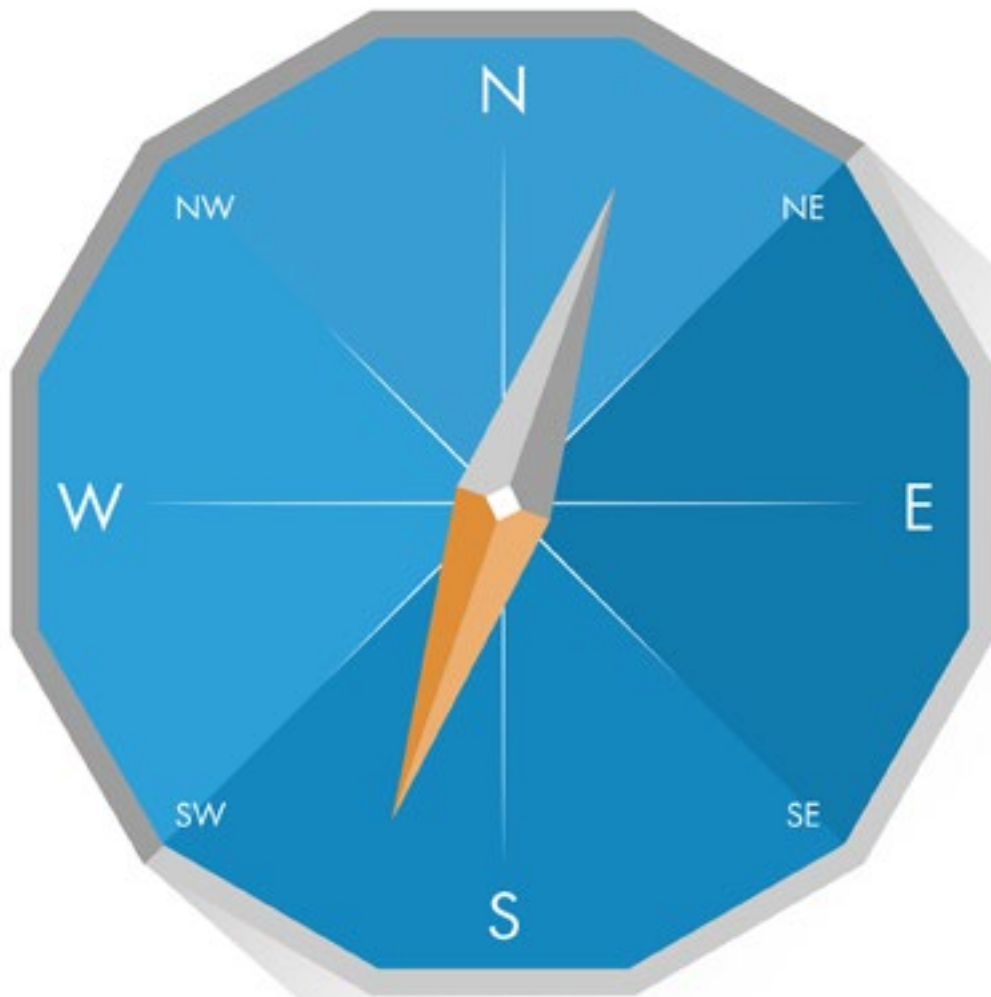


8 Practical Guidelines

to Evaluating Facilities Management Software



With the use of these guidelines, your organization will be better equipped for weighing all of your options while evaluating FM software.

Presented By:
ioffice

How does an organization attract new customers and clients while continuing to maintain excellent rapport with pre-existing ones?

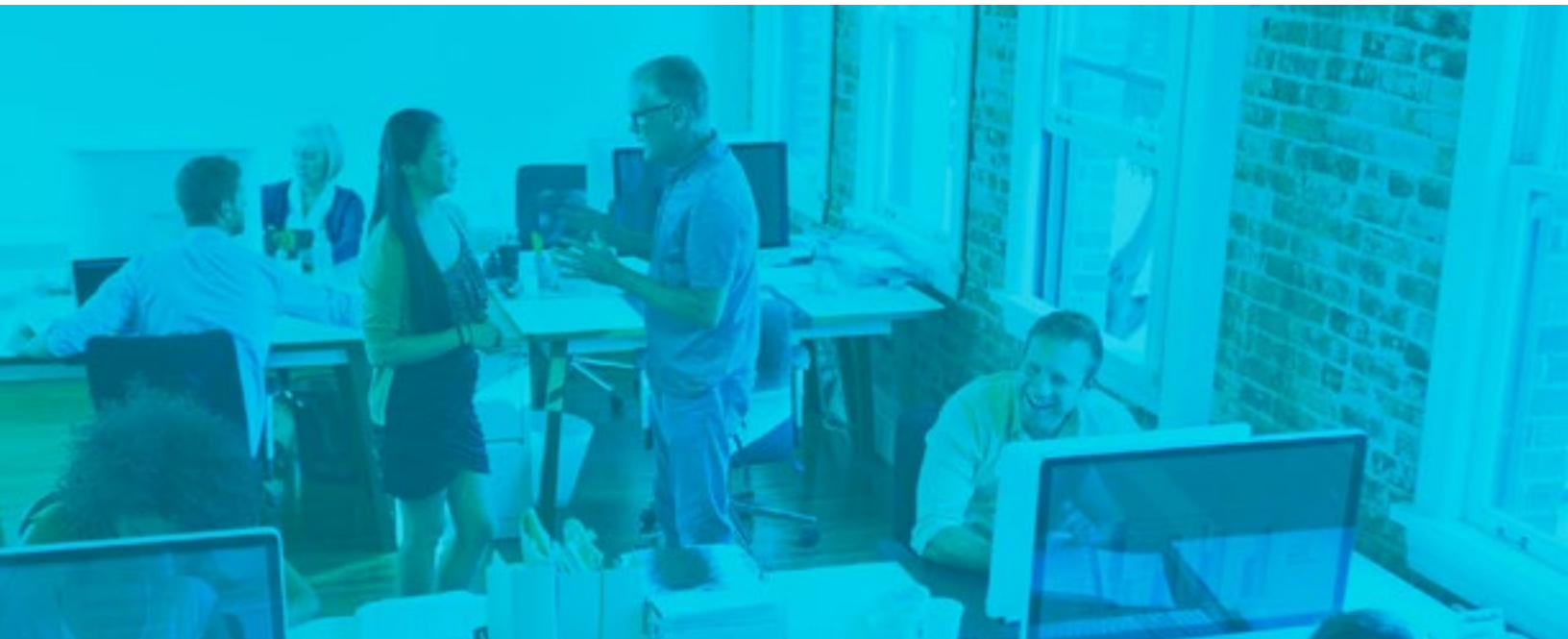
For most consumers, big or small, reliability and sustainable success of a company are key factors in their decision making process. But, how does an organization ensure that their business model and internal organization mirror and support these driving factors for continued growth?

Insert quality facility management team here.

As workspace needs evolve with the **ever-changing economy**, though, facilities managers, and corporate leaders find themselves facing challenges like never before. Pressure to find a way to do more with less is the only constant. Facilities managers must evaluate every aspect of the workspace, **thinking outside the box** for solutions.

To ensure success, more and more organizations and their managers recognize that they must turn to outside technological resources to improve efficiency, reduce costs and streamline all operations.

Based on our experience from working with **thousands** of facilities management professionals, in **companies of all sizes**, we have identified the most important factors to consider when evaluating facilities management software.



If you are unsure as to whether a facilities management software is right for you, there are **steps you can take** to make this determination.

If you are unsure as to whether a facilities management software is right for you, there are steps you can take to make this determination.

A detailed list of your short and long-term goals is the first place to start.

Our blog post can help you determine if, based on those objectives, FM Software is the right fit.

Once you have decided that a facilities management software would be an asset to your company, the next task becomes determining **WHICH tool is right for your organization.**

This task alone can be quite an undertaking. With the broad spectrum of tools available, choosing an application that meets your requirements while not over exceeding them is critical.

iOffice has developed this guide to provide the information you need to make a well-informed decision.

Based on our experience from **working with thousands of facilities management professionals**, in companies of all sizes, we have identified the most important factors to consider when evaluating facilities management software.

Is My Company Ready for Facilities Management Software?



by **Elizabeth Dukes**

Connect on [LinkedIn](#)

As the CEO of your company, you have likely had conversations with your team regarding advancements in technology that automate some of their work. You may have even heard how it will allow for **higher productivity** throughout the entire team, including yourself. Your FM team has watched all the demos, spoken with their peers, and are genuinely excited about the prospect of this **added value**.

 [read article](#)

1 What is Covered

With efficiency and versatility being so important for your facility management team, the last thing you want is to sign a contract for your new facilities management software, only to find that you have a laundry list of items that you thought were included but are not. These add-on items can make the difference between a truly cost-effective system, and one that bleeds you dry both financially and time-wise. Asking the right questions during your decision-making process will spare you these potential stresses.

What types of user licenses will be required and by whom? Are licenses purchased or a subscription? Knowledge as to what type and how many application licenses will **aid you in your budget planning**.

Maximizing the assets you already have on board will provide you with the most streamlined process.

Before getting started, check with your IT department regarding your facility's existing technology. Then, have the vendors provide you a **detailed list of IT requirements for their software system**.

Will there be any additional hardware, software or plug-ins required?

If so, consideration as to what systems are best for your organization and the overall cost comparisons should be of utmost interest.

Additionally, who will manage/maintain the software once it is integrated? If continued company support is provided, what are the fees associated with this support?

Important Questions to Answer

- What types of user licenses will be required and by whom?
- Are licenses purchased or a subscription?
- Will there be any additional hardware, software or plug-ins required?
- Who will manage/maintain the software once it is integrated?
- What are the fees associated with support?

The FM software company you are working with should have the **ability to adapt and grow** with you, as your needs progress.

There will surely be questions and concerns, once the software has been installed.

Support from the people who know the most about the system is critical, especially for those first few months. You will also likely find adjustments to the system are necessary; and a majority of the organizations choosing to install FM software move in stages, implementing a few pieces to the puzzle at a time.

Important Questions to Answer

- How does a vendor deliver upgrades?
- How are you trained on new upgrades?
- How will updates affect your daily workflow?
- What fees are associated with each upgrade and how often are they expected to occur?
- Does the software management company provide system back-ups?
- How often is the data backed up?
- How long are the backups stored?

The FM software company you are working with should have the **ability to adapt and grow with you**, as your needs progress.

We live in an **increasingly sophisticated** technological world in which upgrades and version changes are inevitable. We have all faced that frustrating moment when our work is halted due to a major software upgrade. And to find that upgrade comes with a hefty price-tag is all the more vexing. How a vendor delivers periodic upgrades and how they educate you on these changes is an important issue to address. How will updates affect your daily workflow? What fees are associated with each upgrade and how often are they expected to occur?

A system update that halts your ability to work could likely cost you more than just the upgrade fees.

If any of you have ever worked on a project, only to have your system shut down unexpectedly, you understand the importance of data back-up. Is system back-up required on your part, is it automatically saved to a Cloud system, or does the software management company complete periodically? How often the data is backed up and for how long it is stored/can be accessed in the event of a loss should be taken into consideration as well.

Furthermore, if mobility is a concern for you, and it likely is, you will want to perform in depth research on this subject with your prospects. We will discuss more on this decision a little later.

2 Core Functionality

Most facilities management tools offer capabilities that are essential to businesses of all sizes. While your organization may not need every one of these tools, you may find the need to add on as your goals are met.

The basic tools that you will want to see as an option for any system you are considering are:



Space Management

Space management applications aid you in the optimization of your physical space, providing you a clear picture of how your space is being utilized. With **real time information** at your disposal, you can clearly see how space is used and forecast future needs. The application provides you all of the tools you need, clearly and concisely, to ensure your space is being maximally utilized.



Move Management

Move management applications provide you with the necessary tools to facilitate a move anywhere in your portfolio. It aids you in **determining the most efficient**, least disruptive options, as well as tracking all of the tasks, costs and schedule adjustments associated with this move.



Maintenance Management

Maintenance management software applications allow for a central, easy to use system where personnel can place work orders and track the status of those orders in real time. More complex systems include options for facility condition management as well. This additional resource will help you keep asset management in check, allowing you to **evaluate the condition of your building and equipment**. Through preventative maintenance, you will maximize and enhance the life of your spatial assets.



Asset Management

Asset management applications afford you the ability to keep more efficient records regarding your organization's assets. By tracking what you have and where/how it is being used (and by whom) you are armed with the tools to understand how to optimize asset usage. **Through this optimization tool, you will see a reduction in capital expense.**

Aside from the general management tools that are available in most basic facilities management systems, there are **numerous additional tools** you will want to look for in a software system.

Additional Tools

Lease Management

Lease management software provides a central tracking system for important lease documents and information. This tool automates many lease tracking processes, **reduces errors in data entry as well as important lease dates such as expirations**. By reducing errors and automating such dates, you avoid penalties that might otherwise arise.

Room Reservation

Room reservation software is a tool that any bustling company should be utilizing. Have you ever scheduled a meeting with a client, only to find the space is already being occupied by one of your colleagues? Needed to come into the office for a few hours but found there was no desk space for you to work? The number of businesses allowing their employees to work remotely has **grown exponentially over the last few years**. This expanding number adds its own set of challenges.

Room reservation software such as [iOffice's Open Space](#) app allows employees to book conference rooms, collaborative and desk spaces as well as invite guests. Anywhere, any time. And since this tool links back to your operations management system, you avoid the challenges of over-booking and bottlenecks as well as eliminate redundancy. This tool's mobility and **ease of use** allows you to spend less time on the incidentals and more time on the essentials.

Environmental Sustainability

Environmental sustainability is a cause most companies large and small are moving towards, to not only save in dollars in the long run, but also to **“do their part”** for our Earth and it's resources. With Environmental Sustainability systems software, energy and water consumption is monitored, reported and forecasted.

This tool gives the facilities manager the capability to **identify trends in consumption** and make **informed business decisions** going forward. Understanding the budgetary impacts of sustainability projects well ahead of start dates allows for more careful planning and, ultimately, a **greater impact on the reduction** of their environmental footprint.

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.



[watch video](#)

As we have mentioned previously, it is important to map out both your current and future goals when choosing the right facilities management software for your organization.

While only a few of these management tools might be relevant to your business today, you should always consider how these solutions might aid you in your company's future endeavors?

Having a finalized package from the start is likely not the path you will want to take, as the amount of information may overwhelm even the most knowledgeable of employees.

Ultimately, though, you will more than likely need some of these options at your disposal as your team's efficiency grows.

The vast majority of vendors require you to purchase software packages, filled with unnecessary software that you might never use. Since each company's needs and investment goals vary, a package system will likely bog your network down with unnecessary tools. A more productive alternative is to align yourself with a vendor with a modular structure. **A modular system is built around your individual company's needs.**

Working with the vendor to configure a system that adapts to YOU and your company's core goals and demands is the most cost-effective answer.

By creating a client-based modular network, you have the option to **add modules as your demands grow**, molding your system to you rather than trying to fit YOU into the mold. This system stands to save you a significant amount of money in the long run.

3 Usability

It is important to remember WHY you are considering this software purchase. Your goals most likely include:

Visibility into your day-to-day operations, obtaining information that will aid you in decision making and a simplified process in which to process operational requests.

One of your main objectives is to increase your team's productivity by decreasing time spent on tedious tasks. **The right FM software will lead you on that path.** While all facilities management tools indicate that they are simple and easy to use, this is not always the case.

One must remember that there are two groups of people utilizing this software: the facilities management team and everyone else in the organization. In this team of players, there is likely a wide range of computer backgrounds and it is **necessary for EVERYONE to be able to utilize the system** with ease. If the end users are unable to submit a ticket quickly and easily, then they simply won't. If a ticket is not submitted, then their needs will go unmet, creating more work for everyone involved.

These software tools are only helpful if they are utilized; they will remain in the toolbox if they are difficult to use.



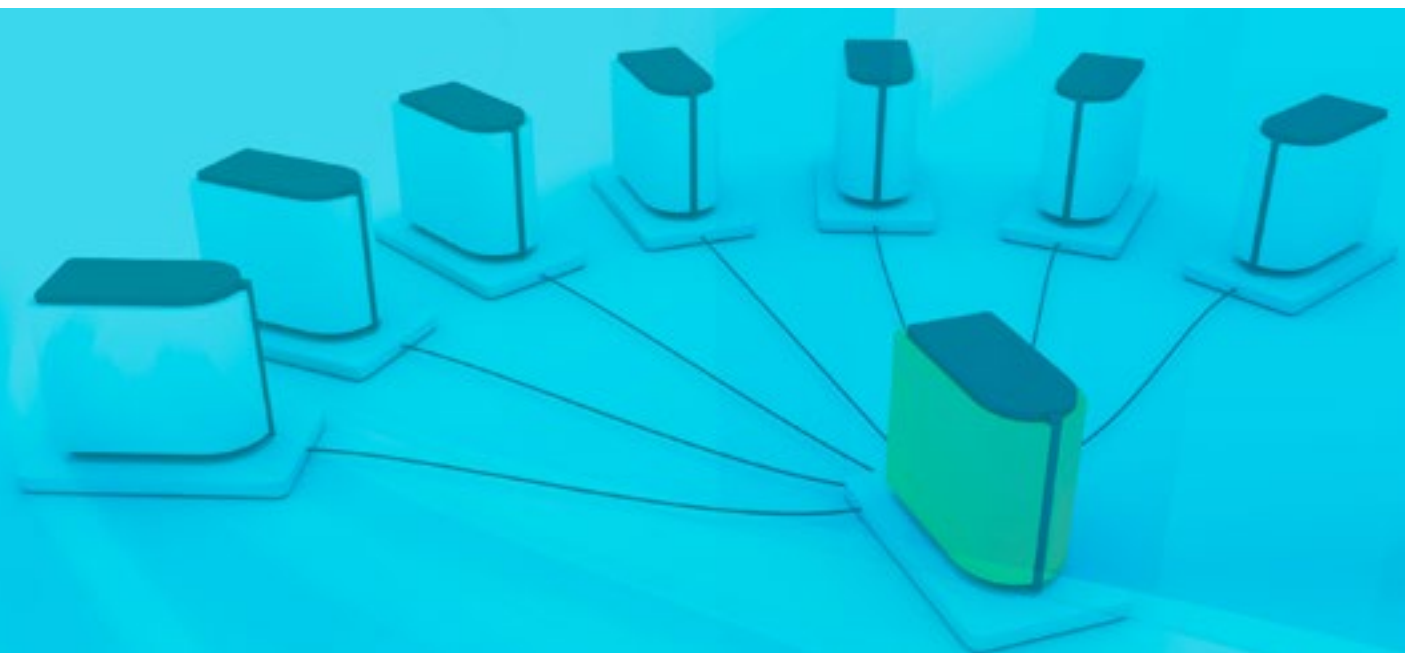
4 Successful Implementation/Integration

When considering the software that is right for your organization, you must find one that is well-organized and aligned with your common goals. One that will help you manage, rather than managing you. Examine what systems you are currently utilizing and which of those systems are genuinely working for you. Are you able to collect valuable data from your HR department? Do you have a work order system in place and how effective is that current system? Does it make sense to abandon your current systems or create a management system that interfaces with those currently installed?

The FM system you choose should be one that easily and economically interfaces with your currently installed systems.

When speaking with the software vendors, ask for a sample schedule of how their process works, with the timeframe included. Who performs this system integration and what is their scope of experience? Do they have a standard API or is this process customized for each customer? **What are the additional fees associated with this customized process?** Is this completed by the software company itself or by an integrator--and what is their experience level? Ask what is the software company's success rate?

The work that will be required by you, as the customer, is a key element to consider when choosing your management software company. What resources will be required from you and **how much time you will be required to spend** means the difference between a system that genuinely works in your favor, or one that "costs" too much. What is the format for training and how much time will it take for the departments to learn their tasks? In a workforce where time is valuable, a fully integrated and easy to learn/use system is critical.



5 Ease of Configuration

Management of growth of your ROI are likely primary objectives you are trying to achieve through this facilities management software. As these goals are met, your software needs will grow and change as well.

Look for a solution that is the right size for you now, but also has the ability to progress with you and not at a high price- tag. These new adaptations must be able to **integrate both easily and quickly**, ensuring your continued growth does not suffer.

While roughly 80% of your needs will be met with an out of the box solution, approximately 20% will need to be customized to your organization.

Does the vendor have a roadmap for your growing needs? What are their recommendations based on their experiences? While a quality vendor will not only anticipate many of your needs, they must also has the ability to work with you in customizing a software solution to meet all of your demands. You as the customer, should not have to conform to the vendor, they should be able to adapt to you.



6 IT Structure

The systems available for facility managers span a wide range. Vendors are constantly expanding their software capabilities, both adding to their existing systems and constructing additional modules. From an IT standpoint, choosing the best platform for your existing software system and needs is critical.

The structuring of the software hosting will have a major impact on your bottom line, each with it's own advantages and/or disadvantages, depending upon your position.

Web-based (SaaS)

If the system is web-based, the software is housed on the vendor's system(Cloud), as well as all collected data. You are given web access to the software, which means you have the ability to **sign on from anywhere at any time**. Your company won't waste valuable resources by needing to have an IT team trained and dedicated to the servicing of this system. Confer with your IT team to ensure the software system meets your IT standards, and inquire as to how much(if any) additional software would need to be purchased to make your current system compatible. An added benefit to SaaS is that **upgrades occur automatically**, with no disruption to your workflow. More and more systems are moving in this direction, **reducing start-up costs** and allowing for a more agreeable fee structure for every size of organization.

Internally hosted

Some FM software systems are hosted internally by you as the consumer. If this is the path you are contemplating taking, it is critical to consider all of the costs associated with this **antiquated system**. Calculation of the hardware costs-you will need a dedicated server for hosting-and technical configuration requirements are important. You will want to inquire as to how system upgrades are handled (and the associated costs) as well as the ongoing cost of implementation and maintenance by your IT department.



7 Mobility

With a large percentage of the workforce today working on the go, mobility software is more critical than ever before. Whether working from home, on an airplane or in your car, access to all the tools, allowing for a seamless interchange of information between departments, is paramount to your company's success.

With that in mind, the true mobility of your new facilities management software is of great consideration.

If the system has mobility capabilities, is the software accessed through a mobile app or through a mobile-friendly website? What aspects of the software are mobile--are you limited to only viewing the software or are you able to perform tasks and interact, as well? What specific devices is this software compatible with and what is the added cost behind this? You will want to examine your company's specific needs, for both **now and the future**, when determining if this software is capable of meeting **all of your mobility needs**.



8 Security

With almost every aspect of our lives exposed to the web world in some capacity, concerns regarding privacy and security are heightened, to say the least. While you will need your new FM software to be easily accessed from almost anywhere, this access elevates your chances of being compromised. Your vendor prospects should have the ability to help you with all of your security concerns.

Whether in the office or away on a business trip, you likely want your teammates to have 24/7 access to these tools.

Your solution should allow for remote users to confirm who they are through a secure authentication process. Through **single sign-on**, and the **proper authenticating**, you ensure your company's private information is never compromised.

Another security aspect to examine is user access. If you have the ability to control access, you ensure that each user gains access to only the information and applications that are relevant to their position. The FM solution should include capabilities that allow administrators to **define permissions for various levels**, based on needs.



As higher demands have been placed on you and your team to solve more complex issues with fewer resources, FM systems are fast becoming the most essential tools in your “toolbox”.

These systems provide visibility into the day-to-day operations, arming us with clear analysis of how and where to increase efficiency. With this efficiency comes stronger customer service, at lowered costs. Yet many find their expected goals have fallen short, due to lack of planning and consideration, prior to software implementation.

With the use of this guideline, your organization will be better equipped for weighing all of your options.



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