

# Software systems are go

Buying an FM software system is usually a major investment decision which the facilities manager needs to justify to the board. But how does a facilities professional choose from the range of software on offer to suit their business? **Jackie Bennett Shaw** cuts through the jargon and explains how to choose software, prepare a business case and implement the technology

**F**acilities managers agree that, when you get it right, software systems can have a massively positive impact on the coordination and delivery of FM services. Last year, in the annual UK Computer Aided Facilities Management (CAFM) survey carried out by FMA, i-FM.net and Service Works Group, 81 per cent of the 450 public, private and non-profit facilities professionals who took part in a survey reported that CAFM had enabled them to save money and 91 per cent confirmed that CAFM had made their FM service more efficient.

But software systems don't come cheap and, with more than 200 vendors in the FM software landscape, this market can be difficult to navigate. The market is awash with acronyms from CAFM to a plethora of other different terms which describe similar software functionality, including computerised maintenance management software (CMMS), enterprise asset management (EAM), and integrated workplace management systems (IWMS). Even when you fully understand what the terms mean, this may not detract from the sense of bewilderment.

*The BIFM Good Practice Guide to Selecting FM Software*, written by Annie Gales, director for Service Works Group, begins with a very clear message - 'FM software is not a quick fix to a poorly-managed or fundamentally-unsound management system. It is a tool to aid operational efficiency, generate quality improvement and assist in compliance. Therefore, you must be aware that you will need to have your organisation's business processes well defined in advance of any installation of FM software.'

The guide suggests that FM processes are typically based around three fundamental business needs: accurately capturing, monitoring and reporting on FM assets and services in a timely fashion to track and manage performance, costs and control quality; communicating information and data to the necessary in-house and external contractors, managers and stakeholders; and managing risk and compliance with health and safety legislation. It is fundamental, therefore, to consider exactly what you need a system to deliver and exactly how it will be used before you make any decision on which CAFM solution is right for your business.

System vendors are also keen to encourage a joined-up approach to CAFM, aligning software capability with the business requirement and making it proactive, to achieve optimum results. Sales director for Qube Global Steven Jones comments: "You have to be clear about your needs and what you want to achieve. Think about the problems you are experiencing in your business - what is causing you 'pain' and how can a CAFM system help with this? Get high level input to identify whether your required specification is narrow or across the entire FM function. There's no point creating a 'wish list' - understand what's imperative and what's not and tailor this against your budgets." Meanwhile FSI sales manager Jon Clark believes CAFM's impact on process should be extended to use as a strategic business tool: "Don't try and throw technology at a problem that you don't fully understand - you need a clear and concise understanding of what it is that you want the software to do. Once this is defined, your requirement flows down and your short to medium-term needs should be aligned to long-term strategic goals."

The BIFM lists the key benefits of having documented business processes and controls to support the day-to-day operation as:



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rapid, and often real-time, processing of information; improved effectiveness, efficiency and control; accurate reporting; removal of process or data duplication; and full accountability and auditability. But, as with any major investment, convincing the finance director of these potential benefits - and to part with the cash - may not be an easy task, especially when the economic climate is tough.

Service Works' director Mark Kirkham explains: "You've got to have a clear vision on how this is going to be delivered operationally and financially - the two can't be divorced. It's no good trying to demonstrate that a system will help to 'make the garden rosy' if you can't translate this into return on investment and something that the FD is going to understand."

Help is on hand, however, and there are a number of resources available to help FMs to prepare a realistic financial case for investing in a software solution. Service Works has an ROI Calculator available on its website which assists in identifying and measuring the benefits that can be secured from an FM software investment and in securing budget approval and sign off. BIFM's *Selecting FM Software Guide* contains a table designed to help to prepare a realistic financial case, capturing all costs and savings in order to determine whether the investment is justified. The guide recommends looking over a three or four year period to gain a true picture of the actual costs and savings of implementing a new system and warns that cutting corners and costs in year one may lead to dramatically higher costs of ownership over the long term.

With a clear understanding of the process you want to achieve and the benefits sold with an agreement in principle on resource, the next step is finding a suitable CAFM service provider with whom to work. CAFM systems come in a whole host of modes, including hosted, modular, mobile, web and cloud based, but there is general agreement that a combination of online research - the key UK suppliers are on page one of search engines - together with research on other organisations' experience are the best way to narrow down your choice.

Service Works' Kirkham says: "Now you know what you want and have a budget, you've got to communicate this to potential suppliers and get a feel for what their different systems can offer. Get them to give a demonstration and look for validation and references. Look at a procurement model that's right for you: you may want to manage the project or implement the system yourself or you may not want to own the system." FSI's Clark adds: "It's as much about the company and development capability as the software. Do your homework before pushing your requirement out to select companies: then invite them to help you solve your problems. Find out what's out there and what works - what's really delivered and solved problems." See what's in the marketplace and get references.

Neil Harrison, CEO of Ostara Systems, recommends asking for a list of the software provider's clients and choosing businesses of different sizes and backgrounds with whom to speak.

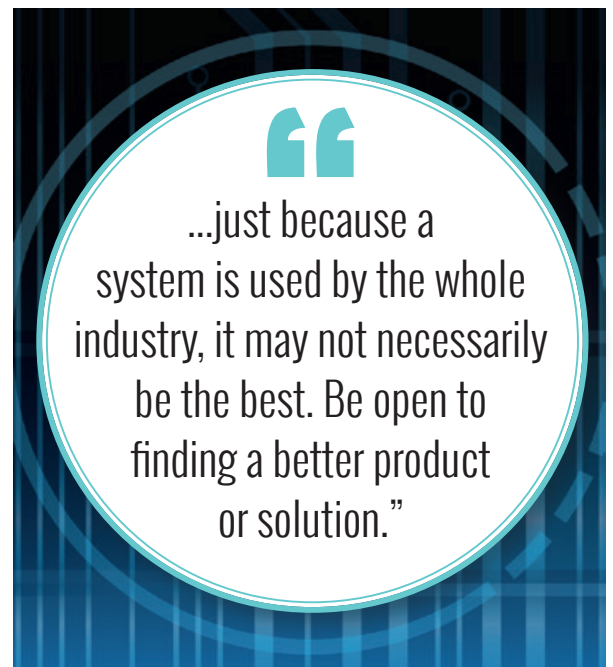




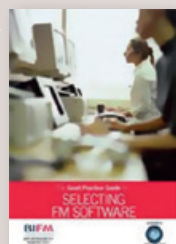
“You may find comfort in choosing a reference from a similar size and sector but it’s important to remember that, just because a system is used by the whole industry, it may not necessarily be the best. Be open to finding a better product or solution.” He also champions flexibility throughout the process: “You may go to a supplier saying, our process is ‘X’ and we want your system to achieve ‘X’ too. But if their system can do ‘X’ but also allows you to do ‘Y’ and they can show from experience that ‘Y’ gets better results, it may be better to adapt to a predetermined process which has been proven to work.”

Finding a synergy with your CAFM vendor is high on the list of priorities too. “Choose someone who can offer relevant advice and not just take your literal requirements. Once the system is live you’ll want support to manage you through the process from a ‘partner’ rather than a supplier, so move away from the client/supplier relationship to a partnership through which you can achieve your goals.” Neil Harrison from Ostara Systems concurs: “Find a solution which is compatible with your business’ DNA and that will promote open, honest, accurate and timely collaboration between all parties with appropriate control mechanisms. Choose to work with people you like and trust, look for skills that are compatible with your own and be sure you can talk openly.”

The last crucial step in ensuring the timely delivery of the new software solution meets the needs of your business and delivers a rapid return on your investment is the development of an effective and realistic implementation plan. Taking an active role in the development of the software vendor’s implementation plan and then managing the project against agreed milestones is the best way to ensure that your software is delivered on time and on budget. A formal project plan must be agreed with all stakeholders to enable resource demands to be met and clearly defined project milestones to be achieved. A project ‘champion’ should be selected to take ownership of the project and drive it forward. Adequate focus should also be placed on training requirements for both the system users and administrators to ensure the success of your new system and buy-in must be achieved from all likely delegates to ensure they will be committed to the success of the new solution. **FMJ**



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**FURTHER INFORMATION**

Download a copy of the BIFM Good Practice Guide to Selecting FM Software at [www.bifm.org.uk/bifm/knowledge/resources/goodpracticeguides](http://www.bifm.org.uk/bifm/knowledge/resources/goodpracticeguides)

