

Solving the Data Overload Dilemma:

*A Startup Guide &
Workbook for Building Your
Digital Executive Playbook*



In our recent blog, ***Why Data is Your Greatest Asset***, we explored why so much facility and operations data goes unused and how executives need a new approach to transform information into business outcomes. This Startup Guide and Workbook is your practical next step.

Facility leaders know the pain points well:

- + Doing more with less — teams stretched thin and constantly firefighting instead of planning.
- + Valuable time lost chasing reports across disconnected systems.
- + Budgets squeezed, with deferred maintenance creating bigger liabilities later.
- + Leadership demanding proof of ROI, while most KPIs fail to resonate with the C-suite.

This workbook is designed to help you **move from awareness to action**.

The value of this guide is in its simplicity: you don't need to overhaul every system at once. **Start small, show impact quickly, and build credibility** with metrics that resonate across Facilities, IT, Finance, HR, and Real Estate.

Using the Insight-to-Impact Cycle as a framework, our guide walks you through a simple, five-step process:

- 1. Choose your priority domain(s)** — Space, Energy, Safety, or Asset Management.
- 2. Map your data path** — identify systems, owners, refresh cycles, and stewardship.
- 3. Create a KPI charter** — define what matters, how it's measured, and who owns it.
- 4. Automate dashboards and alerts** — make performance visible to decision-makers.
- 5. Pilot your approach in 90 days** — prove results, refine, and expand.

This isn't about collecting more data — it's about **establishing a repeatable and scalable process** that aligns your teams, accelerates decision-making, and demonstrates the measurable value of integrating facility data silos across your organization.

The workbook that follows is your template for action, helping you move from **“we have data”** to **“we deliver results.”**



Step 1: Choose Your Priority Domain

Not all data is created equal.

Focus where you can deliver **the biggest, most immediate value**. Consider starting with one or two of the four facility management domains that consistently drive the majority of costs, risks, and performance outcomes:

- + **Space Management:** Are you paying for underutilized square footage, or struggling to optimize space in a hybrid workplace?
- + **Energy Management:** With energy often the second-highest controllable cost, where are the inefficiencies in your portfolio?
- + **Safety Management:** Are incidents, compliance risks, or “near misses” driving unexpected costs?
- + **Enterprise Asset Management (EAM):** Do deferred maintenance and aging assets threaten uptime, budgets, or customer satisfaction?

Step 2: Map the Data Path

Data frequently lives in silos. Mapping your data path forces clarity on ownership, refresh cadence, and how the data supports the mission:

- + Where does the data live (system of record)?
- + Who owns it (Facilities, IT, Finance, HR, Real Estate)?
- + How often is it updated (real-time, monthly, annually)?
- + How does this data support the organization's mission?
- + Who is the data steward and what data quality checks are in place (completeness, accuracy, timeliness)?

Step 2 Prompt: (repeat for each priority domain)

Domain: _____

System of Record: _____

Owner(s): _____

Refresh Cycle: _____

Steward / Data Quality Checks: _____

Gaps / Risks in this data: _____



Step 3: Define Your KPI Charter

Executives don't need more dashboards — they need a small set of high-value KPIs they can act on. Build a KPI charter that is aligned to strategy, measurable, and owned:

- + Key Performance Indicator (KPI) Name
- + Calculation Logic (how it's measured)
- + Target / Threshold (what success looks like)
- + Trigger Actions (what happens when performance slips)
- + Executive Sponsor (leadership owner)
- + Reporting Cadence & Audience (monthly ops; quarterly exec review)

Step 3 Template:

KPI Name
Calculation
Target / Threshold
Trigger Action(s)
Executive Sponsor
Cadence / Audience

Examples: Work Order SLA Compliance, Preventive Maintenance Compliance, Mean Time to Repair (MTTR), Energy Use Intensity (EUI), Facility Condition Index (FCI), Incident Rate, etc.

Step 4: Automate & Visualize to Eliminate Data Overload

A common frustration isn't a lack of data — it's too much of the wrong data.

Work orders, meter readings, spreadsheets, vendor logs, and inspection forms live in different formats, owned by different departments, and updated on different schedules. The result is “analysis paralysis.”

Leaders receive hundreds of pages of reports, but cannot easily answer simple questions:

- + Which assets are costing us the most?
- + Where are we wasting the most energy?
- + How many incidents are trending up versus down?
- + Which vendors are under performing?

This is **data overload** — information spread across silos, presented without context, and hard to act on.

The solution is to **automate and visualize**. Link systems of record into a common dashboard and set alerts when thresholds are crossed. Replace 20 spreadsheets with one view of red / yellow / green indicators tied to the KPIs that matter most. Establish access controls and a simple RACI (Responsible, Accountable, Consulted, Informed) so people know who does what when an alert fires.

Step 4 Prompts:

- + Where are you experiencing data overload (e.g., energy reports, work orders, compliance logs)?
- + Which reports can be consolidated into a dashboard?
- + What alerts would help you act quickly (e.g., FCI > 10%, EUI spike, backlog exceeds threshold)?
- + What dashboards/tools do you already use (Power BI, Tableau, CMMS, IWMS), and who can help set them up?
- + Who needs access to see results, and what is the RACI for response?

Step 5: Pilot for 90 Days

As Howard Shotz emphasized, proving value quickly is critical.

Run a 90-day pilot in one or two domains. Use it to test your KPI(s), refine the data path, and generate early wins to share with executives. Select and train a cross-functional team of early adopters to champion the scale-up.

Checklist:

- Domain selected
- KPI charter created
- Dashboard / alerts linked
- RACI and governance cadence defined
- Leadership review scheduled
- Early wins documented

Your Next Steps

By working through this guide, you now have:

- + A priority domain aligned to your most pressing challenges.
- + A mapped data path that identifies systems, owners, refresh cycles, and stewardship.
- + A KPI charter that defines success, accountability, and cadence.
- + An automation plan so leaders act on insights, not noise.
- + A 90-day pilot framework to prove value quickly and build momentum.

Next, use pilot results to expand across additional domains — Space, Energy, Safety, and Enterprise Asset Management — while aligning with recognized frameworks (e.g., ISO 55000, 41001).

Each success builds credibility, reduces costs, mitigates risks, and demonstrates that Facilities is a driver of business performance, not just a cost center.

Maintain a simple change log and version control for this playbook so your organization can update it as processes improve.

*Stay tuned for the next blog in our **Digital Executive Playbook series**, where we'll share emerging insights and strategies shaping the future of facility leadership.*

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