

Quick Guide to Buying FM Software





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EXECUTIVE SUMMARY

As you look at the potential of implementing a new FM software system, you may find yourself faced with a myriad of time-consuming challenges as part of the planning, purchasing and implementation process. You may be required to provide return on investment, justify the business benefits (to secure internal budgetary approval), and ultimately be responsible for managing the project. This **Quick Guide** is designed to demystify the project and break it down into manageable elements that can easily be understood, in order to simplify the entire process.

If you require more in-depth information about any stage of the purchasing cycle, please request our detailed series of complimentary FM software planning tools, by emailing info@swg.com.

ASSESSING THE FEASIBILITY OF FM SOFTWARE

Any FM software project should begin with a feasibility study. This not only makes sure that the organisation is ready to invest in such a system before too much time is invested, but also will help to filter through the abundance of FM software vendors to ensure that a solution is chosen that **meets the organisation's core requirements and delivers return on investment (ROI)**.

Key objectives could include:

- improving asset management to provide a safer working environment and ensure compliance
- increasing operational efficiency
- reducing carbon footprint and environmental impact
- obtaining intelligent business information to inform effective strategic decision making

It is fundamental to consider exactly **what you need a system to deliver** and exactly **how it will be used** before embarking on the project. For example:

- is self-service relevant to your organisation?
- does the system need to cover reactive and planned maintenance?
- how important is staff scheduling?
- are mobile devices needed to speed up job resolution and record staff time?
- should the solution be available for external contractors to complete work orders?

Factors such as current and projected scale of business, workload volumes, and the efficiency and success levels at which the business is being managed should be considered and presented in an initial feasibility assessment. It is also important to consider the level of in-house experience of implementing such systems. If the answer is that experience is limited, then **it is important to consider what the supplier can offer you to help ensure that the implementation is a complete success**. These factors will vary in each organisation, and a detailed and wide-ranging approach is necessary.



Ensure you have relevant internal champions for the project who have the capacity and desire to sign off a purchase

CONSIDERATIONS AND COMPARISONS

When considering the purchase of a new FM system, it is worth setting clear and measurable criteria against which fair comparisons and informed decisions can be made. This can include:

Business planning:

- What is the estimated cost of FM software that will provide the required functionality that is needed (including any future requirements)?
- What other additional costs should be considered (i.e. software, hardware, data importing, project management, implementation, consultancy, training, maintenance)?
- What is the payback period for an investment in FM software and is the period acceptable?
- If the payback period is acceptable, is there a budget for new software?
- Would the organisation prefer to buy or rent the application? Each option has very different financial implications.
- Is the new FM system going to be self-contained within the facilities department or will other areas of the organisation need to link into the application in order to share data and reporting facilities (e.g. finance, human resources or an existing ERP system)?

IT requirements:

- Does the IT department need to be involved in, or sign off, the purchase of the new FM software? If so, it is advisable that they participate early in the decision-making process to ensure the project gains their acceptance.
- Will the new application be hosted in-house or will it be cloud-based?
- How many user licences will be needed, and what level of access will be required (i.e. read-only, read and write, administrative rights etc.)?
- Will any of your users require mobile or remote access and, if so, what functionality will they require?
- From a hardware and a software perspective (product functionality, number of users, technology offering), how much growth and scalability will be required from the system over the next three to five years and will the chosen application offer the necessary scalability?
- How well will the system integrate with other applications and does the database technology use standard formats to facilitate the integration of other applications?

CONSIDERATIONS AND COMPARISONS (CONTINUED)

Working practices:

- Will existing processes need to be reviewed prior to system implementation? For example:
 - existing FM practices
 - maintenance plans
 - workflow and processes
 - current relevant legislation
 If so, it is imperative to fully understand what potential changes will have to be accommodated by the new software.
- If existing working practices are kept, does the new system provide the necessary flexibility for existing workflows and terminology to be retained?

Product output:

- Review your current reporting system. Can this be improved upon and will additional reports be required? Can reporting be automated?

Considerations for service providers:

- For an outsourced service or service provider the issues can be more complex, as the objective is not only about operational efficiency but also about delivering excellent customer service to outshine the competition and deliver a real competitive advantage to clients.
- Discuss the requirements and expectation of how a system can support this with two or three shortlisted FM software suppliers. Initial supplier discussions can be supplemented with online information, software demonstrations, case studies and reference site visits.

Delivery models and pricing:

- It is important to consider that software systems can be purchased as a capital cost or alternatively as an operating cost charged annually by the supplier.
- The proposal for FM software should include a short and long-term forecast that gives the business confidence in the outlay for the project, i.e. - that if £X is invested, £Y benefits per year are expected to be generated. It is also important to outline the expected payback period for the software and any related expenditure.



To review where facility cost savings can be made and the investment's payback period, request Service Works' complimentary ROI Calculator by emailing info@swg.com

BUILDING A BUSINESS CASE

Implementing software to optimise the operation of the facilities or estates management department makes sound operational and financial sense. However, as with any major investment, there is often a requirement to prepare a business case in order to demonstrate the benefits and provide financial justification in order to secure funding approval.

When **writing your case**, it's important to structure the information clearly and bear the following in mind:

- Make your points interesting, objective, salient and succinct
- Avoid technical and FM jargon where possible
- Try to anticipate what resistance there might be to the business case and ensure these points are addressed in your document
- When you have selected your preferred supplier, ask if they can provide you with supporting information for your business case
- Incorporate on-going operating costs into the plan (i.e. software maintenance)
- Ensure that the project benefits and cost savings are clearly summarised and return on investment is clearly demonstrated
- Understand timings for budget planning so your case is presented before purchasing decisions are made

Below is an example structure for a business case:

Section 1 – Project Introduction

Executive summary
About the FM department
Business objectives

Section 2 – The Project

Project outline
Outline of FM software and its benefits
Impact of no action
Recommended solution

Section 3 – Financial and Conclusion

Costs
Assumptions and scope
Return on Investment (ROI)
Timescales and conclusion



The Executive Summary is the most important section of the business case and it is recommended that you write it last, once you have shaped the rest of the document

Service Works Global has also created a template in Microsoft Word format, containing salient commercial information, which can be edited and adapted as required.

Contact info@swg.com to request a copy of the template.

MAKING THE TRANSITION

Once the decision has been made to implement FM software, it is crucial to **develop and agree a formal project plan with all stakeholders** to enable resource demands to be met and clearly-defined project milestones to be achieved.

Typically, the implementation constraints with any FM software project are **timescale, resource availability and scope of requirement**. These are the critical inputs that must be managed in order to achieve the desired output, including an assessment of the supplier's go-live lead times based on the estimated size of the implementation, along with their project plans.

A new FM software system will best deliver if there is a strong communications programme. There should be a **project champion** who will drive the benefits through the organisation, establishing the system as a strategic business tool, and not just a simple administrative resource. It is important to identify a multi-disciplinary project team who are allocated the time to:

- Collect, validate, transfer and clean up the required data to populate the software system. This can either be carried out in-house or by the vendor. Whatever the method, the vendor must give proactive support as accurate, quality data is crucial to the success of the project
- Run the pre-installation checks and set up all required software licences and users
- Manage data migration and any software interfaces that may be required
- Undertake system testing, commissioning and sign-off/acceptance
- Train system users and administrators
- Go live with FM software



Consider the operational value of any supplementary data held on Excel™ spreadsheets. If it doesn't make a vital contribution, it should be archived to keep the new systems streamlined

On the launch day, the vendor must be prepared to make their project manager, trainer, or someone who has been closely linked with the whole process, fully available as an essential safety net. And, after project sign off, a system health-check should be agreed and in place with the vendor for milestone reviews of the project e.g. one month, six months, twelve months.



IMPLEMENTATION PLAN

Project Plan

The project plan is the basis for any structured and well managed system implementation. The following tasks will allow specific project measures to be defined:

- Clearly define purpose and scope.
- Establish project timescales and resource availability.
- Define system priorities (e.g. improving customer service, tighter financial control, cost savings, efficiency, ensuring compliance).
- Review current business processes. (Prepare an analysis of current procedures and processes, review, fine-tune and decide on the requirement for new).
- Define and document milestones and project tasks.
- Communicate rationale and benefits to user community.

FM Software Review

When the areas above have been actioned, it should be possible to address the following points in order to select the most appropriate FM software solution to suit your requirements and budget:

- Review FM software solutions available.
- Arrange system demonstrations and reference site visits.
- Obtain and review the Service Level Agreement from the software provider.
- Ascertain the FM software provider's upgrade programme and costs. Can they upgrade outside of office hours if required?
- Involve users in selection process.
- Select system that best meets requirements. Check the pricing proposal includes future running costs. i.e. support, maintenance and training, verify if new hardware (e.g. mobile devices) is included in the cost.
- Obtain the provider's product development roadmap.

Define the Project Team

The assembly of a multi-skilled project team is an important task.

- Define roles including senior project sponsor and project manager (to take ownership).
- Obtain time commitment from project team members.
- Ensure team members hold decision-making authority.
- Establish communication channels with user community.

SYSTEM DESIGN

System Planning

There are a number of areas to review relating to data structure, archiving and reporting. The FM software provider should also be proactive in providing advice and assistance.

- Establish whether data migration from a legacy system is required. (Is the data correct, does it need to be cleansed, can the software provider import it)?
- Does additional data need to be validated and collected?
- Define the standards for data terminology, establish data structures and hierarchies.

System Planning (continued)

- Ensure system allows basic customisation.
- Obtain requirements and deliverables document from FM software supplier.
- Identify any additional functionality required above standard product offering and define bespoke functionality.
- Define reporting requirements, security levels (i.e. view only, edit, administrator) and access methods (web, mobile etc.)

Infrastructure Planning

A review of hardware and infrastructure requirements should be undertaken at a stage where you have ample time to order and install new equipment, if required.

- Review/upgrade hardware. (The FM software provider should supply a specification for hardware, operating system and network requirements).
- Ensure internal IT processes can support the new system. (i.e. are adequate backup procedures in place?).
- Define any software interface requirements.
- Understand the procedure that needs to be adhered to for software upgrades.

ROLL OUT**Testing, Training & Communication**

Appropriate attention should be given to the tasks required in the final stages prior to the FM system going live. Success will be initially judged on the use made of the system and the ease of transition.

- Create user acceptance test plan and arrange testing resources.
- Arrange compatibility testing if required.
- Identify training requirements and agree with provider a suitable programme.
- Create an additional data set for testing and training.
- Communicate benefits to user community to gain acceptance.

Go-live

The actual switch to live operation should be carefully planned and take into account the following factors:

- Define approach - phased roll-out or all at once. If phased, establish the implementation phases.
- Consider a trial run before publicising the new system.
- Decide whether to run the legacy system in parallel with the new system for an initial period.
- Ensure on-site support is available from the FM software supplier on go-live day.

POST IMPLEMENTATION**Post Implementation Review**

Once the initial development and implementation is complete, it is important to receive excellent support from your FM software provider. A plan should be formulated for the management of the supplier.

- Establish whether the FM software supplier provides a review service to evaluate performance prior to implementation.
- Define the level of technical support required (e.g. helpline, on-site, remote).
- Does the FM software provider operate a User Group or Special Interest Groups (SIGs)?



CONTACT US

This **Quick Guide** is intended to provide an overview and some clarity on the process for buying and implementing FM software. Should you require more in-depth information, Service Works has produced several white papers and resources including:

- **Best Practice Guide for FM Software Implementation**
- **Building a Business Case for FM Software**
- **ROI Calculator**
- **Excel to FM Software - Making the Transition**

Request any of these complimentary materials by contacting us on the details below.

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