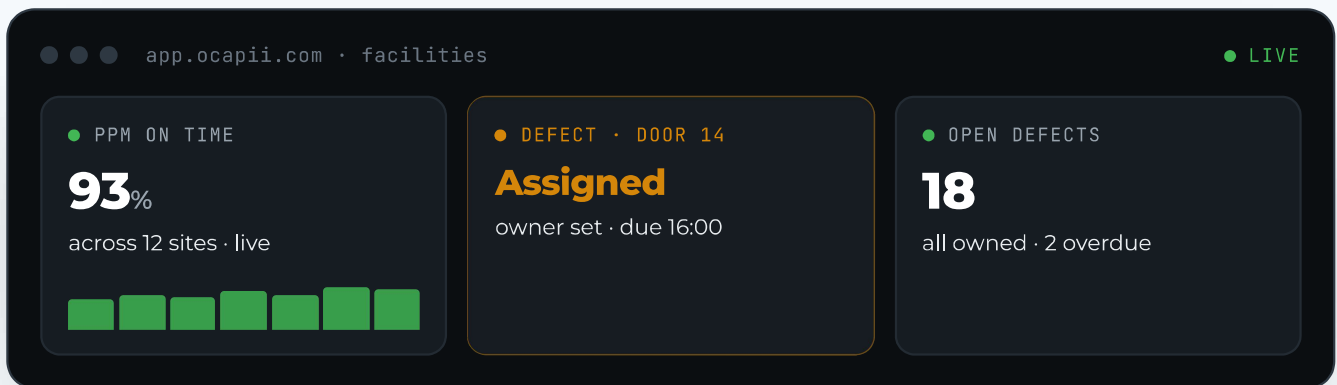
**A defect is reported. It enters an inbox. A week later it is still there. The person who reported it assumes it is being dealt with. This is how small issues become disruptions.**

For facilities, estates, operations, and maintenance leaders responsible for buildings, assets, contractors, and compliance across one site or many. Why disconnected facilities management creates risk that compounds quietly, and how to make every piece of work visible, assigned, and evidenced.

● PPM on schedule

● Every defect owned

● Compliance evidenced



# Built for the people who keep the estate running.

This guide is for facilities, estates, operations, and maintenance leaders responsible for managing buildings, assets, contractors, and compliance across one site or many. It covers why disconnected facilities management creates risk that compounds quietly, what a connected approach makes possible, and how to build a system where every piece of maintenance work is visible, assigned, and evidenced.

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# The hidden pressure inside facilities work

Facilities management is not one job. It is dozens of interdependent responsibilities, planned maintenance, reactive repairs, contractor management, compliance checks, defect reporting, room readiness, safety inspections, service requests, all running simultaneously across buildings and sites that cannot stop operating while the work is done.

The challenge is not that facilities teams lack capability. Most are highly competent, experienced, and aware of what needs to happen. The challenge is visibility. When planned tasks, open defects, contractor visits, and compliance checks are managed across spreadsheets, inboxes, paper forms, and site manager updates, no one has a reliable view of the whole picture.



## The defect that became a disruption

A reported defect that is not formally assigned, tracked, and closed is not simply an administrative inconvenience. It is a risk that compounds over time. A minor leak becomes a significant repair. A faulty fire door becomes a compliance failure. A degraded asset becomes an unplanned outage. The facilities team knew about it. The system did not.

The pressure inside facilities work is often invisible to senior leaders because the consequences of disconnected management tend to emerge slowly. Individual missed tasks are recoverable. Patterns of missed tasks, unresolved defects, and undocumented contractor activity create the conditions for significant operational disruption, compliance failure, and insurance liability.

This guide examines where facilities management systems typically break down, what connected PPM makes possible, and the questions worth asking before changing how your organisation manages its built estate.

# Five questions to ask before you change your approach

Moving to connected facilities management is not a decision about software. It is a decision about what visibility your operation needs, where your current approach creates risk, and what evidence quality your organisation actually requires.

## 1 Do you know, right now, which PPM tasks are overdue across all your sites?

Not from memory, not from a spreadsheet someone updates weekly. Right now. In most multi-site organisations the answer depends on whether a site manager has checked recently and reported back. The gap between what is overdue and what leadership knows is overdue is a common source of compliance and liability risk.

## 2 When a defect is reported, what happens next?

This reveals the most about a facilities system. In many organisations a defect is reported verbally, by phone, by email, or on paper, then enters an informal queue managed by whoever received it. No formal assignment, no deadline, no tracking, no follow-up. Everyone except the reporter and the receiver is working from assumptions.

## 3 What evidence do you hold of contractor work completed on your estate?

This tends to produce uncomfortable silences. Job sheets, sign-offs, photos, test results and certificates are frequently held in formats that are hard to locate, verify, and produce under pressure. When an insurer or regulator asks for proof of work over the past 18 months, the ability to produce it is a direct test of system quality.

## 4 Can you identify which assets generate the most reactive maintenance demand?

Reactive maintenance is the most expensive form of facilities work, and often the least well understood. The asset with repeat call-outs, the recurring fault never permanently fixed, the building taking a disproportionate share of reactive spend: these patterns exist in most operations, but are only visible where the system is designed to surface them.

## 5 THE UNANNOUNCED INSPECTION TEST

### If a compliance inspection arrived today, how confident are you in your evidence?

Fire, water, electrical, lift and gas safety each carry documentation requirements that are both legal and evidential. The question is not whether the work has been done; usually it has. It is whether the evidence is structured, current, and retrievable within the time an inspector expects, not held in paper files or a contractor portal that needs a phone call to access.

# What 'good' looks like

Across operationally complex organisations, the facilities and maintenance operations that perform most reliably share a set of structural characteristics. **These are the outcomes a well-built connected facilities management approach should consistently deliver.**



## **PPM schedules that run without manual chasing**

Recurring maintenance, inspections, and compliance checks are scheduled, assigned, and visible, without depending on someone to remember to create or chase them.



## **Every defect has an owner and a deadline**

Reported faults, hazards, and service requests are formally assigned to a person or team with a due date. Nothing sits in an unmonitored inbox or informal queue.



## **Contractor work evidenced in the record**

Every contractor visit, what was done, by whom, with what result, is captured in the same system as the task that triggered it, not in a separate filing exercise.



## **Compliance checks complete, on time, auditable**

Fire, water, electrical, and other statutory checks are completed within their required frequency, and their evidence is structured, searchable, and producible on demand.



## **Repeat faults visible across assets and sites**

When the same asset generates a repeat defect, or the same fault recurs across buildings, that pattern is visible in reporting, not discovered at an annual review.



## **Leaders see performance across all sites**

Completion rates, overdue tasks, open defects, contractor activity, and compliance status are visible at estate level, not just site level.



## **Evidence ready for inspection on any day**

A full audit pack (PPM records, defect histories, corrective actions, contractor evidence, certificates) can be produced quickly for any asset, site, or date range.

Most organisations deliver parts of this. The gap is most commonly in defect lifecycle management, contractor evidence quality, and cross-site visibility for leadership, the three areas where disconnected systems create the most significant operational and compliance risk.

# 04

## • WHAT IS AT STAKE

# The numbers behind the decision

The cost of poor facilities and maintenance management is spread across reactive repair bills, compliance failures, operational downtime, and insurance liabilities. These figures help frame the scale of what is at stake.

### \$1.4<sup>tn</sup>

#### Unplanned downtime

Annual cost to the world's 500 largest companies, primarily driven by poor asset management.

Source • Siemens 2024

### 5-40%

#### Cost of poor quality

Of revenue attributed to operational underperformance, including facilities failures and asset degradation.

Source • ASQ

### ~70%

#### Still on paper

Estimated share of the market still using manual or paper-based records as their primary management system.

OCAPII estimate



### The reactive maintenance trap

Reactive maintenance costs between three and five times more than planned preventative maintenance for the same asset type. Organisations that are predominantly reactive are not simply spending more than they need to: they are also accepting higher operational disruption, lower asset life expectancy, and greater compliance risk. The shift from reactive to planned is one of the highest-return investments in facilities operations.



### What a missed compliance check actually costs

The direct cost of a missed statutory check, a fire door inspection, water safety test, or gas safety certificate, is rarely the fee for the test itself. It is the liability created by the gap. An insurance claim, regulatory notice, or enforcement action arising from an undocumented compliance failure can represent costs an order of magnitude greater than the check that was missed.

# Six failure points in facilities and PPM management

Facilities failures that create significant operational or compliance risk tend to cluster around a predictable set of structural weaknesses. Understanding them helps identify where connected systems deliver the most immediate improvement.

FAILURE POINT	WHY IT PERSISTS
<b>The PPM that slips</b>	Planned tasks are scheduled but not tracked to completion. When an engineer is redeployed to a reactive job, the planned task moves informally and no system flags the delay. The overdue check surfaces at the next review, or at an inspection.
<b>The defect with no owner</b>	Defects are reported through informal channels and enter a queue that depends on someone monitoring it. Without formal assignment and a deadline, resolution depends on memory and goodwill rather than system-driven accountability.
<b>The contractor with no record</b>	Contractors complete work on site. The evidence is sent by email, carried on paper, or held in a portal that requires a call to access. When evidence is needed, the search begins.
<b>The repeat fault that compounds</b>	The same asset generates a fault, is repaired, and fails again. Without reporting that surfaces the pattern, the decision to replace rather than repair is never triggered, and cumulative reactive cost exceeds the capital cost of replacement.
<b>The compliance gap that becomes a liability</b>	Statutory checks carry legal and evidential documentation requirements. When records sit on paper, in email, or in portals, the evidence is not genuinely on demand. The gap between completion and retrievable evidence is a liability.
<b>The multi-site blind spot</b>	Site managers know their own buildings. Central leaders assemble a fragmented picture from reports, calls, and visits. The outlier site, with the most overdue tasks and weakest compliance record, is rarely visible until it becomes a significant problem.

The structural problem connecting all six is the absence of a single connected view. Each failure occurs in a system gap: between the report and the assignment, the assignment and the completion, the completion and the evidence, and the site and the centre.

# What connected facilities management actually changes

Connected facilities management is not a digitised version of a paper system. It changes the fundamental nature of how maintenance work is managed: from fragmented and reactive to structured and evidenced.

BEFORE	AFTER
Tasks managed through spreadsheets and inboxes	<b>Planned and reactive work managed in one connected platform</b>
Maintenance schedules depend on manual tracking	<b>Recurring tasks and inspections scheduled and auto-assigned</b>
Defects reported through calls or messages	<b>Defects captured with photos, priority, owner, and deadline</b>
Contractors provide evidence separately	<b>Contractor activity linked to tasks and completion records</b>
Managers chase updates manually	<b>Dashboards show open, overdue, and completed work live</b>
Leaders see limited asset history	<b>Reporting shows trends, repeat faults, and site performance</b>



## From reactive admin to live operational control

The goal of connected facilities management is not to remove the need for experienced professionals. It is to give them a system that matches their capability, where their time is spent on decisions and relationships rather than chasing updates, hunting for evidence, and manually assembling the picture a connected platform provides automatically.

# Industry-specific considerations

Asset types, compliance obligations, contractor relationships, and the operational consequences of maintenance failure differ considerably between a hospital trust and a restaurant group, or a multi-academy trust and a manufacturing plant.

## Food & Beverage

*High-intensity asset use with strict hygiene and compliance obligations.*

- Refrigeration maintenance records connect directly to temperature monitoring and HACCP compliance.
- Kitchen extraction needs scheduled cleaning and inspection for fire and food safety evidence.
- Multi-site operators need central PPM visibility with site-level accountability.

## Hotels & Accommodation

*Continuous operation where maintenance disruption is visible to guests.*

- Room defect management is the most volume-intensive challenge in hospitality.
- Plant rooms (boilers, chillers, water, lifts) carry statutory obligations and asset value.
- Fire and water safety documentation is a CQC and local-authority inspection focus.

## Healthcare & Care Homes

*Maintenance obligations intersect directly with patient and resident safety.*

- Legionella and water safety require documented risk assessments and corrective actions.
- Fire safety evidence faces particularly close scrutiny given vulnerable occupants.
- Estates maintenance backlogs are a recurring theme in CQC inspection reports.

## Manufacturing & Industrial

*Production continuity, safety compliance, and asset performance combined.*

- Condition monitoring at machine level finds issues before they cause stoppages.
- Permit to work and contractor management carry significant safety obligations.
- ISO and sector certification include maintenance evidence requirements.

# Industry-specific considerations

## Facilities & Estates

*The broadest challenge: portfolios that may span hundreds of buildings.*

- Estate-wide PPM visibility lets central teams manage maintenance at scale.
- Contractor performance management is backed by connected evidence, not anecdote.
- Tenant service-charge justification and SLA reporting depend on structured records.

## Education

*Consistent standards across dispersed campuses of differing ages.*

- Trust-wide PPM visibility shows where work is overdue and spend is highest.
- Fire, water and electrical evidence must be ready for Ofsted, LA and insurers.
- Contractor management carries safeguarding: DBS, supervision, access control.

## Leisure & Entertainment

*High-frequency, high-visibility maintenance affecting the customer experience.*

- Pool and spa plant carries operational and regulatory obligations.
- Safety equipment needs documented periodic testing with clear evidence.
- Event readiness and post-event defect capture need high-volume handling.

## Every sector

Wherever an estate is maintained, the principle holds: every task owned, every defect deadlined, every contractor visit evidenced.

# Making the transition

Moving from fragmented facilities management to connected PPM does not require replacing every process simultaneously. The highest-return starting point is almost always the area where disconnected management creates the most significant compliance exposure or operational risk.

## A practical approach to building connected facilities management

- 1 Start with your statutory compliance checks:** fire, water, electrical, gas, and lift maintenance are where documentation quality has the most direct legal and liability implications.
- 2 Map your current defect management process:** how defects are reported, assigned, tracked, and evidenced, then identify where it relies on informal communication rather than system-driven accountability.
- 3 Build your PPM schedule in the system before going live.** The discipline of formalising what is scheduled, at what frequency, for which assets, often reveals gaps worth addressing.
- 4 Define your contractor workflow:** which contractors work on which assets, what documentation they must provide, and how it enters the estate record, then build around those requirements.
- 5 Connect defect reporting to asset records from the start.** A defect linked to the asset it affects is the foundation for repeat-fault analysis and lifecycle planning.
- 6 Review the first month's completion data for pattern signals:** consistently overdue tasks, assets generating multiple defects, low-completion sites, and weak contractor evidence are typically visible within weeks.

The goal is not a comprehensive digital replica of every paper process. It is a connected system where every maintenance task has an owner, every defect has a deadline, every contractor visit has an evidence record, and every compliance check has an auditable trail, so the estate is demonstrably under control on any given day.

• SEE HOW OCAPII KEEPS THE ESTATE UNDER CONTROL

# The maintenance work is being done.

The question is whether anyone has a single view of it. OCAPII connects PPM schedules, defect management, contractor workflows, compliance checks, and audit-ready evidence into one live platform, so facilities teams can see what needs to happen, and leaders can see that it has. If something in this guide describes your operation, it is worth a conversation.

[Request a conversation at ocapii.com](https://ocapii.com) →