



Information is crucial but are we going the right way about using it? Paper systems struggle with volume and Cafm can lead to frustration whenever it's purchased in haste

# Don't despair, prepare

**If we want** to achieve full value from one of the most important advances since the birth of facilities management, we need to understand what FM software can do for us and identify the right Cafm system for our needs.

Cafm applications help plan, monitor and manage property, space and assets, streamline the management and planned maintenance of buildings and services, control resources and run a help desk to handle reactive maintenance.

FM software users report cost and time savings and much tighter financial control. They say systems give more meaningful information for improved decision making, and all-important health and safety compliance. But Cafm can generate delays and frustrations because systems have been purchased with insufficient forethought.

## 1 Assessing benefits

The levels and thresholds at which adopting FM software becomes cost effective are different in each business situation. So you will need to consider factors such as current and projected scale of business, workload volumes, efficiency and success levels.

By now you'll be into the detail of what Cafm systems can offer and what you need. So you'll need to compare current functionality and cost with required functionality and its cost, weigh your budget up and decide whether the payback period seems acceptable.

Working practices may have to adapt, and you will certainly want to reassess reporting. IT issues need serious consideration including user licences, access levels, and web or remote access. Think too about whether the new system can offer the growth and scalability you'll require in the future.

Payment options include a one-off cost for a perpetual software licence, possibly involving a leasing agreement, an annual software cost paid on a rolling basis, or outsourcing server hosting to a specialist provider.

When preparing the financial case,

look three or four years ahead, and don't compromise long-term profitability by cutting corners. Compare the total cost of ownership with the total expected financial savings, typically aiming for a two to three year return on investment.

## 2 Invitation to tender

Having made the financial case, if you choose to you can create an Invitation to Tender. Selection should involve checking vendors' financial stability and experience with your market sector. Ask for a project plan demonstrating understanding of your requirements. Ownership of the source code is a bonus, while full technical support, project management and post sales support are crucial. Check also future development plans, the mechanism for escalating issues, and the willingness to accept customisation change requests to the software.

## 3 Implementation

The implementation plan is vital for timely delivery, so be clear about the stages you need to consider and the order in which this must run. By comparing tenders with stated requirements and ascertain which supplier/software is the

most appropriate to your needs. When placing the contract include timescale and KPIs and establish a project team. Import existing data into new software and run pre-installation checks. Next, check interfaces into third party applications are working before testing, commissioning and signing off. Finally, ensure you train system users and administrators before the ultimate step – going live.

Ensure hardware, data, staff and IT support are available in time, and take an active role in implementing the system, and you'll have done the best you can to ensure success for this exciting new FM tool.

## 4 Training

Adequate time and resource for training is vital for success. You'll want a training plan with clearly defined training outcomes and free documentation, an in-house database on which users can practice. You might also consider first a 'train the trainer' programme.

## 5 Summary

Information is arguably the most valuable resource for facilities management departments, so it's crucial to have a process that allows you to gain full value from it and move the organisation on from vulnerable paper process.

Finally, some key points to remember: document the current business processes; recognise potential improvements; map the risk management processes; define the reporting requirements; decide upon levels of integration with other products; consider various payment/provision options; include all costs and savings in the financial case; examine the potential vendor's overall package and experience; be aware of the future enhancements; agree the supplier timescales and KPIs; take an active role in implementation; and, importantly, commit time to the thorough training of the staff involved. **FM**

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## Getting a handle on what Cafm can offer

- help desk
- service and schedule
- wireless technology to track jobs
- contract management
- health, safety and risk management
- stock control and purchasing
- asset and property management
- meeting and conference room diary
- manage parking, transport and visitors
- full reporting capabilities and audit trails
- 24/7 web-based solutions
- PFI/PPP payment mechanism
- interface with BMS or other devices
- electronic signage and RFID tagging
- integration with third party applications