

# Checklist ✓

## A Simple Guide to Successful FM Software Implementation

Facility Management software is a great tool for tracking organizational resources, analyzing your business needs, and automating your procedures. To help ensure a smooth process from the consideration phase all the way to completion, we have created this checklist for you to use.

### BEFORE YOU BUY

#### ☐ Identify your company's short and long-term goals

What are you looking to accomplish in the first week, month and year?

#### ☐ List current organizational processes

Analyze and discuss current processes and workflows and identify any changes/improvements that need to be made.

#### ☐ Determine "pain points"

Understanding your key business requirements and "pain points" will not only aid you in the vendor selection process but will also help convince the C-Suite that this is a sound investment.

#### ☐ Identify what works and what doesn't

Involve various members of your workforce to gain an overall vision of what they desire, yet are not getting out of the current tool. For example, improved efficiencies, procedural metrics and reporting.

#### ☐ Determine mobility needs

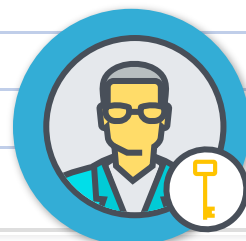
Mobility is an important aspect to consider when choosing which vendor to align yourself with. Talk with other workplace employees to determine mobility needs and how they will change as organization goals are met.

#### ☐ Develop a timetable

Break your timetable up into smaller goals and communicate this to both the vendor (once chosen) and your workforce.

#### ☐ Identify key players that will be involved in the project.

Make sure team members understand their role, what is expected of them, and any time constraints associated with each task.





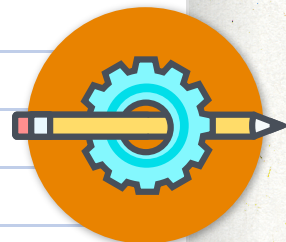
## 2 CHOOSING THE RIGHT VENDOR



Doing your homework and asking the right questions of potential software vendors will help ensure you make the best decision for meeting your business' needs.

### ○ Collaborate with IT

When meeting with the vendors, have them provide you a detailed list of IT requirements for their software system to determine what extras you might need to purchase for compatibility.



### ○ Research vendors

A vendor's experience and success rate with customers in the same industry, size, and scope. Ask for case studies and referrals whenever available.



### ○ Inquire about the vendor's approach to software building

Do they require you to purchase the full software package or do they create a client-based modular network? Can you purchase additional modules as needed?

### ○ Get a sample schedule with a timetable included

How closely does this match the timetable your team came up with during the initial planning meeting? Are they giving you enough time to collect your data? Are there SLAs set up if the vendor doesn't meet the implementation schedule?



### ○ Dashboard analytics

Align yourself with a vendor that delivers pre-built dashboards, as well as enables end-user dashboard configuration to fit personal work styles.

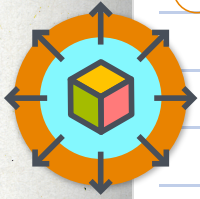


### ○ Mobility apps

Does the vendor offer advanced mobile/offline capabilities, which will help in the automation of processes, eliminate paperwork, increase productivity and improve costs? Inquire as to the mobile limitations of the software - are you limited to viewing capabilities only or can you perform tasks?







## ○ Design of tool

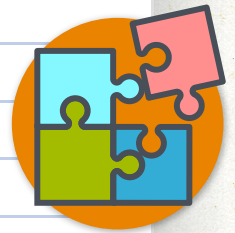
Your business tools are only beneficial if your workforce uses them, so make sure you invest in a tool that's design focuses on the user and will accommodate ALL experience levels.

## ○ Discuss how training will be handled and who will be involved in this process?

Ensure a higher rate of ROI by understanding all that is involved in training (including costs associated) BEFORE you make any final decisions.

## ○ Important integrations

Can the chosen vendor integrate easily (and cost effectively) with your ERP system, HR, IT help desk, etc. Find out how much these integrations will cost before you sign the dotted line.



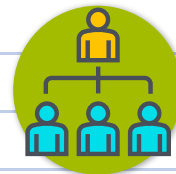
## 3 YOU BOUGHT IT, NOW WHAT?



Taking an active role in understanding the steps involved in your software integration will simplify the process, saving you both time and money.

## ○ Determine roles

Each member's role should be clearly defined to ensure maximized return on your investment.



## ○ Define SLA's

Keep the implementation project on time and budget by reinforcing the time and resources required to get up and running on the new system.





## ○ Each member's role should be clearly defined to ensure maximized return on your investment



- Will we have a dedicated implementation manager and what should your FM team have ready for him/her?
- How much will my IT staff need to be involved?
- What is the FM team's role for implementation and how much time should we dedicate to this entire process?
- Can we transfer over our current data and how is this handled?

## ○ Confront the "friction of change" by preparing your people for the change

Early communication and training with your workforce will ensure buy-in.

## ○ Ongoing support is critical to the success of your implementation

The vendor should be an extension of your team, there to guide you and answer questions both during and after implementation is complete.

- Does the vendor have a roadmap for your growing needs?
- What are their recommendations based on their experiences?



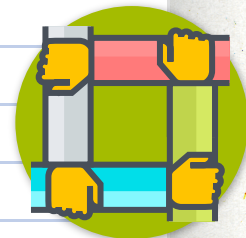
## ○ Protecting your data



What is our role in system back up? Is it automatically saved to a Cloud system, or does the software management company complete one periodically? How often is the data backed up and for how long it is stored?

## ○ Make sure your house is in order

"The tools are cool but processes rule." Don't make the mistake of assuming your new IWMS will fix all of the organization's problems. Engage your workforce in identifying and addressing procedural issues so you are set up for success.





○ **Set up an audit for 6 months after implementation is complete**

Perform a quality assurance test on data and processes. Check with users to identify what is working and what is not and make adjustments accordingly.

○ **Define reports**

Make a list of the Key Performance Indicators (KPI) you want access to, which will help your team measure improvements, overall return on investment, and identify additional necessary changes.

○ **Collect data**

Employee and spatial data is the foundation for your FM software. Our eBook How to Succeed With Facility Management Software serves as a great guide in determining which data you should be collecting.



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