ioffice®

How to Succeed With
FACILITY
MANAGEMENT
SOFTWARE

AN IMPLEMENTATION LESSON PLAN

Introduction

A **Facilities Management team** has many moving parts to oversee at all times and the success of the company is heavily reliant on how well the FM handles each factor. **Aligning the workforce, processes, and technology is critical to this success.** Implementing automated processes is the first step to achieving desired results; and you cannot achieve a successful automation program without the support of your workforce. Involving the right people from the beginning sheds light on what processes are working, which are not, how better results can be achieved, and how the implementation of new technology can support you in these endeavors. Fortunately, there are a multitude of options available today that can offer support in empowering your team and identifying the prowess needed to realize notable success. For many, these options begin with investment in **Facilities Management software.**

Workspace automation optimizes productivity

With the right tools in our armory, FM teams have the ability to identify every cog in the wheel and exactly how they contribute in achieving organizational goals. Through the use of data reporting, teams can use the past to better manage the present and predict the future. Innovative Facilities Managers utilize FM software solutions to automate processes because they know it can offer increased efficiency and a measurable boost in productivity, leading to a speedy return on investment and achieving a higher, more positive impact on the company's bottom line.

Data Reporting & Analysis

84% of surveyed IWMS users note an increased ability to track data and reporting by implementing iOffice at their organization.

http://www.techvalidate.com/tvid/BD3-207-2D4

Reduction in Workplace Costs:

Workplace costs can be reduced by **5-20%** in the first year alone.

Measurable Boost in Productivity

85% of IWMS users surveyed report increased productivity of their FM team by 16-30% or more.
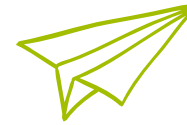
http://www.techvalidate.com/tvid/BD3-207-2D4

Return on Investment

An iOffice client reported a 4-6 month return on their IWMS investment.

http://www.techvalidate.com/tvid/435-730-AD1

How Do You Get Started?

But how do you get started ensuring a successful implementation process? How do you manage the project internally and establish a framework that involves your entire workforce? Don't allow your fear of the unknown to hinder your progress.

This ebook outlines the steps required to achieve notable ROI, improve overall organizational processes, and set your employees up for success.

Use the templates and checklists we have included to help you throughout the implementation process.

Data analysis & Reporting

FM Strategy

FM, HR, & IT Alignment

Metrics & Analytics

Technology

Traditional workspace

Involving your workforce

IWMS Integration

Utilize emails & phone calls for communication amongst departments. Disparate data across multiple platforms.

Offer end users the ability to contribute throughout the IWMS integration process.

Alignment between all departments, particularly IT and HR. Integration to 3rd party software platform.

Improve business results through the consistent analysis of collected data.

Automate management processes   **Increase revenue**

The iOffice Framework

The iOffice team's primary goal is for our clients to realize success through the implementation of our management tools. We are here to guide and support you, both during software integration and beyond, and have developed an integration framework to ensure such success.

The more fine-tuned your processes are, the further up the ladder you will climb. The company's success is reliant on three factors:

buy-in from your entire workforce + processes + technology

The iOffice framework can help you overhaul your processes, automate when appropriate, and support ongoing innovation.

The roadmap we have developed for a successful software implementation requires complete analysis and understanding of how your company currently conducts business, as well as the fine-tuning of both short and long-term goals. This will serve well beyond the IWMS integration, enabling your organization to achieve the ongoing changes and innovation required to attain consistent and long-lasting results.

This ebook is a guideline to prepare you for how the implementation process works, what is expected of us as the vendor, what will be required of you, as the client. We will provide you with questions that will allow you to delve deep into what the company's vision is for this project, which will also serve as a guide for our implementation manager to ensure optimized support.
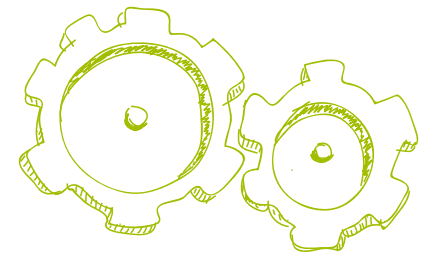
Plan

→ Introduce key players and define roles and responsibilities
→ Collect data
→ Define reports
→ Understand customer business objectives
→ Analyze current business processes vs. objectives

Configure

→ iOffice recommends design configuration based on best practices and data collected
→ Client reviews and approves design
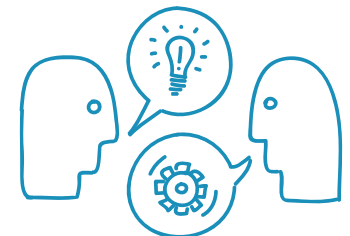→ iOffice configures site

Test

→ iOffice & customer test site
→ Client makes necessary change requests
→ Client approves configuration

Deliver

→ Customer receives training on how to use their new system for maximized results
→ Site deployed to end user population

Step 1: Plan

→ Assign Roles
→ Schedule Meetings
→ Establish KPIs

The planning stage is the longest and most essential phase of the implementation process. To ensure your new tool supports the business transformation you envision, spend an adequate amount of time delving deep into the many facets of your company. Draw the whole picture by gaining a clear understanding of internal processes, company culture, use of technology, and business objectives. Total transparency and communication with your software vendor will offer the implementation manager the information required to plan a successful software solution.

Early in these planning meetings, identification of roles and resources will be established and an implementation roadmap is built. Once you have an understanding of where you are today and where you want to go, you can begin to build your project.

Here are a few tips to get you started:

- ⊘ Identify key players & define their roles and responsibilities.
- ⊘ Involve IT and HR department heads and discuss their involvement.
- ⊘ Schedule a meeting with teams who will be involved in the project. Communicate individual involvement, expectations, timeframes, objectives, and benefits.
- ⊘ Establish KPIs for implementation.

Homework Assignment
Pre-Kickoff Discovery Q & A Template

The following is a list of questions you can answer to help our implementation manager understand your company's business culture, current methods, and overall objectives. This will prove beneficial in identifying which modules will benefit your company and how they should be configured for maximized ROI.

1. Please define the top three objectives for implementing facility management software:

_____

_____

2. What are your biggest challenges and concerns?

_____

_____

3. Employee data is a foundation for the iOffice portal. What is your system of record for Employee/Contractor data?

_____

_____

4. How many locations or buildings does your company currently use and how are they segregated?

_____

_____

5. How are your current floor plans updated and who manages them?

_____

_____

6. How are move requests generated?

_____

_____

7. How is the facilities team notified of move requests, new hires, and employee terminations?

_____

_____

8. What is the current method of communication regarding move requests to involved parties?

_____

_____

9. How is user information updated in other systems or resources? Ex. Drawings, kept spreadsheets or 3rd party systems.

_____

_____

10. Is there a current system in place for work order management – on-demand and PM's? If so, how effective is it?

_____

_____

11. How are work orders submitted? Who has the authority to generate these orders and who handles them once they have been submitted?

_____

_____

12. Do you have recurring tasks with dedicated support? Ex. Are PM tickets necessary and are they assigned to specific individuals.

_____

_____

13. Are technicians/operators assigned to specific tickets and do they have backups? (ex) Does one person handle all HVAC types of tickets.

_____

_____

14. What types of assets do you currently manage?

_____

_____

15. How do you track these assets?

_____

_____

16. Do you track contracts and maintenance agreements associated with these assets?

_____

_____

17. Are you providing on-demand and preventative maintenance work order management for company assets? If so, what is the process for this?

_____

_____

18. Are there existing systems that will need to be migrated?

_____

_____

-> Plan
Single Project Example: Service Request Program

OUTPUTS

➜ Define objectives

ASSIGNMENT

➜ Answer the following questions:

Do you currently have a service request program in place?

What tools do you utilize for support?

How are work orders submitted?

Do you have dedicated support? If so, does this vary depending upon the scope of the request?

How do you communicate with outside technicians?

Rank the following in order of importance:

- Preventative maintenance

- Emergency servicing

- Repair servicing

Homework Assignment
Role Assignment Template

Once the components of the implementation project are identified, a project plan is developed, giving management a clearer understanding as to the roles and resources needed for progress. One of the most important ways to ensure success is to assign the proper role to key players and make sure each party clearly understands their duties. By defining these roles early on, you give teammates ample time to receive any training and resources needed and increase your chances of buy-in from your workforce. Remember that people typically do not welcome change, so be sure to champion an environment that is supportive and promotes questions.

Typically speaking, team members can be broken down into three categories:

Decision makers / Administrators / Supporting players

Decision Makers

Your Executive Level supporters
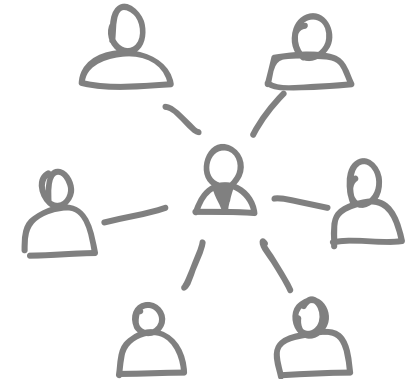
→ Establish the team objectives

→ Communicate the importance and objectives of the project organizationally

→ Approve processes and changes that stand to impact the organization

→ Identify the right team players, assign roles, and clearly define what is expected of them

→ Ensure progress remains on track towards desired goals
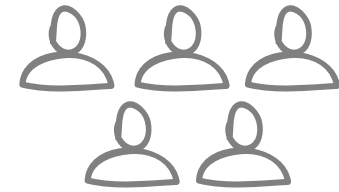
→ Role Assignments: _____

_____

_____

_____

Administrators

The power players

→ Understand the objectives of implementation and its impact on the business

→ Translates requirements to system configuration.

→ Works enthusiastically and cross departmentally Offers the technical knowledge needed for integrating with already existing systems

→ Communicates with decision makers regarding progress

→ Delegates tasks to the supporting players

→ Makes suggestions regarding best practices based on their knowledge of the project and the company

→ Analyzes the state of progress, measures success, and adjusts as necessary
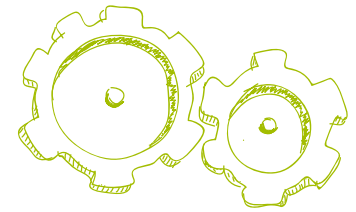
→ Role Assignments: _____

_____

_____

_____

Supporting Players

Your additional team members

→ Embraces the project and its objectives

→ Understands their personal role

→ Reports back to Administrator on delegated tasks

→ Role Assignment: _____

_____

_____

_____

Step 2: Configure

Once all of the goals have been communicated and a project plan has been defined, the iOffice team members will get to work on the configuration process. We believe in practicing the processes that we encourage, so there will be multiple members involved during the configuration stage based on their area of expertise. You will be consulted throughout the project to ensure your customized plan is progressing accordingly and to answer any questions or concerns that might pop up along the way. To ensure maximization of your IWMS investment, make sure that necessary changes are occurring within your organization so that your workforce is informed and prepared for a smooth integration process.

Prior to and during the configuration process, your team will be responsible for gathering and sharing data that will be loaded into your new software tool. Once the module implementation structure has been defined, a more specific plan of action can be set in place regarding the order in which you gather data.

You will need to gather the following data:

- ⊘ Copy of current maintenance (or redefined) maintenance request forms
- ⊘ Asset data, including type, location, and ownership
- ⊘ Facility names, locations, and RSF (owned or leased?)
- ⊘ Details regarding occupants/employees, including location and assets
- ⊘ AutoCAD space drawings

Meet the iOffice Team Members

Throughout the project, you will have multiple members of the iOffice team working on your modules to ensure organizational needs are met. Let's take a look at those team members and their areas of expertise.

Implementation Manager:

This manager is involved in every phase of the project. They are an expert on our products and ensure industry best practices are met.

Customer Relationship Manager:

You will work with this manager to ensure you receive the ongoing support required.

Database Engineer:

The database engineer is responsible for the import of data.

AutoCAD Engineer:

This engineer is an expert in AutoCAD drawings and will prepare and load all drawings into your IWMS.

Development Engineer:

As an expert in automated interfaces and iOffice API's, your development engineer will offer AUP, SSO, or other necessary system interface support.

Homework Assignment
Reporting and Measurement

Each module of your FM software has the ability to collect data that will serve as an invaluable tool in the growth and progress of the company. Consider your organization's business objectives and how key metrics can aid in you meeting these goals. Answer the following to determine what metrics should be included for which modules:

What are your most critical business objectives?

_____

_____

Do you currently have a reporting system in place to measure your progress towards meeting these objectives?

_____

_____

Can you provide copies of these reports?

_____

What key metrics do these reports offer you in regarding the management of your space, services, and assets?

_____

_____

What, if anything, is your current reporting lacking?

_____

_____

What information would you like to see that you cannot currently access?

_____

_____

-> Configure
Single Project Example: Service Request Program

OUTPUTS

➜ Service Request Program defined and outlined

ASSIGNMENT

➜ Answer the following questions:

Set objectives for the program.

Clearly define which aspects of the program ARE working and explain how/why they are working.

Clearly define which aspects of the program ARE NOT working and explain how/why they are not.

Use above knowledge to determine what changes should occur. Is the problem in communication? Not enough tools currently in place? Does the breakdown occur when communication with 3rd party technicians is required?

Do you have a Preventative Maintenance Plan in place?

What metrics are you using to determine the success of your program?

What questions should be asked and answered so the technician has all the answers they need for servicing?

For a more complete list, please download our checklist:
100+ Questions to Ask Yourself When Creating a Work Order Process.

Step 3: Test/Validate

The third phase of your Facilities Management software implementation project is Test/Validate. At this stage, iOffice will work with you in testing the site to ensure all aspects meet the defined project plan and strategies identified in the planning and configuration stages. If you have not already done so, now is the time to kick off any changes in management and processes that you have planned. This will ensure your team is familiar with these new processes, any kinks have been worked out, and that the workforce is fully prepared once your new software goes live.

Communication is paramount during this time, as any issues with the configuration of the software modules must be identified and addressed. Obtain feedback from members identified in your role assignment template and pass this information along to your Implementation Manager. Any changes that have occurred during this stage must be tested before the site goes live. This is also when you will want to identify who should be involved in the training process and get that set up with your iOffice representative. Your investment is now ready to go to work for you, but your workforce must know how to utilize the tool for maximized results. Our team's goal is to help you reach (hopefully exceed) company goals, but it is critical that you leave enough time for training.

Homework Assignment
Training Checklist

- [ ] Identify who should be involved in initial training. Involve key players from each department, including IT and HR.

- [ ] Schedule a kick-off meeting to review expectations for training and identify any questions that might need to be answered before getting started.

- [ ] Assign team roles specific to training, as once key players have received training, they will need to pass this information on to the rest of the workforce.

- [ ] Determine how training will be delivered (ie. self-paced, group setting).

- [ ] Choose your training dates.

- [ ] Set your training goals.

- [ ] Determine ongoing training that will take place on quarterly basis.

-> Test/Validate
Single Project Example: Service Request Program

OUTPUTS

→ Configuration of the new Service Request program

→ Testing of the new Service Request program

→ Launching of the new Service Request program

ASSIGNMENT

→ Configure program based on data collected and analyzed during the configuration stage

→ Insert tested service request features

→ Insert new aspects to your program

→ Test program

→ Make necessary changes

→ Launch program

→ Review data and metrics more regularly at first to identify any modifications that should be made
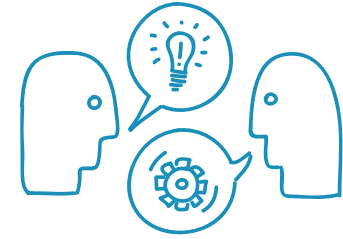
Step 4: Deliver

So, your new FM software solution has been tested and tweaked and is ready to go live. We have hopefully delivered a product that will serve your FM team well in helping realize organizational growth and a firm handle on management of its people, spaces, and assets. We are sure you will have a lot questions in the coming months and we will be there with the answers and support.

Many companies make the mistake of thinking the project is over once implementation is complete. Do not fall into the trap. Remember that technology and innovation are key to ongoing success.

As the Facilities Manager, it is part of your job to ensure your company is on the cutting edge, remaining on the forefront of technology and innovative solutions.

As your organization grows, it is critical that your processes and tools change and evolve with you. Utilize the tools in front of you, keep an eye on the future, and remain proactive at all times.

Homework Assignment
Service Request Program Growth Assessment

The most effective way to ensure your company remains on track for future growth and innovation is through continuous assessment of your processes once implementation is complete. Where are you positioned now, what are your future goals, and does your newly implemented Service Request Program support those future goals? If you determine a baseline of your progress now, you can predict future necessary changes and begin mapping out projects that will support your continued success. The metrics and data management in your new FM software solution should provide you with the answers you need. Rate your progress on a scale of 1-3.
A few details you will want to consider are:

① ② ③ Number of requests submitted by location, category, and priority within a specified date range.

① ② ③ Number of requests submitted by priority and affected unit.

① ② ③ How many requests were completed on time (compared to SLA, estimated completion, priority, and date required).

① ② ③ Number of requests resolved upon first contact.

① ② ③ Number of requests re-assigned to a new technician (and why).

① ② ③ How many requests were completed per operator.

① ② ③ Summary list of completed requests.

① ② ③ Summary of closed requests and why were they closed before completion.

① ② ③ Current number of open requests.

① ② ③ Average age of current open requests.

① ② ③ Detailed list of completed requests, with details including: request type, requestor, operator, resolution, time open, cost, etc.

① ② ③ Number of requests with errors in categorization, assignment, and prioritization.

Conclusion

Implemention of Facilities Management software helps your FM team in improving processes and allows for more effective management of assets and space. To achieve maximum results, be sure to continuously analyze data collected, invest in the latest in technology, and modify the management of your resources regularly. Consistently encourage your workforce to evolve and learn new things and foster a creative workplace culture, as such support often leads to innovative business solutions.

Why Settle When You Can Choose the Experts?

The iOffice experts are here to help make your business goals a reality. With over 1,800 clients, 20% of those are Fortune 1,000 companies, we have learned what it takes to reduce facility downtime, increase productivity, and cut operational costs. Our team is equipped with the knowledge and experience to assist businesses of every size and is dedicated to the continuous development of innovative solutions for both ourselves and our customers.

Plan → **Configure** → **Test** → **Deliver**

→ Project Planning to Build a Foundation
→ Software Implementation Services
→ Technical Guidance & Support
→ Training to Set Your Workforce Up for Success
→ Ongoing Customer Support

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