



Facility Playbook

A practical tool for facility and operations leaders to see where facilities are helping or hurting, and what to change first.

This playbook is designed to help you:

- see your facilities as a system, not just a list of tasks
- identify where issues and pressure are really coming from
- clarify what “looking right” should mean in your environment
- build a short, realistic list of changes that will make the biggest difference

You can work through it on your own, with your team, or alongside a partner.

You don’t need perfect data, just honest input.

Estimated time: 45–90 minutes

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SECTION ONE

Facility Snapshot

Goal: Capture the high-level context.

YOUR ROLE AND SCOPE

Your name and title:

Primary facilities you're responsible for (campus names/locations):

Approximate total square footage:

FACILITY TYPES IN YOUR SCOPE

Check all that apply and list key sites.

- ☐ Corporate campus / headquarters
- ☐ Medical / healthcare facilities
- ☐ Manufacturing / industrial / high-security environments
- ☐ Government / municipal facilities
- ☐ Higher education campus / large campus environment
- ☐ K-12 Independent School Districts
- ☐ Controlled environments (clean rooms / data centers)
- ☐ Logistics / distribution facilities
- ☐ Other (describe):

TOP 3 STAKEHOLDERS WHO CARE MOST ABOUT HOW FACILITIES LOOK AND FEEL

Example Stakeholders:

Executives, board, clinicians, property owner, superintendent, principals

Stakeholder 1:

- What they care about most:

Stakeholder 2:

- What they care about most:

Stakeholder 3:

- What they care about most:

SECTION TWO

Where the Noise Is Coming From

Goal: Identify the spaces and issues generating the most friction.

TOP COMPLAINT SOURCES IN THE LAST 90 DAYS

List up to 5 spaces/issues that generate the most complaints, comments, or work orders.

Examples:

- **Type of Issue:** appearance, odor, cleanliness, safety
- **Who Complains:** staff, leadership, tenants, visitors, patients, families, students, parents
- **Frequency:** daily, weekly, monthly

SPACE / AREA	TYPE OF ISSUE	WHO COMPLAINS	FREQUENCY

RECENT “HIGH STAKES” MOMENTS

In the last 6–12 months, list up to 3 high-stakes moments where facilities were under the microscope (e.g., executive visit, board meeting, survey, accreditation, major client tour, school open house, parent night).

EVENT	
WHAT WENT WELL?	
WHAT DIDN'T FEEL UNDER CONTROL?	
HOW MUCH OF THAT WAS FACILITIES-RELATED?	(NONE) 1 2 3 4 5 (ALL)

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EVENT	
WHAT WENT WELL?	
WHAT DIDN'T FEEL UNDER CONTROL?	
HOW MUCH OF THAT WAS FACILITIES-RELATED?	(NONE) 1 2 3 4 5 (ALL)

SECTION THREE

What “Looking Right” Should Mean

Goal: Define success by space and stakeholder, in your language.

CRITICAL SPACES

Identify your 5–10 most critical spaces (by visibility or risk), then define what “looking right” should mean there.

Example Spaces: main lobby, executive floor, patient waiting area, production line perimeter, district main entry, resident dining room, sanctuary, flagship retail entry, flagship classroom wing, data hall

SPACE / AREA #1					
WHO SEES / JUDGES IT MOST?					
WHAT “LOOKING RIGHT” SHOULD MEAN, IN YOUR WORDS?					
CURRENT STATE VS. THAT IDEAL	1	2	3	4	5

SPACE / AREA #2					
WHO SEES / JUDGES IT MOST?					
WHAT “LOOKING RIGHT” SHOULD MEAN, IN YOUR WORDS?					
CURRENT STATE VS. THAT IDEAL	1	2	3	4	5

SPACE / AREA #3	
WHO SEES / JUDGES IT MOST?	
WHAT “LOOKING RIGHT” SHOULD MEAN, IN YOUR WORDS?	
CURRENT STATE VS. THAT IDEAL	1 2 3 4 5

SPACE / AREA #4	
WHO SEES / JUDGES IT MOST?	
WHAT “LOOKING RIGHT” SHOULD MEAN, IN YOUR WORDS?	
CURRENT STATE VS. THAT IDEAL	1 2 3 4 5

SPACE / AREA #5	
WHO SEES / JUDGES IT MOST?	
WHAT “LOOKING RIGHT” SHOULD MEAN, IN YOUR WORDS?	
CURRENT STATE VS. THAT IDEAL	1 2 3 4 5

SPACE / AREA #6	
WHO SEES / JUDGES IT MOST?	
WHAT “LOOKING RIGHT” SHOULD MEAN, IN YOUR WORDS?	
CURRENT STATE VS. THAT IDEAL	1 2 3 4 5

SPACE / AREA #7	
WHO SEES / JUDGES IT MOST?	
WHAT “LOOKING RIGHT” SHOULD MEAN, IN YOUR WORDS?	
CURRENT STATE VS. THAT IDEAL	1 2 3 4 5

SPACE / AREA #8	
WHO SEES / JUDGES IT MOST?	
WHAT “LOOKING RIGHT” SHOULD MEAN, IN YOUR WORDS?	
CURRENT STATE VS. THAT IDEAL	1 2 3 4 5

SPACE / AREA #9	
WHO SEES / JUDGES IT MOST?	
WHAT “LOOKING RIGHT” SHOULD MEAN, IN YOUR WORDS?	
CURRENT STATE VS. THAT IDEAL	1 2 3 4 5

SPACE / AREA #10	
WHO SEES / JUDGES IT MOST?	
WHAT “LOOKING RIGHT” SHOULD MEAN, IN YOUR WORDS?	
CURRENT STATE VS. THAT IDEAL	1 2 3 4 5

NON-NEGOTIABLES

For each critical space, list 1–3 non-negotiables (things that must always be true).

Examples:

- “No visible trash or spills.”
- “No noticeable odor.”
- “Entrance glass free of obvious marks or handprints.”
- “Gym floor dry and free of obvious dust before events.”
- “Restroom supplies never fully out during operating hours.”

Space 1:

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Space 2:

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-
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Space 3:

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Space 4:

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-
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Space 5:

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-
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Space 6:

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-
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Space 7:

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-
-

Space 8:

-
-
-

Space 9:

-
-
-

Space 10:

-
-
-

SECTION FOUR

System vs. Incident

Goal: Separate one-off misses from systemic gaps.

CRITICAL SPACES

Reference your *Top Complaint Sources* from Section Two to complete the below activity.

Review the list of causes below; for each complaint source, place an 'X' next to any cause that has occurred **3 or more times** in the last 90 days.

		COMPLAINTS				
		#1	#2	#3	#4	#5
CAUSES	One-off / human error					
	Coverage gap (no one clearly owns it)					
	Timing / frequency issue					
	Standard / expectation mismatch					
	Training / skills issue					
	Access / security issue					
	Product / equipment issue					

Add up the number of 'X's for each cause and write the total below.

One-off / human error:	Coverage gap:	Timing / frequency:
Standard mismatch:	Training / skills issue:	Access / security issue:
	Product issue:	

YOUR TOP 5 “SYSTEM PROBLEMS”

Now, list the five ‘causes’ from the Critical Spaces table that have the highest totals; list in order of highest total to lowest. These are **the things that keep coming back**.

Top 5 System Problems:

1.	
2.	
3.	
4.	
5.	

SECTION FIVE

Vendor and Ownership Map LITE VERSION

Goal: Get a basic picture of who owns what today.

(If you use a full Vendor & System Snapshot template, you can reference or attach it; this section is the quick version.)

LIST CURRENT VENDORS IMPACTING FACILITIES

List all vendors that are currently impacting your facilities, what areas they own, and complete the additional prompts.

Examples:

- **What they own:** janitorial, floor care, exterior & grounds, construction cleaning & space readiness, disinfection & emergency response, critical environment cleaning

VENDOR / PROVIDER #1	
WHAT DO THEY OWN?	
HOW CLEAR IS OWNERSHIP?	(NOT CLEAR) 1 2 3 4 5 (CLEAR)
HOW SATISFIED ARE YOU?	(NONE) 1 2 3 4 5 (VERY)

VENDOR / PROVIDER #2	
WHAT DO THEY OWN?	
HOW CLEAR IS OWNERSHIP?	(NOT CLEAR) 1 2 3 4 5 (CLEAR)
HOW SATISFIED ARE YOU?	(NONE) 1 2 3 4 5 (VERY)

VENDOR / PROVIDER #3	
WHAT DO THEY OWN?	
HOW CLEAR IS OWNERSHIP?	(NOT CLEAR) 1 2 3 4 5 (CLEAR)
HOW SATISFIED ARE YOU?	(NONE) 1 2 3 4 5 (VERY)

VENDOR / PROVIDER #4	
WHAT DO THEY OWN?	
HOW CLEAR IS OWNERSHIP?	(NOT CLEAR) 1 2 3 4 5 (CLEAR)
HOW SATISFIED ARE YOU?	(NONE) 1 2 3 4 5 (VERY)

VENDOR / PROVIDER #5	
WHAT DO THEY OWN?	
HOW CLEAR IS OWNERSHIP?	(NOT CLEAR) 1 2 3 4 5 (CLEAR)
HOW SATISFIED ARE YOU?	(NONE) 1 2 3 4 5 (VERY)

VENDOR / PROVIDER #6	
WHAT DO THEY OWN?	
HOW CLEAR IS OWNERSHIP?	(NOT CLEAR) 1 2 3 4 5 (CLEAR)
HOW SATISFIED ARE YOU?	(NONE) 1 2 3 4 5 (VERY)

VENDOR / PROVIDER #7	
WHAT DO THEY OWN?	
HOW CLEAR IS OWNERSHIP?	(NOT CLEAR) 1 2 3 4 5 (CLEAR)
HOW SATISFIED ARE YOU?	(NONE) 1 2 3 4 5 (VERY)

VENDOR / PROVIDER #8	
WHAT DO THEY OWN?	
HOW CLEAR IS OWNERSHIP?	(NOT CLEAR) 1 2 3 4 5 (CLEAR)
HOW SATISFIED ARE YOU?	(NONE) 1 2 3 4 5 (VERY)

VENDOR / PROVIDER #9	
WHAT DO THEY OWN?	
HOW CLEAR IS OWNERSHIP?	(NOT CLEAR) 1 2 3 4 5 (CLEAR)
HOW SATISFIED ARE YOU?	(NONE) 1 2 3 4 5 (VERY)

VENDOR / PROVIDER #10	
WHAT DO THEY OWN?	
HOW CLEAR IS OWNERSHIP?	(NOT CLEAR) 1 2 3 4 5 (CLEAR)
HOW SATISFIED ARE YOU?	(NONE) 1 2 3 4 5 (VERY)

AREAS OF OVERLAP

Complete the table below by listing all areas where ownership is unclear or multiple vendors overlap, and the vendors currently attributed.

[illegible]

Note any services or spaces where **no one** really owns the outcome.

SECTION SIX

Prioritized Change List

Goal: Turn all of the above into a short, realistic action list.

DETERMINE YOUR PRIORITIES

Reference your *Top 5 “System Problems”* in Section Four (page 14); choose up to 3 of your problems to set as priorities for the next 3-6 months.

Complete the tables below for your top 3 priorities.

Examples:

- **Why this matters:** who it affects, how often, how visible
- **Likely root cause:** coverage, standard, training, timing, equipment, etc.
- **What might require changes:** in vendors, contracts, or Facility Systems ownership

PRIORITY #1	
WHY THIS MATTERS	
LIKELY ROOT CAUSE	
MIGHT REQUIRE CHANGES	

PRIORITY #2	
WHY THIS MATTERS	
LIKELY ROOT CAUSE	
MIGHT REQUIRE CHANGES	

PRIORITY #3	
WHY THIS MATTERS	
LIKELY ROOT CAUSE	
MIGHT REQUIRE CHANGES	

QUICK-WIN VS. DEEPER CHANGE

For each of your *Top 3 Priorities*, list 1-3 quick wins and one deep change that you can focus on achieving.

Quick Win (0-90 days): Small adjustments that will reduce noise quickly.

Deeper Change (3-12 months): System changes that will take more planning or partnership.

PRIORITY #1	
QUICK WINS	
DEEPER CHANGE	

PRIORITY #2	
QUICK WINS	
DEEPER CHANGE	

PRIORITY #3	
QUICK WINS	
DEEPER CHANGE	

SECTION SEVEN

Conversation Notes

Goal: Capture thoughts for leadership/vendor conversations.

QUESTION + ANSWER

Complete the following questions to help prepare your key points for future conversations.

Complete the below prompts for each of your *Top 3 Priorities* in Section Six; answer as if you are explaining your priorities to leadership.

How would you frame **PRIORITY #1** in terms of:

Risk _____ (safety, compliance, reputation)

Impact on people _____ (employees, patients, residents, students, staff, tenants, visitors)

Impact on your time and focus _____

How would you frame **PRIORITY #2** in terms of:

Risk _____ (safety, compliance, reputation)

Impact on people _____ (employees, patients, residents, students, staff, tenants, visitors)

Impact on your time and focus _____

How would you frame **PRIORITY #3** in terms of:

Risk _____ (safety, compliance, reputation)

Impact on people _____ (employees, patients, residents, students, staff, tenants, visitors)

Impact on your time and focus _____

For each of the following prompts, consider what questions you would have when discussing the topic with a **partner who claims they can help**; write your questions below.

About their approach _____

About their staffing _____ *(W-2 vs. subcontractors, training, background checks)*

About how they design and manage Facility Systems _____
(janitorial, floor care, exterior & grounds, construction cleaning & space readiness, disinfection & emergency response, critical environment cleaning)

About how they would tailor those systems to Facilities Like Yours _____
(corporate, medical, industrial, government, higher ed, K-12, controlled environments)

Any additional notes / next steps _____