YOUR COMPREHENSIVE GUIDE
TO *IDENTIFYING* FACILITIES MANAGEMENT SOFTWARE NEEDS

We have put together a list of actionable items (the what's and the why's) that will hopefully help you define today, so that you can easily transition to tomorrow.

Presented By:

*i*office ®

In adapting to the future workspace, all organizations must embrace and implement technology.

No alternative exists that will allow you to successfully manage a dynamic work environment and the demands of the workforce. However, in order to effectively use all the wonderful technology that is available, you must first have a firm understanding of how your business works today.

A good comprehension of how you currently make things happen in your organization ensures success in implementing new or improved processes and tools.

We know you understand your business, but can you effectively communicate all the nitty-gritty details?

A good comprehension of how you currently make things happen in your organization ensures success in implementing new or improved processes and tools. **It can, however, be quite the daunting task without a road map.**

So, based on our experience working with thousands of corporate and facility service teams, we have put together a list of actionable items (the what's and the why's) that will hopefully help you define today, so that you can easily transition to tomorrow.

Written by Elizabeth Dukes

Co-Author of Wide Open Workspace
Elizabeth Dukes has helped grow iOffice from its first customer to over 1,800 clients. Her Texas heritage has driven that success. From a family of ranchers and oil people who wore cowboy hats and boots both on the ranch and in the conference room, Elizabeth embodies her forebears' ethic for hard work and their formula for authentic living.

It is **critical to understand the business objectives** of your company and how the facility management team **impacts** these objectives.

Reporting and Measurement

We are going to begin our discussion at a somewhat high level as this will allow you to create a framework for collecting information and defining processes.

It is critical to understand the business objectives of your company and how the facility management team impacts these objectives. Some examples of common company objectives include:

- Cost-cutting, savings, and control
- Enhanced profitability or shareholder value
- Expanded Market Penetration
- People Development – creating the best work environment to attract and retain top talent

Whatever your company goals, it is highly likely that effective management of the workplace and workplace resources are contributing factors.

Although there are several, one great example is the management of real estate/ office space. Office space frequently represents a significant percentage of your organization's general and administrative expense. **So it is critical to understand what space you have, how it is utilized, and by whom.**
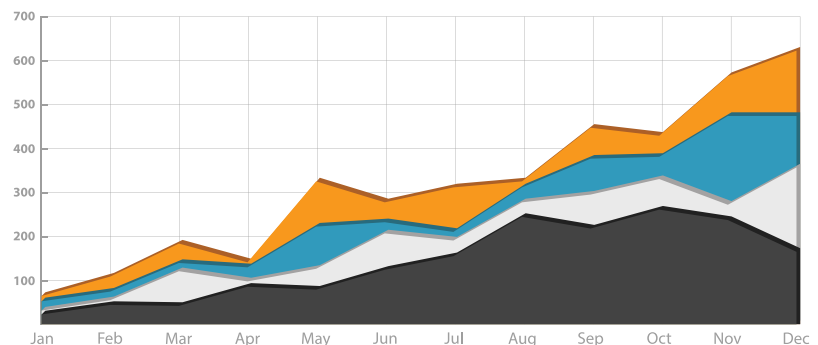
On the flip side, you must also understand whether or not you have the right type of space to satisfy workforce needs and **attract new talent**. How do you measure this? What are the key performance indicators that demonstrate the value the facility management group is providing?

For every line of service that you provide, you should consider required reports and metrics.

This will allow you to determine the data you need to collect about the space, services, and assets you manage. Key metrics **provide valuable information** regarding revenue growth (and it's major contributors), space utilization, facility costs, asset management, and employee productivity.

So now to the basic blocking and tackling...

How do you currently receive facility work **requests** from customers or employees?

Facility Management – Work Order and Preventative Maintenance Management

How do you currently receive facility work requests from Customers or Employees?

Are you using the same tool IT uses for work requests? What is the system? Remedy, ServiceNow, Jira. If no, find out what tool they are using.

- Do you receive emails?
- Phone calls?
- Shoulder tugs/whistle-blows in the hallway?

This is important because the software vendor must understand how the software can seamlessly integrate into your current environment. If your employees are already used to using one help desk application for all types of requests, then it is probably best to see how you can leverage that tool. **There are definitely differences, but solutions exist to interface IT help desk systems with facilities management software.**

On the flip side, if you operate a manual environment, it does not mean that you lack business processes. Email and phone calls are activities that constitute a process so make sure to note these activities.

How do you receive notifications for on-going scheduled tasks such as preventative maintenance or warranty compliance?

- Do you have a software tool? What is the tool? Is it the same tool used to manage on-demand service tickets?
- Does your current tool do all that you want it to do?
- Where is your information stored and how often is it monitored? If kept on a spreadsheet, who oversees the spreadsheet, ensuring data is maintained and updated regularly?
- What information do you track and capture and what insight do you gain from this data?
- Do you place the information on a calendar as a reminder?
- Do you have deadlines or due dates?
- Do you have a required set of tasks for some of your scheduled responsibilities, like warranty compliance for example?

Although preventative maintenance tasks or scheduled tasks are services that occur on a regularly scheduled basis, it does not mean that the notification of the task and tracking and fulfillment of the task needs to be any different than an on-demand request.

It is still necessary to **coordinate resources** including people and supplies, track date and time, and activity. Both can be combined into a single system, but it is important for you to define the schedule and tasks to be performed per event.

What are your next steps once a request is received?

- Is a log of requests automatically created in the software you are using?
- How do you record these requests?
- Do you have SLA's for service delivery?
- Do you set priority levels for requests? If so, what determines priority?
- Do you stick the information in the back of your head and hope you will remember to complete the request?

Regardless of your action, you still need to be able to summarize the information so that you can understand activity levels, performance, and operational costs.

If you are unable to analyze and report, then your ability to provide value and answers to your organization is dramatically inhibited. However, another consideration is how you are actually turning the data into tangible information that you can act upon.   For example, if you are manually recording requests in a log, how much time is it taking you to summarize the data into a meaningful report? **By understanding this time factor, it will support your business case to implement software.**

Your time at your wage performing these menial tasks probably does not equate to effective use of company dollars. This concept applies to all facility management related tasks.

How do you dispatch the task to the appropriate party?

This is also an area to consider and document time spent. For example, if you have a manual process, that requires a dispatcher to call, text or email operators/technicians with work order requirements, what is the lag time between receiving the request, informing the technician, and the start of the job? **Conversely, if you have a software tool in place, does it automatically assign the jobs or are they manually dispatched?** How does the technician receive the notification? Are they tied to a computer or can they receive the request via mobile device?

Most operators and technicians are out in the field most of the day. During the course of the day, they receive numerous requests and, on occasion, have the need to create their own requests. **How much time is it taking them?** 10 seconds looking at their mobile device or 10 minutes to walk back to their desk 10 times a day?

- If your service technician is an on-site operator, how do you notify them of the service request details? Do you call, text or email?
    - What information do you provide them?
    - In what format?
- If the technician is a third party vendor, how are they notified? Do you call, text, email or generate a ticket in the vendor's system?
    - What information do you give them?
    - In what format?

Why is all of this important? Because each of these activities serve your most important asset – **people**, as well as some of your most expensive assets – **space and building/office equipment**.

Therefore, a key performance indicator that may be critical to the workforce is timeliness of response.

Service Requests on your Smartphone

The facility maintenance software app gives operators and field technicians the ability to receive, update and close requests for facility requests via their smart phone device.

> ❯ watch video

For assets, it may be that preventative maintenance tasks are performed according to terms and the asset is performing a max capacity for it's full life expectancy.
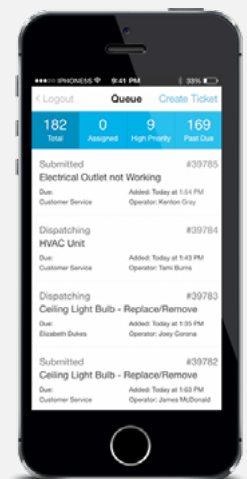
How does your team receive employee move requests?

Move and Occupant Location Management

Due to the dynamics and complexities involved in such a project, move requests are typically handled differently than your standard facility request. As the move order evolves, there are frequently multiple transactions inside this single request, with many tasks to coordinate and multiple updates and changes to be addressed and recorded.

Those organizations who have not adopted a process for coordinating moves, adds, and changes face a loss of productivity on the part of the workforce as well as increased cost to manage (which is an entirely separate e-book). Whether your team is seeking to improve on current procedures, create an entirely new set of guidelines, or starting from scratch, **you must first consider the following:**

How does your team receive employee move requests?

- The same tool IT uses?
- The same process as facility work orders?
- The manual method described above…email, phone, shoulder tug?
- No request process at all – people just move as they see fit

Requests are generated by individuals, admins, managers, executives, and sometimes your facility teams. Ensuring the project involves the right people from the beginning means understanding how requests originate and how the process evolves.

How are employee new hire and terminations updated?

Another potential move origination point is for new hires and terminations. This request typically comes from HR, but in some cases it comes from the hiring manager. **Hiring managers can and should leverage the same process that is in place for any other move type.** But for new hires and terminates there are opportunities to leverage your company's HR IS system. If HR is sending you an email and you are using a facility management software, it is highly likely that a process can be created to automatically generate a move ticket. Any time a new employee ID is created or an employee ID is terminated, it can trigger a move ticket. **It is important to know what HR system is in place as well as if and how your facility management software can capture this information.**

- Are notifications received from the same resources as move requests?
- Is HR sending you the information via email?
- Do department managers send you the information? How?

Another aspect to consider is how the facility team keeps up-to-date with employee profile changes.

In any given day, an employee's job title, employee status or department/cost center assignment could change. If this information is important for chargeback of services or space or to determine permission levels to access certain services and space, it will be critical for the facilities team to capture this information quickly, preferably within a single business day, in order to ensure efficient service delivery.

Facilities management must identify the following:

- How are you obtaining employee update information including name changes, job title, status and departments or cost centers?
- How accurate is this data and how often is it being updated?
- How do you update your resources and systems with the new information?

Once a move request is initiated, how is it received and what are your next steps? If you are utilizing a software solution such as IWMS, is a request log automatically generated? Is your log updated in real-time and how easily accessible is the data to qualified users?

One of the biggest challenges of managing occupant and asset moves is the frequency of change related to the final move and coordinating all the various task groups that are involved. **So it is important to consider how you are doing this.** What are the steps? How much time is it taking?

Depending upon the size and magnitude of the move, multiple departments are likely involved in the process. **Human Resources and IT must be able to communicate with each other, as well as the facilities team.** They should have the ability to share important details and remain apprised of the latest events in the move request.

What processes are in place to ensure all departments are on the same page and able to communicate freely with each other?

Are the individuals being moved updated on significant events and approvals and how are these messages conveyed?

- Are updates sent out manually via email?
- Do you have to have an in-person meeting on regular basis to keep the team up to date on recent activities?
- Are updates sent automatically through management software?
- Have you identified what information is relevant to involved parties?

While this can be a very time consuming process, implementation of the right software solution can automate many of these processes.

In order to identify the proper solution, you must first understand the entire move process, each parties' involvement, and what tools/information they need to fulfill their obligations.   Most parties involved in the occupant move are on to their next task once their job is complete. But what happens next is a critical step to consider.

- Do your current processes include floor plan updates? If so, who updates this data and how?
- Are HR systems and employee directory's updated? If so, how is this information updated and who ensures this step is completed?
- What other departments, such as the mail center, facilities team, and receptionist, might need this information? Is there a process in place to ensure all relevant parties receive such updates? Who is responsible for making sure this new data reaches the proper person?

Typically, the assigned location of occupants and company assets is critical information for multiple departments. Consider how these updates are currently made and look to your new software for automation of such processes.

How do you determine **utilization** of space?

Space Management

Proper space management is a critical component to every company's success. Because your workforce and workspace needs evolve continuously, so too will your space management processes. Ensuring your company's spatial assets are maximized, consistent data collection and analysis of individual and company-wide needs is paramount. There are multiple aspects to consider when evaluating your current processes and identifying if you are on the right track.

How are your floor plans currently maintained?

- Do you have your plans in Visio, PowerPoint, PDF?
- Do you maintain your floor plans in AutoCAD?
- Do you have a software tool that allows you to view floor plans and update when changes are made?

The manner in which your company's floor plans are maintained directly affects how they are updated. Are your records kept up-to-date with accurate cost center/ department assignments and employee location? Are these entries completed manually, uploaded through a spreadsheet or automatically updated once changes are completed?

When an employee changes location, a new hire is brought on board, or equipment changes hands, how do you and your team plan these moves?

- Do you print out floor plans and create scenarios by color?
- Do you create spreadsheets of move from-to lists?
- Do you have endless notes stored in multiple places?
- Does your company have a software system that allows you to create drag and drop scenarios?

Track space here, there, everywhere!

You very well can't carry your desktop or laptop computer with you while walking your floors and you don't want to drag all of those paper floorplans around either.

▶ watch video

If changes are made to the physical space, these updates must transfer to the floor plan drawings, so future moves can be planned accurately and efficiently.

How are these changes transferred to the drawings?

- An in-house AutoCAD technician who can make the changes. How much time does it take to get the drawings updated?
- If your Architect makes changes, what are the fees associated with this?

How do you determine the amount of space allocated or assigned to departments or cost centers? How do you determine utilization of space? Are reports automatically generated in facility management software or do you have to walk the floors on a regular basis to check who is in what space to determine use by occupant and department?

As real estate is one of your leading G&A expenses, it is critical to understand how it is used.

If you do **not have a good understanding of your company's space utilization, it is difficult to determine if the space is satisfying current workforce needs,** making it impossible to plan for the future.

The result is either too much or too little space, which impacts the bottom line both directly and indirectly. The direct expenses are lease and maintenance costs. Indirect costs are related to workforce productivity. The less productivity due to not enough space or not the right kind of space directly impacts your workforce's ability to create and innovate.

What is the current process for **reserving** conference, meeting rooms or huddle spaces?

Room Reservation Management

For organizations that have adopted the use of variable space as an alternative to fixed workspaces, it is important to understand how spaces are reserved and utilized. Even if variable spaces are not an element of your office design, gaining a clear understanding on this subject can provide some valuable insight into your organization and its spatial needs. The purpose is to ensure all spaces are used and meeting the needs of the workforce.

What is the current process for reserving conference, meeting rooms or huddle spaces?

- Is it done through Outlook?
- Is it reserved just on the hardware device outside the meeting space?
- Do you have software specifically for scheduling meeting and conference rooms

Once a reservation slot is filled, how are the details shared with the rest of your staff? How do you save employees from the embarrassment of double booking? Does your team have the ability to send out invitations, alerting occupants of arrival and departure times, required materials, etc.? Should your staff require auxiliary services such as AV equipment, catering, and room configuration, how are these services coordinated?
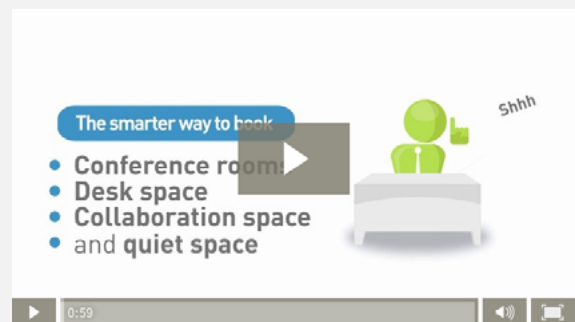
Are these processes automated through a software solution or is each step manually processed?

These are all very important items to consider.

By providing your team a robust room reservation tool, you not only assure your customers have what they need, when they need it, you also gain valuable insight into how company space is utilized and can better forecast future needs.

What is OpenSpace?

OpenSpace allows your workforce to reserve the type of space they need when they need it resulting in **better use of your space assets** and **more flexibility for your workforce**. OpenSpace is a room reservation app that provides the ability to reserve any type of space via your smartphone, tablet or desktop.

The smarter way to book
- Conference room
- Desk space
- Collaboration space
- and **quiet space**

Shhh

0:59

▶ watch video

How do you **track asset movement** from user to user, workspace to workspace?

Asset Tracking

The tangible assets your company invests in range everywhere from printers to life safety equipment, artwork and building equipment. What protocol has your facilities team adopted to track these investments and how effective are your procedures?

- Is asset information kept in a spreadsheet? Is there one spreadsheet for all various assets or are there multiple? Who maintains these spreadsheets and how is the information shared?
- Is asset information kept in the ERP system? If yes, how is asset detail and location updated?
- What information do you capture? Is it the same information for every asset?

As we become an increasingly mobile workforce, tracking the movement of these assets has become quite the challenge.

How do you track asset movement from user to user, workspace to workspace?

- Do employees request assets to be moved? If yes, do you have a software system in place to receive asset move requests and coordinate action? Do you receive an email notification?
- How do you keep your asset list up-to-date with accurate location?
- Are assets assigned to locations or to occupants?
- If assets are assigned to occupants, what happens if they leave the company?

Companies invest millions of dollars every year in critical assets to run their business, including everything from the coffee brewer to the HVAC system to laptop computers.

As these assets are consumed by the organization, it is critical to understand what has been purchased, where it is located, and who it is assigned to. For maximization of these investments, associated contract details for lease or maintenance, utilization and maintenance history or performance must also be logged and filed. Maybe you lack all the detailed information, but it is important to gather the data you have and implement a system for tracking location, utilization, and performance.

As the Facilities Manager, company Executives look to you for assurance operational assets are properly managed and utilized.

While you likely have processes in place for many of your management needs, how the information is stored, shared, and updated is just as critical as the data itself. If your procedures are not automated, you and your staff are likely spending additional time on redundant activities such as updating spatial moves on three separate platforms.

Valuable time is wasted that both indirectly and directly affects the company's bottom line.

When exploring software solutions that fit the organization's needs, take the time to evaluate the effectiveness of current procedures and identify software platforms that will integrate with those that are currently effective in use.

The result—investment in a platform that serves the entire operation's current needs, while collecting data to help you predict and plan for future changes.

Search, edit & manage assets anytime, anywhere, from any device!

The iOffice Asset Management app makes it easy for you to work from anywhere at anytime. You can use your asset's id, barcode or QR code to track your assets.

▶ watch video

*i*ffice
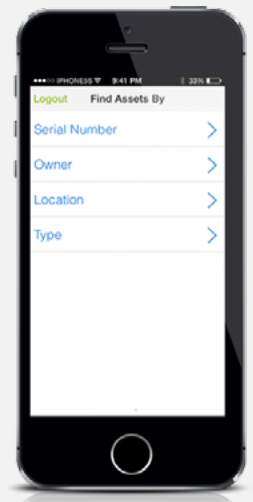
Workforce management tools that give you the information you want, when... how...and where you want it.

If you are ready to derive more value from your facility data, we are ready to show you how.

Learn More >

Request Demo >

See Pricing >

ioffice®

1210 W Clay St.
Houston, TX 77019
Phone: 713. 526. 1029
info@iofficecorp.com
www.iofficecorp.com

ENJOYED THIS WHITE PAPER? PLEASE SHARE: