# Turning Raw Inspection & Work Order Data into Operational Signals Signals

# Today's Agenda

## First Half: Framework & Strategy

- The core problem: turning raw data into actionable signals
- Raw Metrics vs. Operational Signals
- Step 1: Establish a Baseline Using Otuvy
- Step 2: Define If/Then Triggers
- Step 3: Add Operational Context
- Proactive Client Communication
- Manual Monitoring vs. Automation

## Second Half: Live Demo in Otuvy QM

- We will log in to Otuvy QM live to showcase the premium functionalities of our Operational Intelligence dashboards.
- See everything presented today applied in real-time.
- Explore how Operational Intelligence Platinum features can work for your team.
- Share how you can connect with our team to either add this functionality on or further customize dashboards in your current Otuvy QM account

# The Core Problem

As an Otuvy customer, you already have inspection scores, work order data, completion times, completion times, and trends flowing in every day.

**The issue is not access to data.**

You have everything you need already flowing into Otuvy if you are using the modules consistently.

**The real issue is knowing exactly when that data requires action.**

Data without a trigger is just noise.

# Raw Metrics vs Operational Signals

### Raw Metric You Manually Notice

"Our inspection score dropped?!"

### Operational Signal

"Our inspection score dropped below our defined threshold, which triggers triggers retraining within 72 hours."

There is a difference between reviewing data and using it as a signal.

**A signal requires three things:**

### A Metric

The data point you are tracking

### A Threshold

The defined level that triggers action

### A Predefined Action

The response that is already decided

Without all three, it is just reporting.

# Step 1: Establish a Baseline Using Otuvy

Use **8–12 weeks of historical data** to define normal performance.

## Example data sources in Otuvy

- Inspection scores & deficiencies
- Work order response time
- Work order completion time
- Work order frequency

## Example: Inspection Scores

1. Go to the Inspections dashboard
2. Filter by location
3. Pull the last 8–12 weeks of scores
4. Identify your average and normal fluctuation range

92%

Average Score

Your defined performance baseline

90–94%

Normal Range

Expected fluctuation band

**Now you have defined your baseline.**

# What Happens Without a Baseline

### Every fluctuation feels urgent

No context means no calm — everything
everything looks like a crisis.

### Teams react to noise

Energy is spent on false alarms instead
instead of real issues.

### Small issues get missed

Without a reference point, gradual decline goes unnoticed.

Baselines remove emotion from decision making.

**You cannot define abnormal until you define normal.**

# Step 2: Define If / Then Triggers

Attach action to your metrics.

### Inspection Score Trigger

If inspection score drops below **89%** for two consecutive weeks → Supervisor review and retraining within **72 hours**

### Work Order Aging Trigger

If more than **15%** of work orders exceed **48 hours** → Escalate to regional manager

The key is **deciding the response before performance shifts.**

You are using Otuvy as the measurement source.

You are simply defining what threshold creates action.

### Speed comes from pre-decision.

When the threshold is crossed, the response is already known.

# Step 3: Add Operational Context

**Signals trigger investigation, not panic.**

## Inspection Comments

Review inspection comments in Otuvy. Look at which categories dropped.

## Work Order Volume

Check if work order volume spiked during the same period.

## Staffing Changes

Account for any staffing changes that may have affected performance.

## Local Events

Confirm with the site manager before escalating. Context matters.

# Proactive Client Communication

Operational signals allow you to **lead the conversation.**

Instead of explaining performance drops after the fact, you can communicate early.

> "We noticed a shift two weeks ago, here is what caused it, and here is what we have already done."

## Clients expect visibility.

Transparency builds trust and strengthens the relationship.

## Signals help you control the narrative.

You are no longer reacting — you are leading.

# The Manual Monitoring Reality

Manual monitoring requires someone to:

01

Review inspection trends

02

Check work order completion and response times

03

Compare against baselines

04

Escalate when thresholds are crossed

With five locations

This is manageable.

With twenty+ locations

Consistency becomes the challenge.

The framework shared today works manually. **Growth is where friction begins, but also where automation WINS.**

# Automating the Framework with Operational Intelligence Platinum

**Same framework. Same data.**

Custom Dashboards

KPI Alerts

4-Hour Data Refresh

Continuous Monitoring and Scheduled Sharing

The strategy does not change. The data still comes from Otuvy inspections and work orders.

**What changes is how the signals are monitored.** Automation reduces lag and removes manual oversight.

# How to Start Today

You can start this process today using the data already in Otuvy.

Choose your top 3 operational metrics

Review 8–12 weeks of data

Define your "normal" range

Create **If / Then** triggers

Standardize responses

If you want to remove the manual monitoring friction and shorten response time, that is where **automation becomes powerful.**

# We're Here to Help

If you are interested in **Operational Intelligence Platinum** or want to explore how you can make better use of your operational data, we would be happy to connect.

Your Account Manager, Kyle, can walk through an **Account Strategy Session** focused on your focused on your operation and goals.

To get started or gain further guidance from our customer success team, email **vip@otuvy.com** and we will coordinate the conversation with you from there!