



CASE STUDY

BNY Mellon

Client:

BNY Mellon

Project:

To implement a comprehensive FM software solution to manage reactive and planned maintenance, integrated with a centralized system to manage the booking of shared rooms across a network of UK offices.

Objectives:

To reduce administrative load on the internal helpdesk, eliminate resource allocation issues and deliver a web-enabled room booking solution.

Results:

Improved administration of maintenance management and increased meeting room utilization, delivering cost savings and improved efficiency.

Supporting a Global Financial Leader

BNY Mellon is a global financial services company with locations in 34 countries, across 6 continents. Voted the Safest Bank in the U.S. (Global Finance 'The World's Safest Banks,' 2009), the company provides a range of asset and wealth management services to blue chip and private clients across the globe. Within the UK and Ireland alone, BNY Mellon currently employs approximately 8,000 staff.

As a leading financial institution, BNY Mellon required an efficient and flexible FM system to manage planned and reactive maintenance across their growing UK operation. BNY Mellon's Facilities Department had previously been using a series of spreadsheets and access databases to manage and control maintenance, but as their operations grew a more powerful system was needed which could expand in line with the business. In 2001, the bank began a system selection process to obtain a suitable replacement.

Chris King, Facilities Manager at BNY Mellon explains:

“During the selection process, we looked at a number of FM systems and undertook site visits for those shortlisted. We spoke to several of Service Works’ existing clients, large financial institutions similar to BNY Mellon and were impressed with the benefits that QFM could offer an organization of our size. We quickly made the decision to use QFM, and following a smooth system implementation we were soon up and running with the system.”

“We have found QFM to be the most powerful integrated FM and Bookings solution available on the market.”

“With the move to our new UK headquarters, we took the opportunity to review and streamline our business processes. All meeting rooms had previously been booked via our facilities helpdesk, which was a considerable administrative load. We wanted to ensure that the new building was run as efficiently as possible, by providing a centralized Web facility for staff to book meeting rooms and associated services. That is when we looked at expanding our use of QFM to take advantage of the QFM Room Bookings Web application.”

Since 2001, QFM has been used by BNY Mellon’s London-based facilities helpdesk to successfully log and manage reactive maintenance requests received from the bank’s UK & Ireland offices. Jobs are reported to the helpdesk via telephone or email, details of which are then entered into QFM, prioritized and assigned to the most appropriate contractor. BNY Mellon’s team of in-house and outsourced contractors have “contractor level” access to the QFM system, enabling them to update details of current jobs from notification through to completion. The system is also used to manage planned preventative maintenance across BNY Mellon’s Southern portfolio of 9 offices.

The requirement was a complex one. BNY Mellon has 8,000 employees and 20 offices in the UK alone. Within those offices there are around 250 different rooms, ranging from client meeting rooms through to dining rooms, all of which can be



➤ Advanced Technology for a Modern Workplace

In 2004, BNY Mellon relocated to their current UK headquarters located at 160 Queen Victoria Street in Blackfriars, London. Covering 350,000 square feet, this high profile office is the flagship for BNY Mellon’s UK operations, welcoming thousands of visitors each year and acting as a base for a large proportion of the bank’s UK workforce. By its very nature, the building contains a significant number of meeting and conference rooms. It is the responsibility of BNY Mellon’s Facilities Department to ensure that shared spaces are used to their full potential and eliminate possible problems such as double booked rooms. According to Chris King:

booked by staff. Each room had to be assigned a “permission level” to ensure that it could only be booked by the appropriate level of employee. In addition, BNY Mellon wanted to impose departmental and geographic restrictions to certain facilities.



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Chris King says: “The scope of our needs made for a rather intricate room booking process. We needed a system that was flexible enough to cope with these demands.”

QFM Room Bookings was implemented in 2004, in parallel with a major upgrade of BNY Mellon’s existing QFM system. As part of the upgrade, BNY Mellon moved to the web-based QFM application, making the system securely accessible to all European staff, irrespective of their location. All rooms within BNY Mellon’s offices across England are now booked exclusively via QFM. Meeting rooms have been configured to conform to one of four differing permission levels, enabling BNY Mellon to flexibly restrict which staff can book shared meeting resources. Configurable layouts can be defined in the system, for example, BNY Mellon’s board room has 9 possible layouts.

In addition, refreshments and catering are booked via QFM, ranging from sandwiches to fine dining. Catering staff have access to the system to allow them to manage catering requests. QFM also offers staff the ability to book AV equipment and other IT services required for meetings.

BNY Mellon has taken advantage of QFM’s system configuration capabilities, enabling them to apply the bank’s corporate branding throughout the system. They have built custom QFM reports specific to their business needs. They continue to collaborate with Service Works on the development of custom functionality. They also take advantage of QFM’s reporting facilities to manage cross charging for catering and other services relating to room bookings.

Looking Ahead

Moving forward, BNY Mellon has further plans to expand their use of the QFM system. QFM Room Bookings, already used to book rooms in all offices in England, is scheduled to be expanded to include facilities in Scotland and Ireland. Planned Preventative Maintenance schedules (PPMs) for both hard and soft services within the Southern region are already managed on QFM. Following success in this area, there are plans to roll out the system to manage PPMs across the whole of the UK portfolio in the next 12-18 months.

Chris King concludes: “The QFM system has been configured to meet our exact requirements. It has brought consistency to the room booking process across our sites and enabled us to streamline our facilities operations. QFM has eliminated problems of the past such as double booked rooms and enabled us to improve our levels of customer service.”

“We have found QFM to be the most powerful integrated FM and Bookings solution available on the market. The system is very comprehensive and flexible enough to cope with the complex demands of an expanding organization. Over the past few years, our London operation has doubled in size, and QFM has been able to support that growth. We continue to receive a good level of service from Service Works and look forward to continuing our successful partnership as we extend our usage of QFM.”



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