

# Welcome to the FM:Systems User Conference

# The FM:Systems Maturity Model

History and Evolution of Best Practices

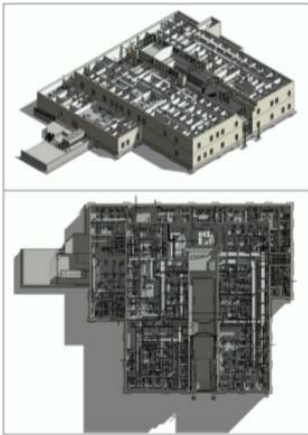
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# The Evolution of the Maturity Model

## BIM FOR FACILITY MANAGEMENT

Version 2.1



Prepared for the BIM-FM Consortium

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## Best Practices for Space Management to Maximize Your Corporate Real Estate Investments



FM:Systems

## Best Practices to Master Your Corporate Moving Process

Minimize employee downtime and increase workplace productivity

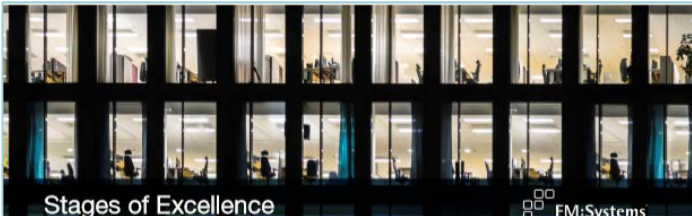


FM:Systems

# The Evolution of the Maturity Model

	A	B	C	D	E	F
1	Stages of Excellence in Space Management					
2						
3						
4	Integrated Workplace Management Systems Fundamentals	Stages of Excellence				
5		Stage 1 Challenged	Stage 2 Basic	Stage 3 Intermediate	Stage 4 Advanced	Stage 5 Leading
6		Tracking of Space Inventory and Occupancy				
7	- enterprise solution - fully integrated - occupancy knowledge - visibility to vacancies	Tracked via paper, PDF, Visio or excel files; no or limited AutoCAD drawings; challenged to keep inventory current; occupancy is unknown or typically outdated	Workgroup solution; AutoCAD drawings are utilized; no integration to HR and finance systems; visibility to others is limited or not available; occupancy is tracked manually and typically is outdated. Space is typically tracked at the department level.	Workgroup or division solution; integrated with HR and financial systems; updates occupancy via automated move management solution. Space is typically tracked at the employee and department level. Occupancy is easily tracked.	Workgroup or division solution; integrated with HR and financial systems; updates occupancy via automated move management solution. Space is typically tracked at the employee and department level. Occupancy is easily tracked.	Enterprise solution; fully integrated with HR and financial systems; automated move management solution to keep occupancy updated; full visibility to the enterprise. Space is tracked at the employee and department level. Ability to search on space related information and see detailed information and graphic of space location.
8	Management of Space Occupancy (move/add/change)					
9	- automated M/A/C - automated communications - cross-department coordination	Paper tracking; coordination internally and externally is challenged; rework activities to finalize the move	Track moves using Excel; coordination internally and externally is challenged; rework activities to finalize the move	Track moves using database and web request forms; coordination internally and externally is functional; rework activities to finalize the move.	Track moves using database and web request forms; coordination internally and externally functions well; move finalization is done through web and updated throughout.	Automated space management; fully integrated systems; automated move/add/change processes; enterprise solution with full integration and visibility. Ability to do both individual moves and project moves. Report on all important metrics.
10	Strategic Planning					
		Uses hand drawn, Excel or Visio to draw rudimentary floorplan of affected areas. Uses color markers to indicate movement	Uses AutoCAD to print out floorplans. Uses color markers to indicated movement of	Uses AutoCAD to crosshatch affected areas, track square footage and print out floorplans. May use Excel to track floors, areas, departments and headcount. Strategic	Uses AutoCAD to crosshatch affected areas, track square footage and print out floorplans. May use Excel to track floors, areas, departments and headcount. Strategic	Enterprise solution; fully integrated with AutoCAD to show space information. Integrated stacking plan allowing drag and drop capability to build scenarios and place departments within available space inside scenario. Ability to create multiple scenarios. Ability to
	Sheet1	Sheet2	Sheet3			

2008




**Stages of Excellence**

What are the Stages of Excellence?

Before you can get to where you want to go you first have to know where you are. The Stages of Excellence was developed by FM:Systems to help real estate and facility professionals evaluate where they are in terms of using software solutions to manage their space. The Stages of Excellence is meant to be used as guidelines, not mandates. After more than 30 years, FM:Systems has found that this methodology works well.

This can provide you with a solid framework for evaluating your own organization and is built upon best practices for using and implementing integrated space management software to help you manage your space more effectively. Use the stages below as a self-evaluation to see where you rate!



**LIMITED CAPABILITIES 00**

- Pre-DIVAB
- Basic information tracked through spreadsheets
- Inconsistent CAD drawings or PDFs
- Limited employee to space definition

**SPACE TRACKING 01**

- Published Floorplate
- Employee and Seating assignments
- Basic Space and Occupancy Reporting

**CATEGORIZING SPACE 02**

- Enhanced Graphic Views and Reporting
- Additional Space and Employee Information

**ACCESS AND AUTOMATION 03**

- Automated Employee Request
- User Accounts for All Employees
- Varying Permission Levels

**ADVANCED OPTIONS**

- Additional Custom Field Views
- Interoperability Between Modules and Tables
- Integrations with Other Systems

Figure 1: Stages of Excellence of Space Management

2014



# What's your Workspace Maturity? Take the Self-Assessment Now

Your people will do their best work when their environment works for them.

**If you don't really know how your workspace is managed today**, you might be missing opportunities to reduce costs, drive revenue, innovate your business and enhance your employee experience.

We commissioned Verdantix, an independent market research firm, to leverage global research and interviews with senior executives across financial services, healthcare, higher education, pharmaceuticals, the public sector, retail and telecommunications, to put together this space management self-assessment.

Once you've answered these 6 quick questions, you'll receive your score and see how you benchmark against industry peers. We'll provide actionable recommendations on steps you can take right away to improve the management of one of your most expensive assets — your real estate.

[TAKE THE ASSESSMENT](#)



# Workspace Maturity Benchmark Self-Assessment

[Take Assessment](#)



# Workspace Maturity Benchmark Self-Assessment

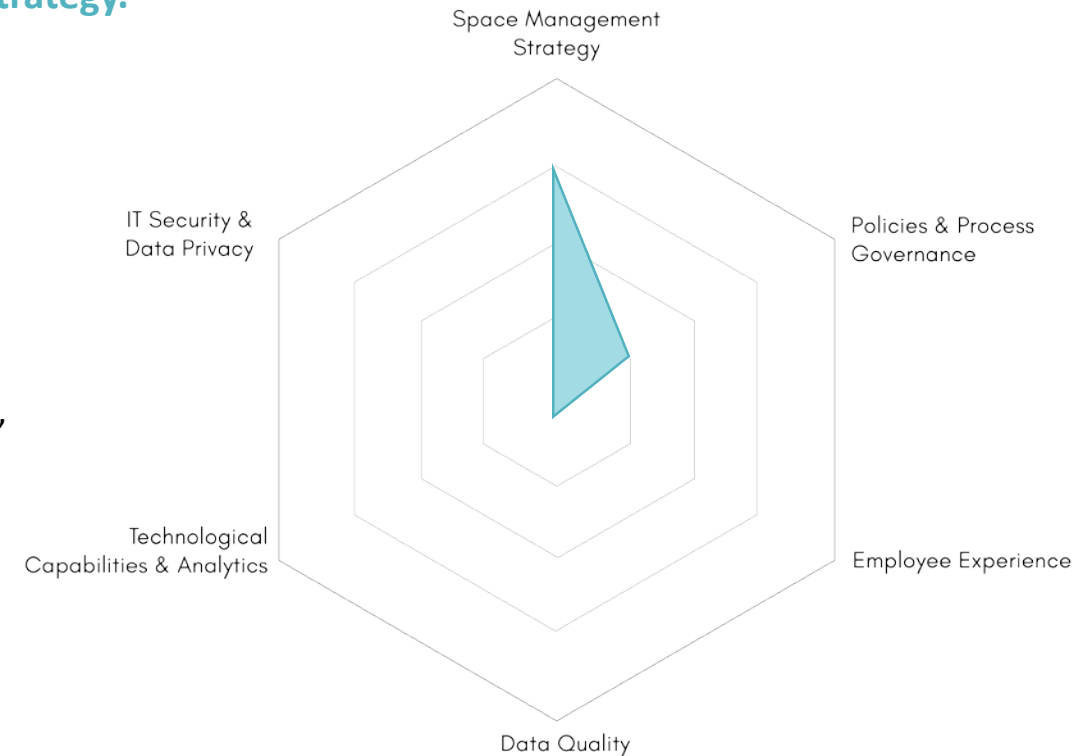
## Step 1 of 7

14%

### 1. Space Management Strategy

Please pick the option that best reflects your current space management strategy.

- ☐ **Minimal** – We have no (or almost no) plans to manage, coordinate and distribute space across our real estate portfolio. Any decisions about space usage are reactive
- ☐ **Incomplete** – We have some plans to ensure enough space to meet current needs. We report on our space usage to coordinate across departments and we have some strategies to ensure that desks are properly allocated, reducing wasted space
- ☒ **Good Industry Practice** – We have plans to maximize the efficiency of our space usage, with a variety of design options such as co-working spaces, hotelling and hot desking. We have detailed space usage reporting and analysis on a regular basis, and more granular insights on utilization metrics for major sites.
- ☐ **Best-In-Class** – We have plans to optimize our space usage for efficiency, employee wellbeing and productivity. We have moved, or are moving, to an agile workspace model to promote flexibility. We forecast supply and demand, and use it to determine the technology we'll need to keep up with changes. We perform comprehensive usage reporting and analysis, with many granular insights that drive improvements



Next

# Workspace Maturity Benchmark Self-Assessment

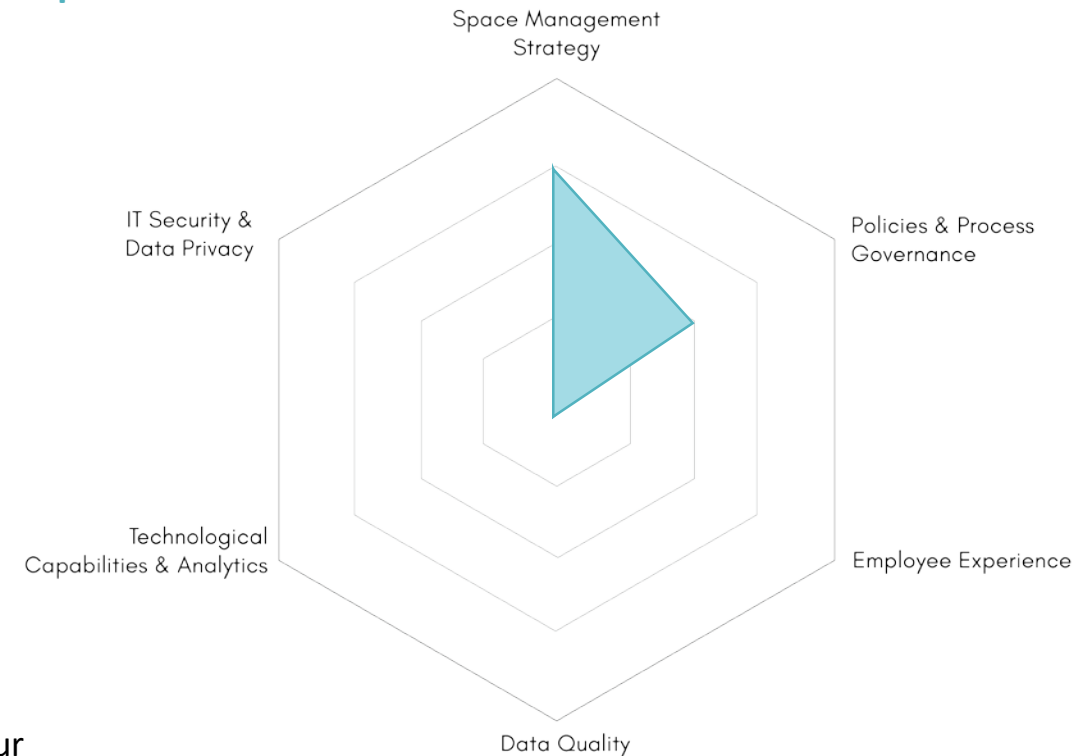
## Step 2 of 7

14%

## 2. Policies & Governance

Please pick the option that best reflects your current policies, processes and procedures.

- ☐ **Minimal** – We don't have a way to promote adherence to best practices for space efficiency. We have few or no policies, processes or procedures to enable consistent space usage data capture.
- ☒ **Incomplete** – We have some stakeholder involvement in capturing space usage data and promoting adherence with best practices. But there is little consistency in data capture across our portfolio. We aren't clear on how to define adherence to practices; for example, how long a hot desk should be allocated or how often data should be captured at site level.
- ☐ **Good Industry Practice** – We have a clear roster of leadership in charge of managing space across most of our sites, who help us follow best practices. We have consistent policies on capturing space usage data across our portfolio, and ways to track adherence to best practices. This could include RFPs for room booking software to limit the amount of time or size of rooms that staff can book.
- ☐ **Best-In-Class** – We have extensive collaboration and communication on policies, processes and procedures around space management across multiple stakeholders. Our policies are consistent and reviewed at least annually. We have ways to track adherence, with flexibility at the local level to account for differing needs by department



Next

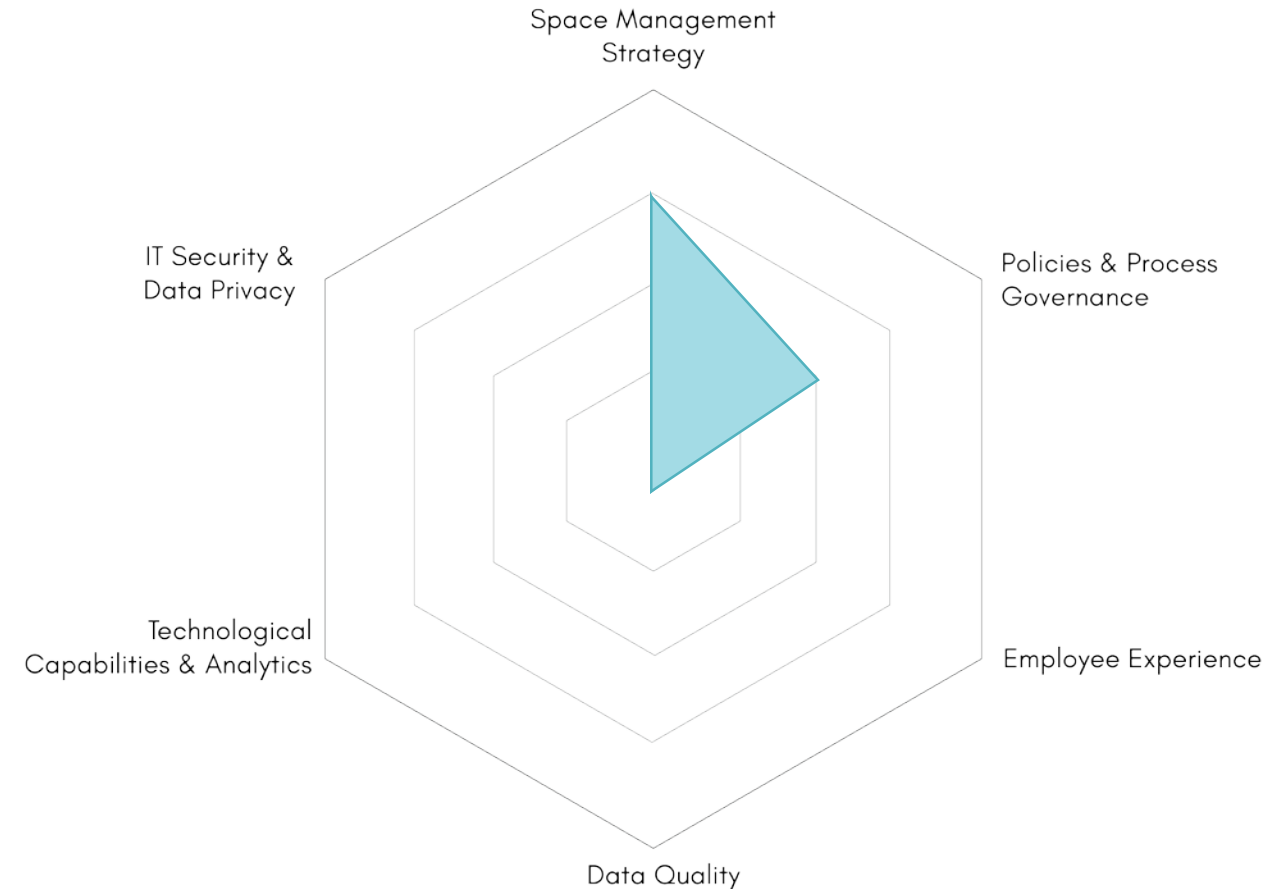


# Workspace Maturity Benchmark Self-Assessment

Your Total Score: 16

## Congratulations!

You've completed the Space Management Self-Assessment. See your results below as well as recommendations for how to innovate your process. Check your email for a detailed report and to find out how you stack up against your peers.



# Workspace Maturity Benchmark Self-Assessment

## Recommendations

### Policies & Governance

#### Good Industry Practice

Establish a clear hierarchy of control for office staff, backed with clearing space and huge gains are still available. As we lag providing sufficient estate to meet responsibility to all of the director's, to optimize space develop strategic objectives to forecast and match future capacity. This requires linking space BPA for new business growth to cut down on waste. This, you space and comprehensive reporting and the portfolio understand where space is available and where small pockets of waste are appearing.

Your Score

2



Questions?



# Contact Us



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