

Chapter 8: Office Operation and Maintenance

Overview:

- In this chapter you will outline the roles and tasks necessary to operate your franchisee offices efficiently.

Goals for the chapter:

- Communicate the key roles and responsibilities for office-related positions.
- Provide short-term and long-term task lists for key personnel.
- Ensure that the obligations match the FDD and FA.

Items to gather before starting:

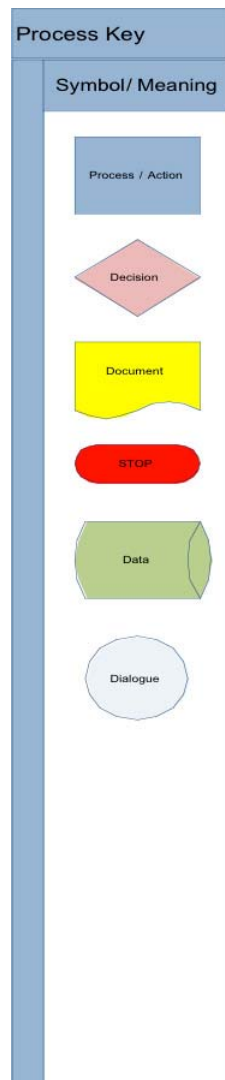
- Gather any existing task lists, organizational charts, etc. you already have in place. Items such as employee handbooks are good places to start.
- Brainstorm with your key employees to identify critical tasks. Your office manager will likely have the most pertinent information.
- Often the best way to gather operations-related information is to simply spend a few days observing. Walk around with a pad of paper and pen and write down every activity you encounter, whether turning the alarm off in the morning or checking the schedule; try to record every action. Ask your employees to do this as well – you will be surprised at how many actions occur in a given day.

Questions to consider:

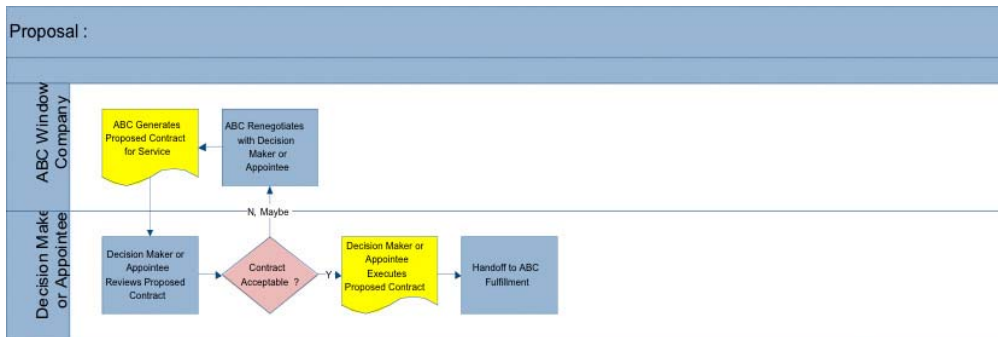
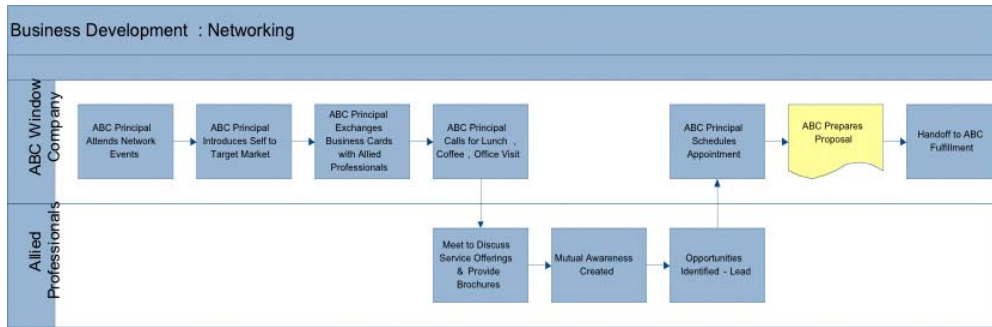
- What tasks must be performed on a regular basis? This includes daily, weekly, monthly, quarterly and annually.
- How do you see the office operation changing for the franchisees as their business grows?
- Will the tasks and responsibilities differ based on geographical location or the size of the company?
- Which items are requirements, which are recommendations?

Business processes mapping

In this section you should construct standard “swimlane” process maps for all business development, marketing, operations, sales, networking, customer service and fulfillment processes. Swimlane process maps are pictorial representations of all the processes in your business. These maps chart all activities, which are represented symbolically. Each person is represented as an actor with their own lane in a virtual swimming pool. A simple key you can use is represented as follows:



The most useful tool for rendering swimlane charts is Microsoft Office Visio. With a few hours spent learning the software, you should be able to model all business processes like the example shown below for networking opportunities and a proposal process:



Notice that each actor has a lane in the pool and all activities are represented graphically through each stage of the process. Each of the procedures that follow should be mapped out graphically for initial training purposes and ongoing training as you experience attrition in your franchise operation.

General housekeeping

A clean, well-kept office will help project a message of professionalism.

Regardless of whether your franchise is based out your home or an office location, maintaining a tidy workplace is important. Periodically clients will visit your office to drop off a payment or pick up a report. Prospective employees and other business owners will also likely visit your office. A weekly cleaning schedule with specific tasks should be developed and followed. Tasks include vacuuming, dusting, bathroom cleanup, trash, etc. Restrooms will rarely be used by customers, but will periodically be used by

prospective employees, attorneys, CPAs etc. Thus it is important to maintain clean, well-stocked restrooms. Develop a weekly cleaning schedule and ensure that it is followed.

Opening procedures

In the section below list your ongoing operating procedures and checklists. Imagine if your office manager quit without notice and you had to hire someone new immediately. Someone completely unfamiliar with your business should be able to efficiently run your office with the information supplied in your operations manual.

Office Manager

The office manager should arrive at the office 30 minutes prior to the general operating hours. This will provide the necessary time to prepare for the day before the technicians arrive.

- 1) Unlock office
- 2) Disable alarm if applicable
- 3) Check messages on voicemail. Distribute appropriate messages to employees.
- 4) Ensure that sufficient technicians are on hand to perform the necessary jobs
- 5) Assign technicians to each cleaning project
- 6) Assign appropriate vehicles to each technician or project
- 7) Brief technicians and employees
- 8) Explain assignments and vehicle usage to employees. This should be a short 10-15 minutes meeting to ensure everyone is on the same page for the day.

- 9) Verbally confirm each technician knows his or her assignment for the day
- 10) Briefly cover any issues needing immediate attention
- 11) Equipment check
- 12) Quick overview of cleaning equipment should be performed. Refer to cleaning checklists to perform the check efficiently.
- 13) Office manager and employees should perform a quick check of their work email account. If messages are time-sensitive, technicians should respond quickly to the inquiry.

Closing procedures

Technicians

Each technician is responsible for performing the following tasks, when applicable, at the end of each workday.

- Turn in all client folders to office manager, including payment and samples
- Contact clients via telephone and review results of sampling. Send finished cleaning bids to client. Reports should be sent in the format requested by the client. Appropriate formats include fax, email (PDF) or mail.

Field Manager/Lead Technician

The Field Manager or Lead Technician is responsible for ensuring that vehicles, trailers and other equipment are clean, secure and ready for the next day's use. Check that all washing equipment has been transferred from vehicles to secured office or storage location. Non-critical items can be left in properly secured vehicles overnight.

Vehicle checklist

- Doors are locked
- Ladders are removed or locked
- No valuable materials left in bed of trucks

- Vehicles parked in appropriate locations
- Lock truck canopy if applicable
- Check that all three cleaning kits are in the office or accounted for. Kits should not be left in trucks overnight.
- Install trailer hitch lock
- Check padlocks on trailer doors
- Check fuel levels. Maintain enough fuel to reach first project in the morning.

Trailers

Trailers must be ready for use first thing the following morning. It is critical to take the time to properly clean, maintain and restock the trailers at the end of each working day. The following list outlines the appropriate components to this process:

- Remove all debris and waste
- Restock supplies as necessary. Use checklist in equipment section to ensure proper supplies are available.
- Clean equipment as necessary

Office Manager

- Schedule. The schedule can be reviewed in a brief 15-minute meeting at the end of each day. All available technicians and employees should be present.
- Review schedule for following workday
- Ensure sufficient technicians and workers are available
- Notify each technician and employee of their projects for the following day. This is especially important for employees who do not work each day.
- Gather data from credit card processing machine. Remove receipt from machine.
- Lock all doors, including garage
- Check and lock all windows