

CRITICAL ITEMS

EVERY FM SOFTWARE RFP SHOULD INCLUDE

Choosing a FM software tool is a complicated decision, demanding the systematic gathering and assessment of vast quantities of information. As a result, you may want to utilize a Request for Proposal (RFP) document, to give structure to the information gathering and subsequent decision process. Putting together the RFP can be a daunting and complex task in itself. How do you get started? What do you need to include? While each organization is unique, the following are common items critical for a successful FM software RFP



OBJECTIVE:

Be very detailed in your project objectives. It is important to include what you want to accomplish with this tool. For example, do you just want to be able to view floor plans on-line or do you want to implement an automated process for coordinating moves adds and changes to keep floor plans updated? Do you want to implement a tool to manage operational processes or do you want to change the user interface also? Do you need to manage just on-demand requests or do you also need to manage preventative maintenance activities? Are these activities tied to services only or assets? There is a broad range of applications available some are very complex that can meet your requirements but might overexceed the requirements. There also tools that can only perform the bare minimum. Being clear about your objectives helps identify the best participants.





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SCOPE OF SOFTWARE REQUIREMENTS:

Provide a detailed, itemized list of what you want the application to do. This will require you to do some investigation on capabilities by software providers as well as define your internal processes and needs. For example, do you need the application to automatically dispatch technicians to perform a task or is a help desk receiving and manually dispatching? OR are you centrally receiving mail packages or do you need to check-in packages mobile? The more inclusive list you can create the better response you'll get from your vendors. This is also a good section to define your required application format. Do you want a network-based or web-based application? Regardless, make the vendor detail the IT requirements for their application. Some folks claim to be completely webbased but will require plug-ins for all users.

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PROPOSAL REQUIREMENTS:

This is a good section to ask vendor to describe their company and history and why they should be the vendor of choice. How are they unique and what benefit does that provide you? Ask the vendor to present qualifications and experience doing similar work through client references of similar size and scope and industry type. It is also beneficial to ask the vendor for their recommendations. Where do they see risks or holes in the scope of service? What are their suggestions for improvements? What value-added offerings do they have? The vendor should have some suggestions that reflect a depth of experience implementing and managing these type of solutions.



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SERVICE METHODOLOGY IMPLEMENTATION:

Once you have identified the scope of services and understand the company background, it is critical to understand how they execute service delivery. How long is it really going to take to get this tool functioning in a manner that is productive? What is their process for implementation? Do they have defined steps? Who is actually executing? We suggest meeting the team members by collecting background information. Are they employees of the software provider or they outsourced system integrators? The vendor should have clearly defined steps including data to be collected, formats required and estimated time frames. You need to remember that you need to be able to meet the vendors requirements as this will ensure your time frame expectations are met. Also, research the training strategy. Is there a User Guide? Do you participate in a class? How is the class delivered? Ask how long it takes to really learn how to use the system.

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SERVICE METHODOLOGY-ONGOING SUPPORT:

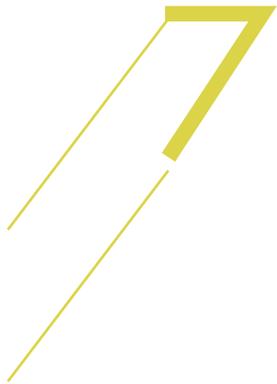
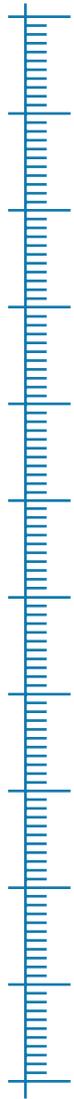
Things are rolling, what if you have a question or need general support? How are they set up to respond? Is there a customer-service desk? Provided by whom - the software provider or an outsourced help desk? How do you access resources - through the phone, email, on-line? Is it an assigned individual or are you dropped into a pool. Not that different forms of support are bad you just need to be clear so that there are proper expectations set for the primary users. You also need to consider software upgrades and changes. How are these delivered? How are you informed and educated about the changes? Are there fees for upgrades. You can expect upgrades to be provided in different formats depending on whether the software is hosted or installed on your network. Find out what type of technical resources on your side will be needed if any.





SERVICE METHODOLOGY- CONFIGURATION & CUSTOMIZATION:

We all recognize that every software tool is not going to satisfy every need in a manner that is exact to your requirements. However, you need to understand the vendors approach to managing your suggestions and recommendations. You should be aware that software customizations are expensive and time-consuming. The vendor, more than likely, has a set development road-map. This is good because the vendor is thinking about the future and developing enhancements to help you run your business better. You probably should ask about this in your RFP - what are your future planned enhancements? However, things come-up. You are out in the field and you see the daily, most urgent business needs. How does the software provider manage these type of requests? Ask their current clients.



PRICING:

So how do you pay for all this? You need to know all the fees because you want to make sure you have budgeted correctly and you also need to be able to compare proposals. It is a good idea to decide if the software will be a capital or operating expense as this will affect how you request the provider to present their fees. The components to consider are the software license itself, implementation, training, third-party system interfaces, ongoing support and maintenance, upgrades, data storage and ad hoc services. Is it seat or site based meaning do they charge user licenses? Is it purchased or a subscription? You also need to consider your internal cost to implement and maintain which will vary depending on the format of the application. Networkbased solutions will require significantly more internal configuration and IT resources.



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

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