



UGL Services' New Approach to Project Management and Reporting Delivers Stellar Results

Rolling Action Item List Puts a Frame Around Open Items...

UGL Services has been providing comprehensive facilities services for a leading provider of financial services that offers mortgage, insurance, investment and advisory products and services since 2006.

Explained Kent Walton, UGL Services Account Manager, "We do all the housekeeping for all three of the company's sites, as well as the landscaping; we provide mechanical services for building systems and HVAC, including several chillers. We take care of the elevators, electrical, lighting and plumbing. We also provide mail, shipping and receiving services, audiovisual and video conferencing support, conference room scheduling and setups, as well as maintain the safety and security equipment - locks and card readers."

UGL Services also provides interior design services and space planning and some capital projects for the three main facilities and has a full crew to handle moves, adds and changes. It provides leasing and transaction services for the company's leased regional sales offices and project management services corporate wide.

Approximately 2,000 of the company's 4,500 employees work in the one-million square foot headquarters.

Comprehensive Facility Management

Naturally, most of UGL Services' resources are concentrated at the headquarters facility, but the company also has staff in remote locations. There is a need for coordination among all of the sites while remaining responsive to local requirements.

Overseeing the operations and coordinating the efforts of the two organizations is an ongoing process. Said the financial company's Operations Manager, "There are always a number of projects in process, not to mention the ongoing call center/work order activity. We want to keep on top of the day-to-day activities while planning for and implementing longer-term projects."

UGL Services uses a Maximo Computerized Maintenance Management System (CMMS) that ties into a call center in order to respond to service requests and handle routine and preventive maintenance. Other, less routine projects are separately managed outside of the CMMS system. These projects, ranging from feasibility studies, to longer-term capital projects, retrofits and research, had been regularly discussed in biweekly meetings but were not assigned in the same fashion.

Recently, Walton, a Six Sigma Green Belt, decided to apply practices from his industrial experience to the project side of the work for the customer. He introduced a concept that he had used at an industrial account that codifies the process for these less formal projects. Called RAIL for "Rolling Action Item List," Walton had used it as part of a Lean Six Sigma manufacturing program.

PROJECT SUMMARY

Customer: *National financial services company*

Industry: *Financial services*

Situation: *Applied an innovative process for reporting on and managing feasibility studies and major projects.*

Service provided: *RAIL (Rolling Action Item List) process for biweekly meetings.*

Results: *Improved project management, better communications between customer and UGL Services*

Walton’s objective was to engage the customer’s management in a structured manner in order to facilitate decision making. He wanted to go beyond the old reporting and planning approach. He said, “RAIL formalizes and encapsulates the best practices that any good facility manager uses to provide the highest levels of service, communicate with the client and capture perceived needs. RAIL focuses on management-level discussions and requests, such as feasibility studies, that may not have a work order. It may be something that one of our customer contacts has asked us to do and we need to get back to them, or it may be a long-term capital project that requires ongoing management oversight.”

RAIL improves on a previous review process where UGL Services and the customer management team would meet every two weeks to review call center reports and projects – typical retrospective management oversight of facilities services performance. The older approach, although effective for strict operations control, did not go far enough to define and manage the forward-looking projects – many of which are informal and speculative but form the basis for continual improvement.

RAIL Formalizes the Process

Under RAIL, the meetings continue to be held every other week (with ongoing frequent contact between meetings) but the process has changed. Now, the customer and UGL Services management gather in headquarters along with teams from the remote offices who conference in over the Internet using Verizon Net Conference, similar to WebEx and SharePoint. All told, about 15-16 participate in the meetings. The meetings are highly structured and the process is well defined.

RAIL’s innovation comes from the way it controls what is discussed, how projects are presented and how responsibilities and scheduling are assigned. (See graphic)

Ref. #	Start Date	Work Order #	Description	Work Order Owner	Status	Overall Due Date	Billable Y/N	Comments / Next Steps	Next Step Owner	Next Step Due Date
8	8/7/2009	C0915	2009-2010 B Ramp Fire Sprinkler project	JR	WIP	4/15/2010	N	1) Prebid Meeting 10/13/2009 2) Bids Due 10/21/09 3) Anticipated Award Date 10/26/2009 4) Construction Began	JR	4/28/2010
13	8/21/2009	C0907	Kansas AV	JR	WIP	12/31/2010	N	1) Unit sent to KC, received broken. 2) Switched Mad 17 for MAD 8 3) Shipped Mad 8 Unit 10/08/2009 4) Diagnostics In Progress 5) Next Test Date 2/3/10 10AM	Brian	4/28/2010
22	1/4/2010	C1001	2010 Misc Leaks	JR	Complete	12/31/2010	N	1) Investigation In Progress Atrium Soffit Cause determined Sealant Breach Skylight Pane 2) Glazer Contacted 2/16/10 An Repaired 3) Roof Shoveled and Inspected 2/16/10	Brian	4/28/2010
23	1/1/2010	VFA 10	2010 5910 Assessment	JR	WIP	12/31/2010	N	CAD Data	JR	4/28/2010
24	1/1/2010	TBD	2010 5810 Façade Review	JR	WIP	12/31/2014	N	Review Data	Brian	4/28/2010
26	1/1/2010	TBD	2010 C Ramp Escape Hatch	JR	HOLD	12/31/2010	N	Requested Updated RFP CW Source 3/17/10	Tony	4/28/2010
27	1/1/2010	C1003	2010 D Lot Traffic Coatings Repairs	JR	WIP	12/31/2010	N	RFP Approved 3/25/10 Awaiting Contractors Schedule	Tony	4/28/2010
30	1/1/2010	TBD	2010 CSF Roof Bi Annual Roofing Review	JR	WIP	5/1/2010	N	Awaiting Contractor Schedule For May 1st Completion	Tony	4/28/2010
32	1/1/2010	TBD	2010 Concrete Sidewalk Repairs	JR	WIP	12/31/2010	N	Contractor Contacted 3/22/10 Site Review Scheduled Week Of 4/19/10	Tony	4/28/2010
33	1/1/2010	TBD	2010 Asphalt Repairs	JR	HOLD	12/31/2010	N	RFP Sent out 4/5/10	Tony	4/28/2010

Walton explained, "The RAIL spreadsheet constantly asks 'Who owns this and when is it due?' for each of the 20-30 items that are typically discussed." Each department has its own RAIL sheet, which is video projected in the conference room and viewed on computer screens over Net Conference in the other offices. Remote office projects are discussed first to make the most efficient use of the remote staff's time.

Every item is discussed and has a specific Next Step Owner who could be on the UGL Services or the customer team. Every item also has a "Status" and hard deadline for both Overall Due Date and Next Step Due Date. There are no "To be Assigned" for staff and no "To Be Determined" for dates. Comments/Next Steps are discussed for each project at every meeting.

All changes in project status are made at the meeting so that they are apparent to everyone on both teams. Most importantly, even though Walton controls the presentation and the Net Conference, no project is removed from the list until the responsible customer manager authorizes its removal. Even then, the item is not removed from the spreadsheet; it is simply hidden so it is available for future reference. Hard copy printouts of the spreadsheet pages are also available to team members.

The meeting format encourages discussion and problem solution. It focuses the team on each item and requires progress at every meeting. The result is a much more structured process that formally addresses management-level and capital projects. Everyone from both companies knows where each project stands, who's responsible for the next step and when that can be expected. They also know that there will be a meaningful progress report in a few weeks.

"It's a much better process because it gets everybody involved," commented the customer Account Manager. "RAIL is just a better way of doing the reporting and project analysis. It enables us to get ahead on projects with the result that our overall facilities condition is continually improving."