

Trust me, I'm a Doctor

FM:Interact HealthCheck by JLL

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Agenda



01

Why perform a HealthCheck?

02

How is the HealthCheck achieved?

03

What are some of the typical outputs?

Why perform a HealthCheck?

Do I?

Need a HealthCheck

There are many reasons a system health check may be a good idea. A few common examples may help you decide how to make the most of your time with “the doctor”.

I think we can do more with our solution but I’m not sure where to start



There are still a lot of manual processes that could be automated, right?



Some of my reports are slow and I’m worried the data isn’t accurate



Some of our processes have changed but we haven’t updated the system

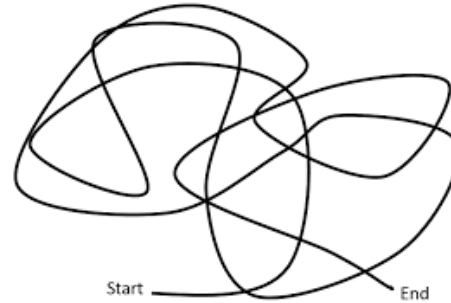


You might need a HealthCheck if...



It's OK, I do it
in Excel...

Excel has its place in life, but it is not a database – please stop managing data in it.



The data gets entered
via many screens...

Your process has evolved over the years, but FM:Interact is in the same state as the first day it was installed.



It's integrated, I manually
enter the data...

Unfortunately, steps completed by a human don't count as automation.

How is the HealthCheck achieved?



The Formula for Success



+



+



=



Future State
Vision

Pain
Points

Improvement
Opportunities

Future State
Enablement

Knowing What to Measure

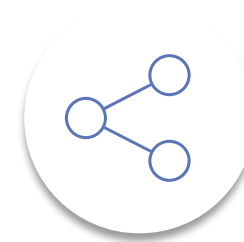
"The three-legged stool"



Technology



Data



Process

Prepare for your visit

The self-assessment tool available at fmsystems.com will help you identify areas to focus on to get the most from your solution.



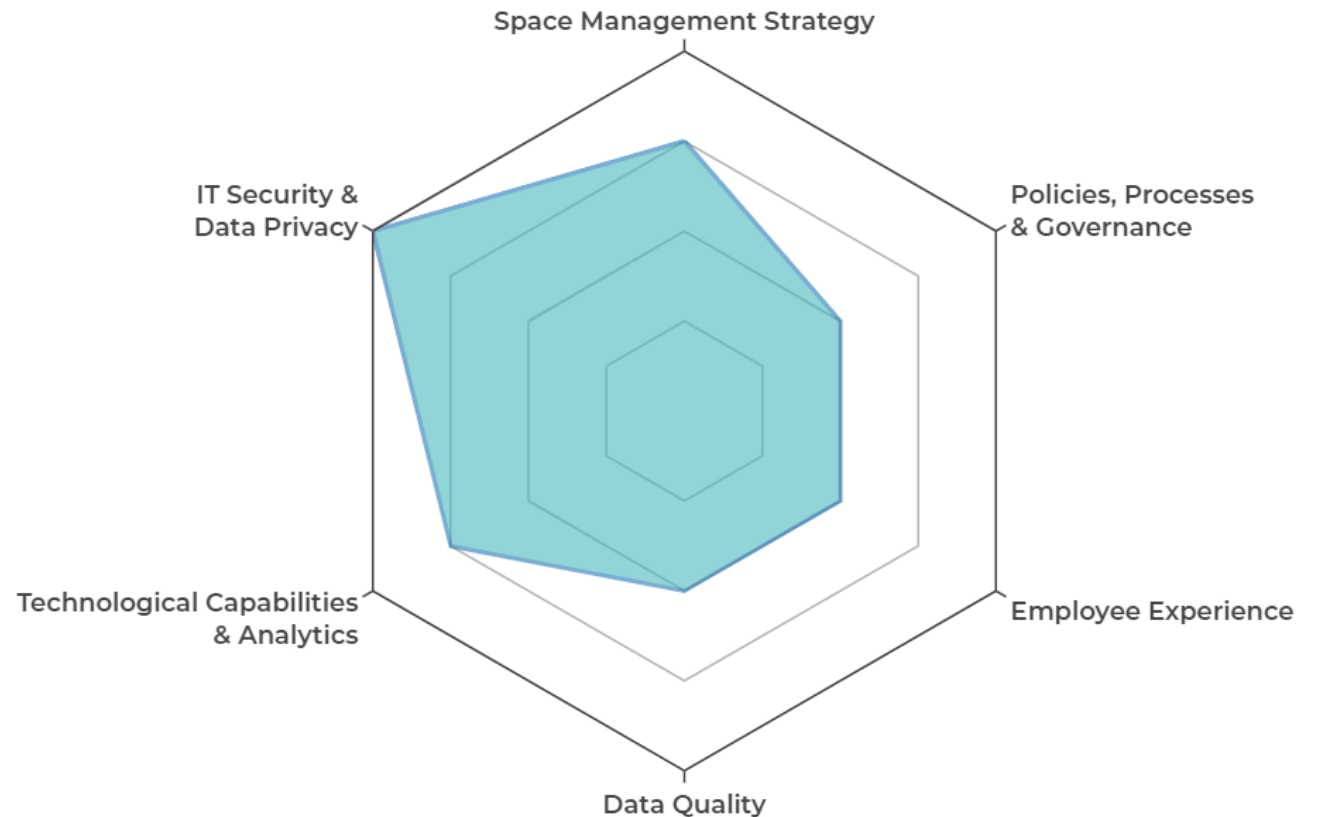
BENCHMARK WITH PEERS

Compare your scores with industry averages and learn how others are achieving successful results.

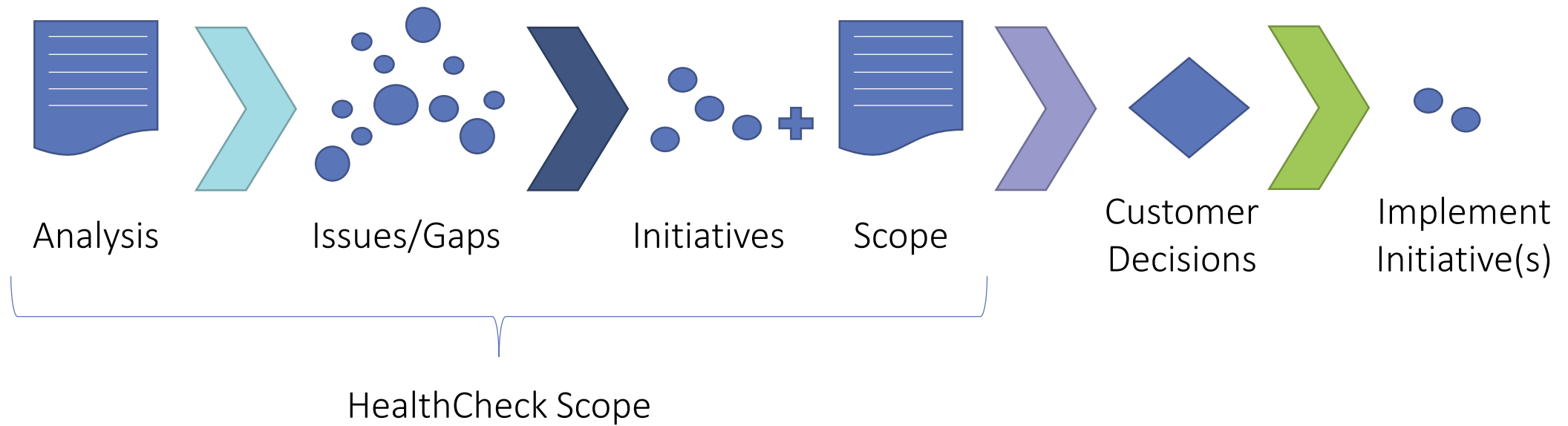


DISCUSS WITH “THE DOCTOR”

Review your results with your provider and determine how to reach your goals and decide on priorities.



Big Picture



What are some of the typical
outputs?

Maturity Assessment

Where do I Stand?

To get anywhere, we need to know where we're starting from. We apply our maturity curve to the technology, process and data measures across all the functional areas supported by FM:Interact to understand the current state.

Maturity Assessment		Client Process Maturity Rating				
		Identified	Described	Standardized	Controlled	Optimizing
Capital Projects	Capital Planning		■ 1.4			
	Project Accounting		■ 1.0			
	Project Execution		■ 1.2			
Facility Operations	Asset Management		■ 1.4			
	Condition Assessments		■ 1.0			
	Environmental Health & Safety		■ 1.0			
	Service Management		■ 1.0			
	Work Management		■ 1.4			
Real Estate	Acquisition & Disposition		■ 1.2			
	Lease Accounting		■ 1.0			
	Lease Transaction Management		■ 1.2			
	Portfolio Administration		■ 1.4			
	Property Taxes		■ 1.0			
Space Management	Strategic Planning		■ 1.2			
	Alternative Workplace		■ 1.0			
	Moves, Adds, and Changes		■ 1.2			
	Space Inventory & Occupancy		■ 1.2			
	Space Planning & Forecasting		■ 1.1			
Sustainability	Sustainability		■ 1.0			
Technology	Technology Support		■ 1.4			

Issues/Challenges

Confirming What We Heard

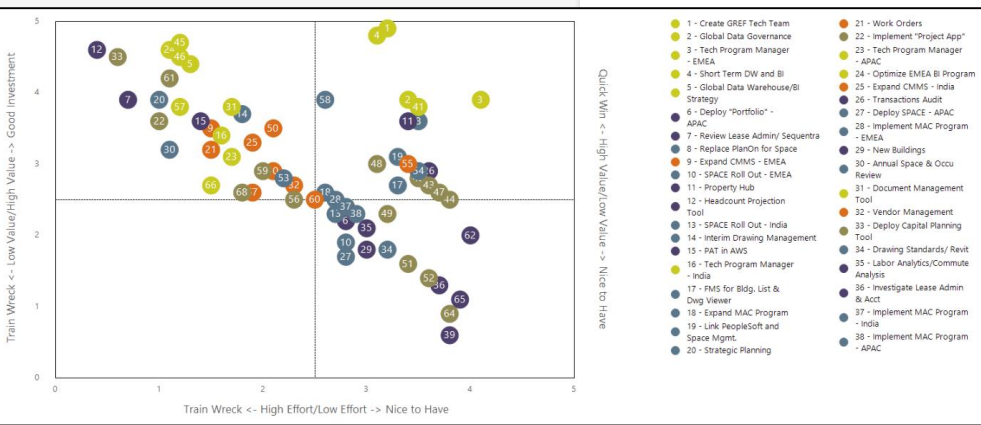
Critical to ensuring focus is applied to the proper problem areas, all issues and challenges are cataloged by functional area, workshop and the source impact of technology/process/data.

Issues/Challenges								
ID	Value Chain	Value Chain Area	Issue/Challenge	Workshop	Process	People	Tech	Data
CP-21	Capital Projects	Capital Planning	capital planning done in Excel; no long term tracking or link to asset management	APAC	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CP-22	Capital Projects	Capital Planning	use Excel; no link to asset management	India	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CP-23	Capital Projects	Project Execution	No project management software; use MS project for master project tracking; excel for project reporting, financials, and for sharing project timeline with contractors	Japan	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CP-24	Capital Projects	Capital Planning	no capital planning tool; use excel for estimates and reports as needed	Japan				<input checked="" type="checkbox"/>
FM-36	Facility Operations	Asset Management	no asset management tool	India	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FM-37	Facility Operations	Work Management	using Excel for FM reactive work orders, issues reported to JLL help desk by phone; not using SIM for TT but is getting it this year	APAC	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RE-34	Real Estate	Portfolio Administration	Portfolio planning reactive process using Excel; no system or formal process; PAT tool not used	APAC		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RE-35	Real Estate	Lease Accounting	Sequentra available but not used; No system of notification for lease events, terms, and dates	APAC		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SM-35	Space Management	Space Inventory & Occupancy	Can't access BOX and "any android" in China; Use shared AMZ folders for document sharing	APAC	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SM-36	Space Management	Space Inventory & Occupancy	no space management tools; use Excel for planning and project/ MAC support	Japan			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TS-05	Technology	Technology Support	No BI reporting or dashboards; Ad hoc reporting by request	Japan			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RE-07	Real Estate	Lease Transaction Management	Data issues, manual process	SEA/Americas Workshop	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SM-31	Space Management	Moves, Adds, and Changes	no space or MAC management tool; MAC management completed using Excel and	APAC	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Value vs. Effort

Work Smarter, not Harder

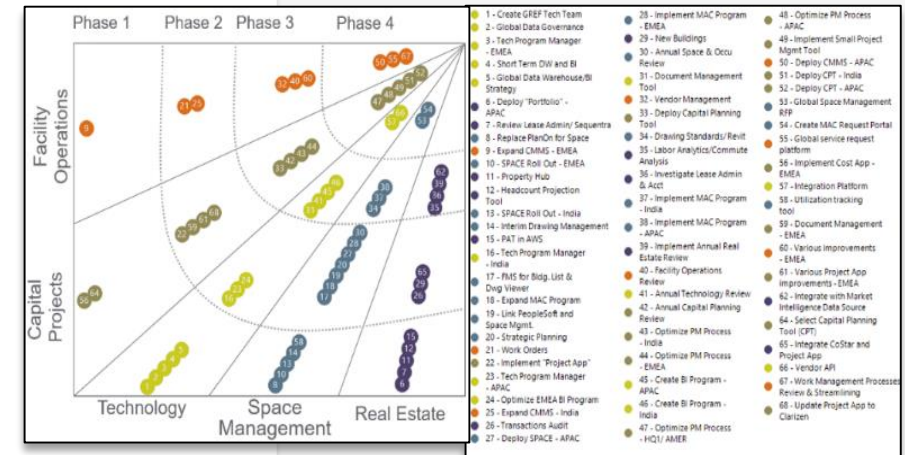
Initiatives are created directly from the issues and challenges. They are then plotted against value and effort to enable the best decisions on prioritization and sequencing.



Roadmap

How do I get to the finish line?

Knowing how to navigate the findings in an orderly and methodical way ensures traction with buy in and measurable milestones along the way.



Give away!



JLL HealthCheck

Call now! Before supplies run out!
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Use coupon code:
"JLL FM:Systems HealthCheck" to get
99.9% off your order



All payments in
Bitcoin.

Thank You!



Questions?