

# LEADING TECHNOLOGIES IN FM: THERE'S AN APP FOR THAT!

PRESENTED BY:



Genentech





# INTRODUCTIONS

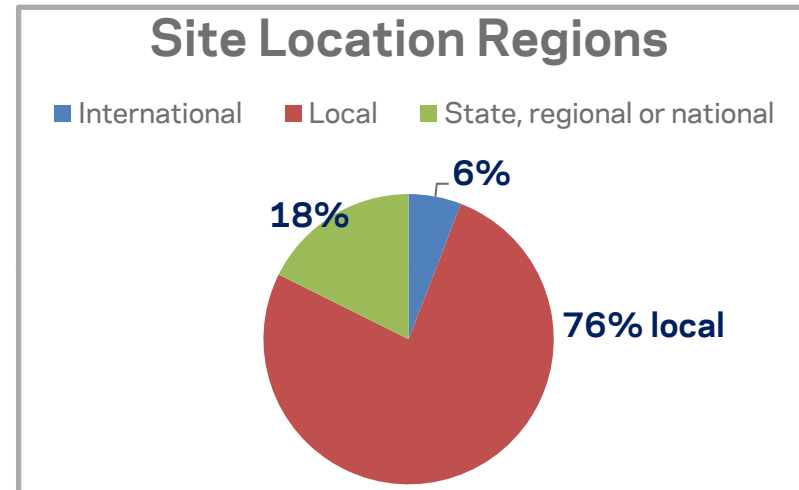
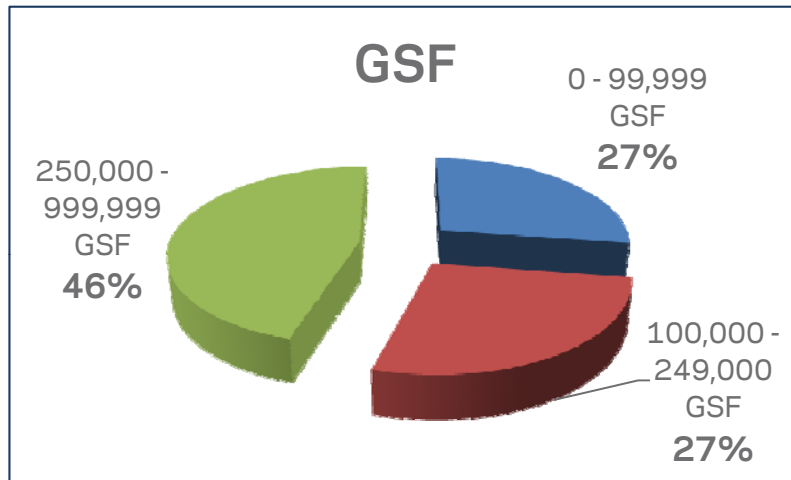
- Panelists
- Audience Questions
  - Audience background, how many are...
    - Facility planners
    - Deal with MAC's?
    - Operations & Maintenance
    - Real Estate: leasing or strategic planning
    - IT
    - Other (looking for free food and drinks)
  - Who uses IWMS now?
  - Who doesn't know what IWMS is?



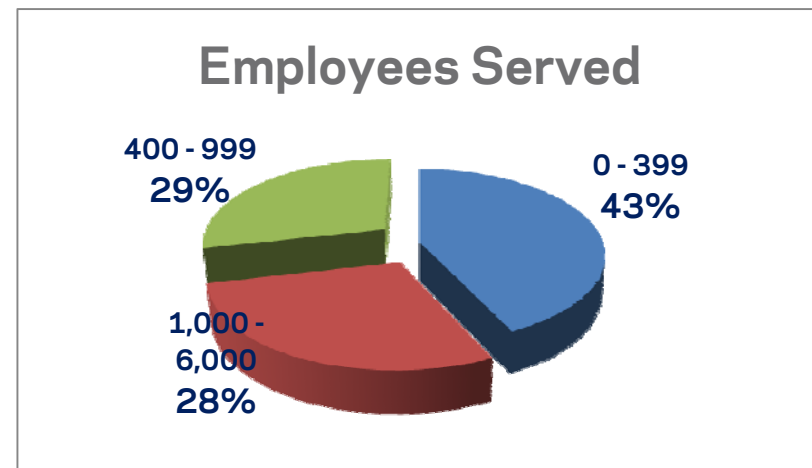
## PROPOSED AGENDA

- Introductions
- Survey Results
- Overview of IWMS / CAFM
- IWMS / FM issues to consider
- IWMS Selection Process
- Executive support and funding
- Lessons learned – Client, Consultant and Vendor view
- Wrap up and questions.

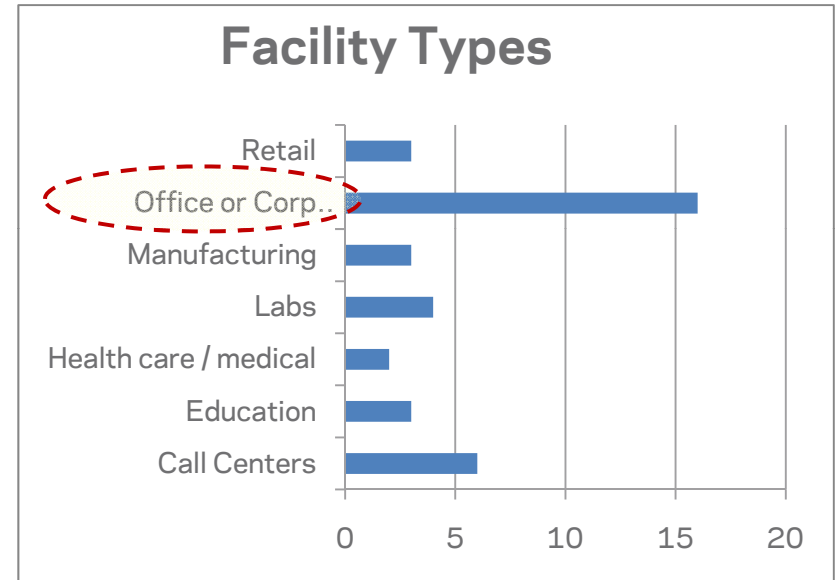
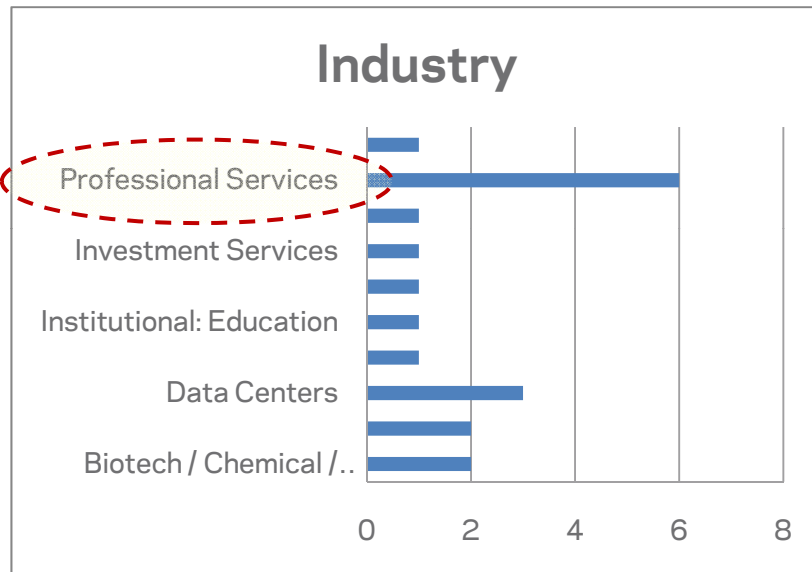
# SURVEY RESULTS: COMPANY PROFILES



**87%** of respondents manage their own facilities without outsourced help

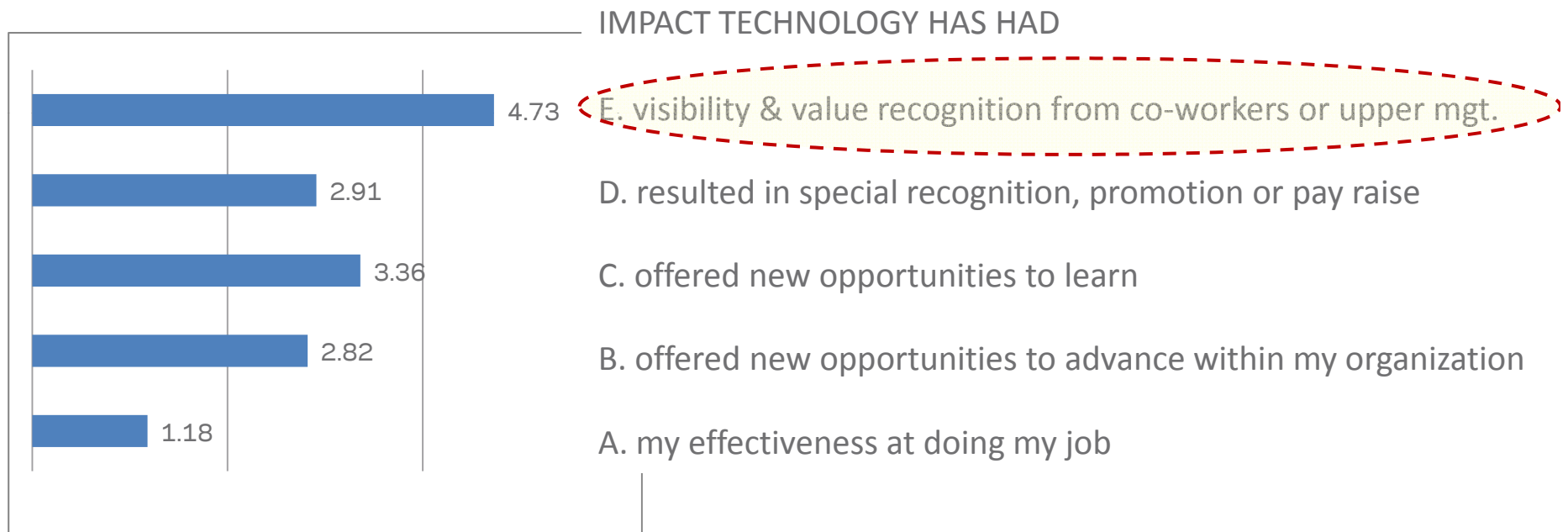


# SURVEY RESULTS

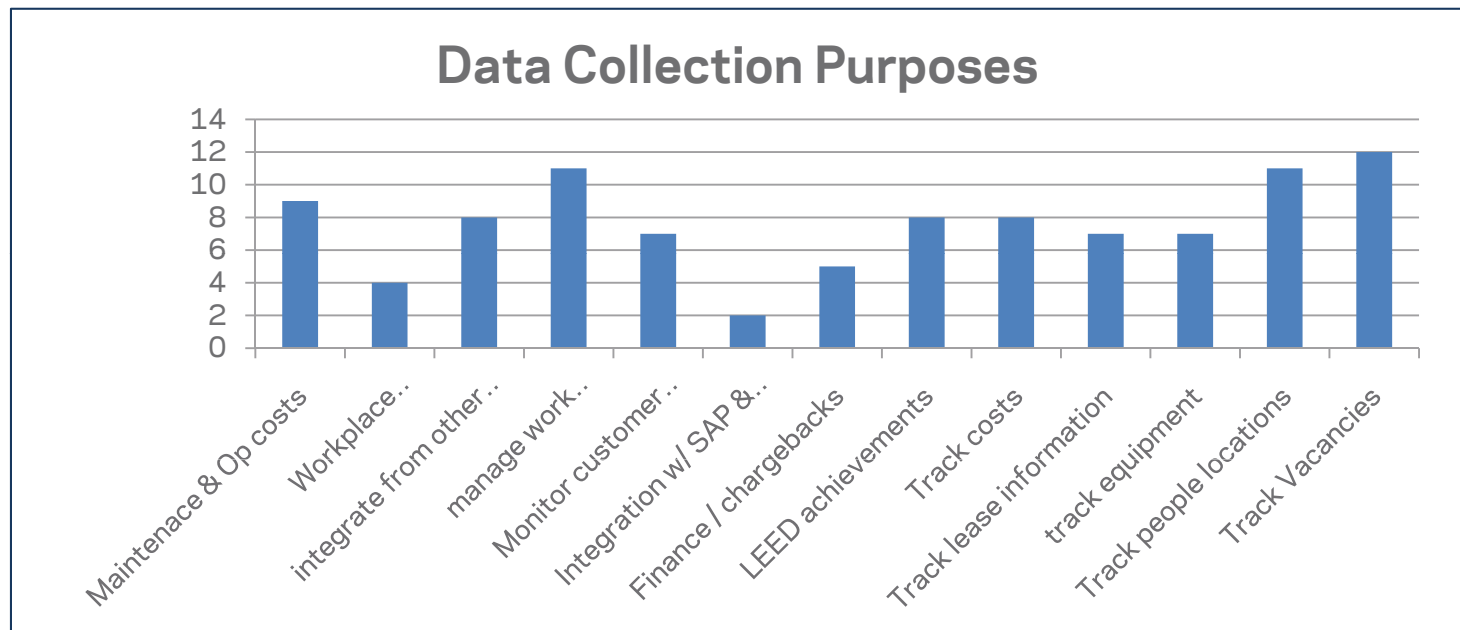


25% lease more  
than 85% of their facilities

# SURVEY: IMPACT ON TECHNOLOGY



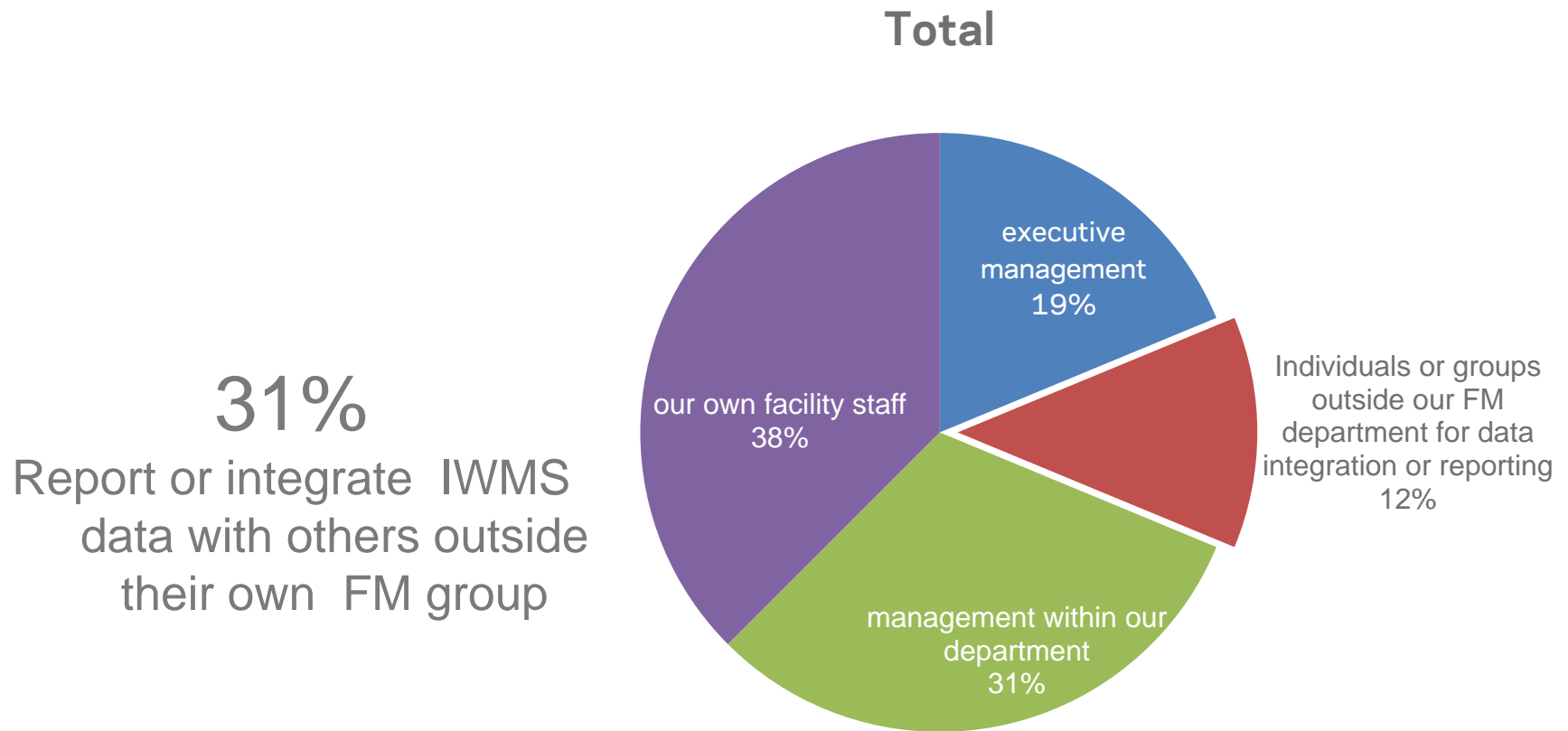
## SURVEY RESULTS: DATA



## TOP THREE RESPONSES:

1. Track Vacancies & People
2. Manage Work Requests
3. Maintenance & Op Costs

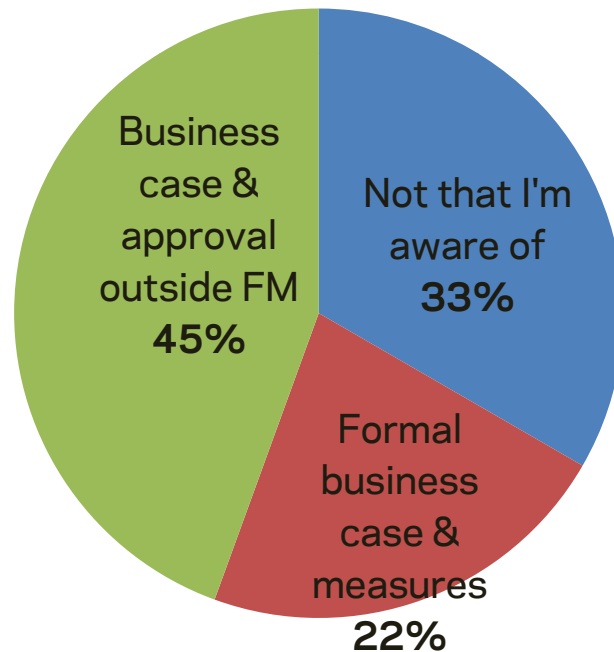
## SURVEY RESULTS: WHERE IS IWMS USED?



# SURVEY RESULTS: BUSINESS CASE

## Business Case Requirements

**66%**  
are required to  
present a  
business case  
that requires  
approval outside  
their department



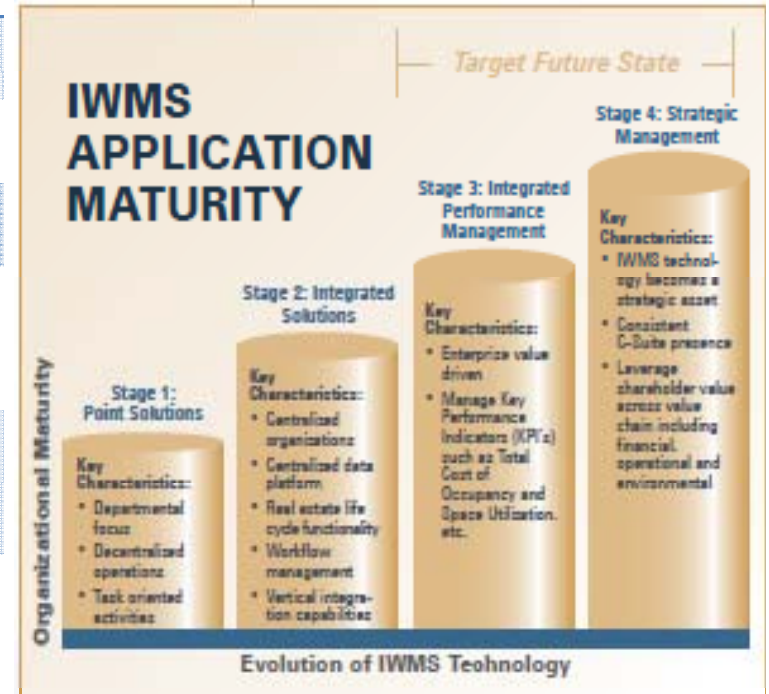
## Comments:

- I find that people tend to underestimate the effort required to maintain data and ensure ongoing accuracy.
- More time and effort than you think is required to create appropriate reports.
- Implementation and training are the biggest challenges

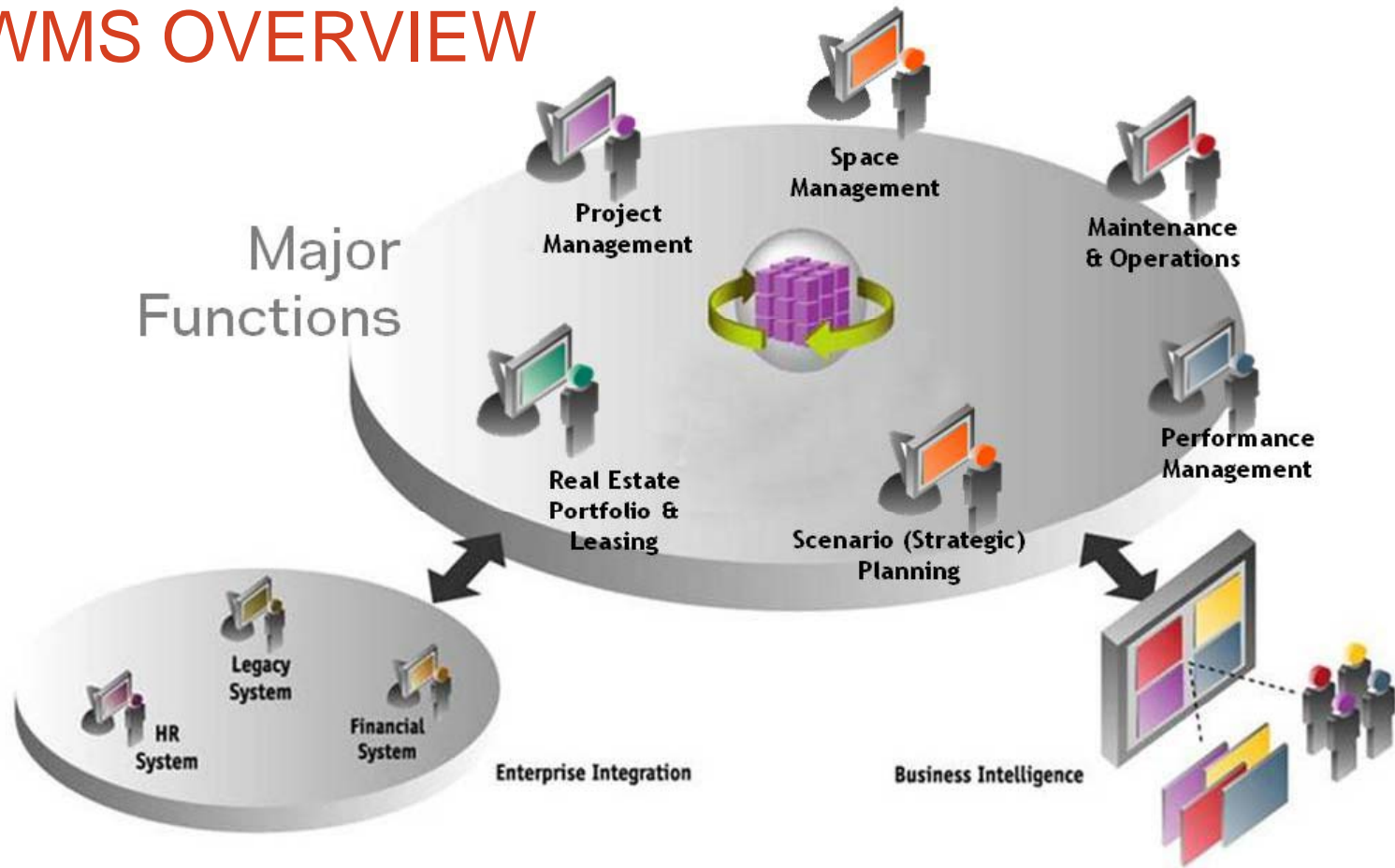
# IWMS EVOLUTION

## FM Maturity: Continuing developments ....

CAFM	=	1970's
IWMS	=	1995
IWMS + Workflow	=	2000
IWMS + Workflow + Financial	=	Now
IWMS + Workflow + Financial + GIS	=	Cutting Edge
IWMS + Workflow + Financial + GIS + BIM	=	Bleeding Edge



# IWMS OVERVIEW



**Integrated Workplace Management System** is an enterprise platform that supports the planning, design and management of an organizations physical asset base

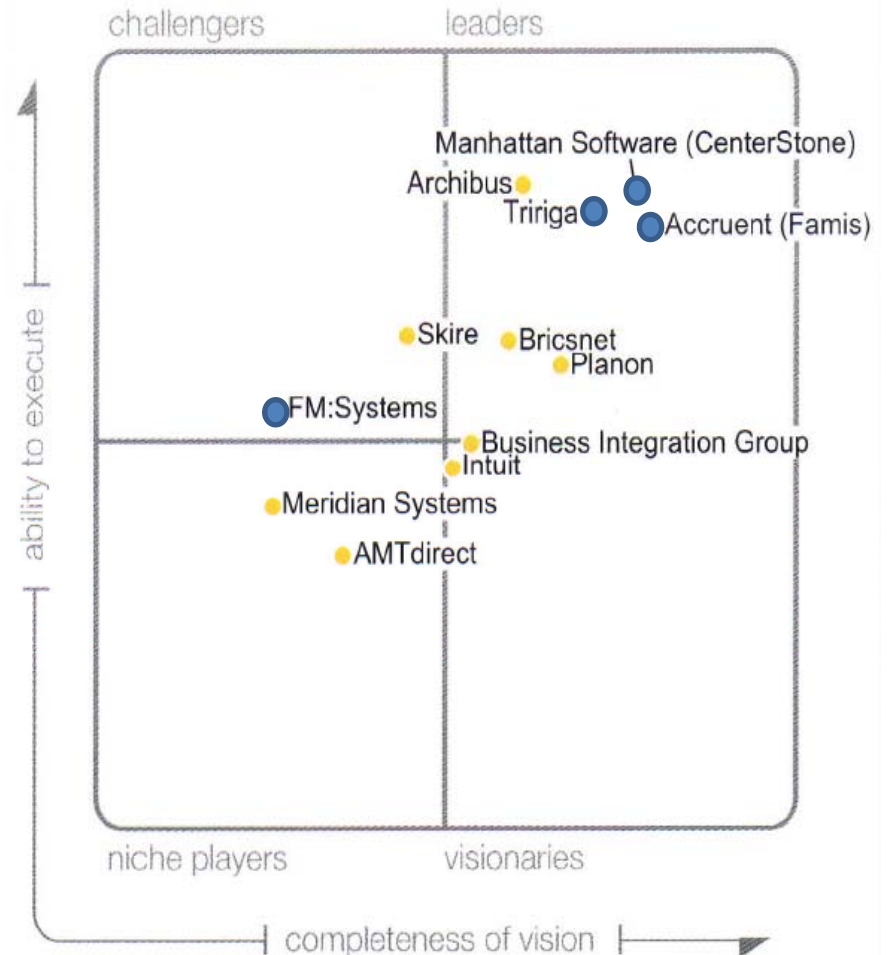
# IWMS SOLUTIONS & INTEGRATION

## ERP Systems

- Contracts
- Financials
- HR
- Supply Chain Management
- CRM
- Reporting Dashboard

## Integrated Workplace Management Systems:

Where does Real Estate and Facility Management fit in?

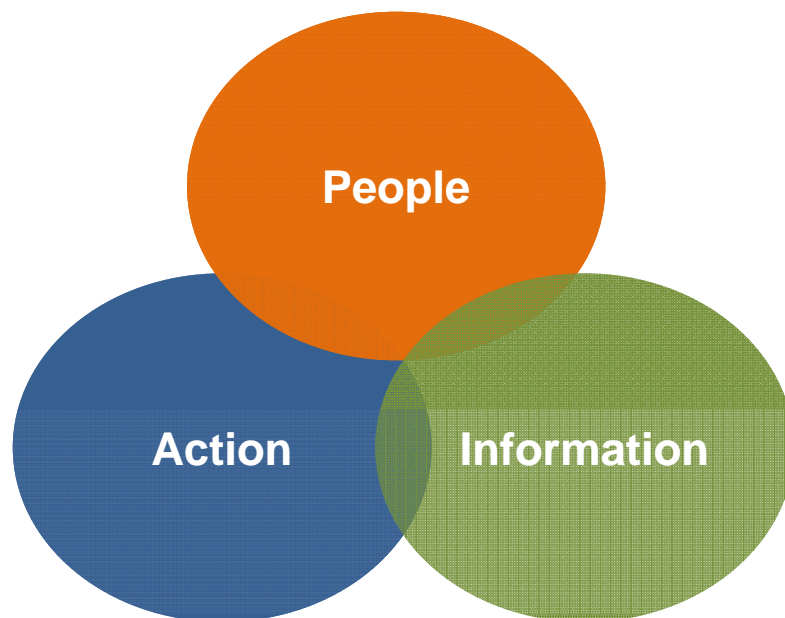


Gartner Magic Quadrant

As of July 2008

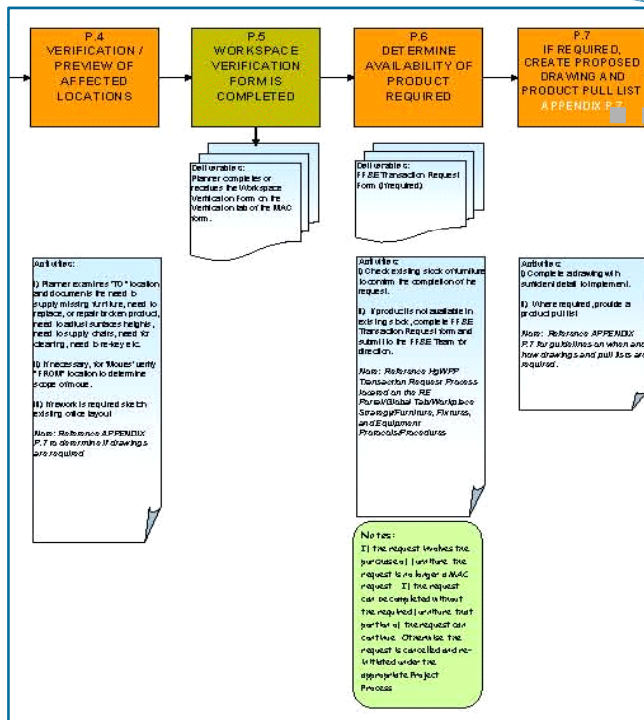
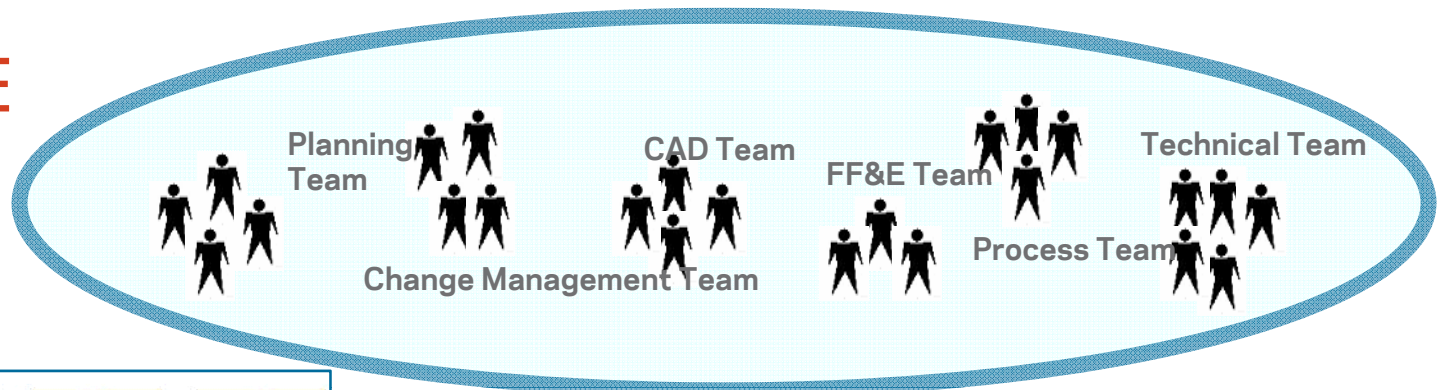
## SUCCESSFUL IMPLEMENTATION

The **value in technology** and its successful implementation by integrating **three distinct but related dimensions**

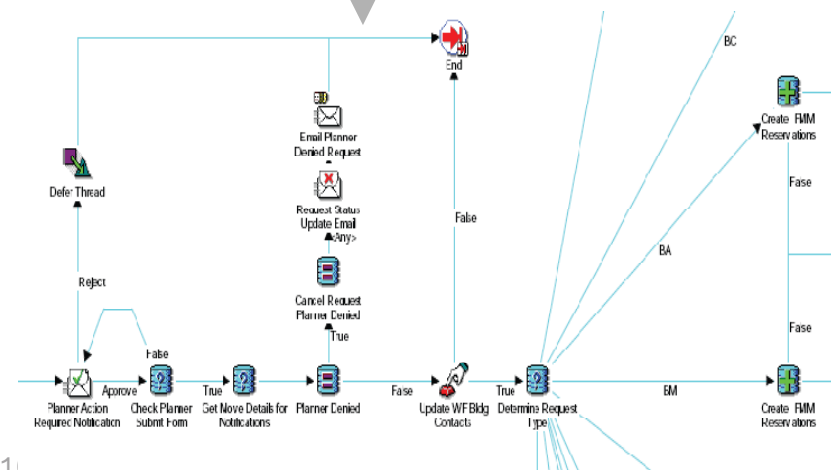


**= RESULTS**

# PEOPLE

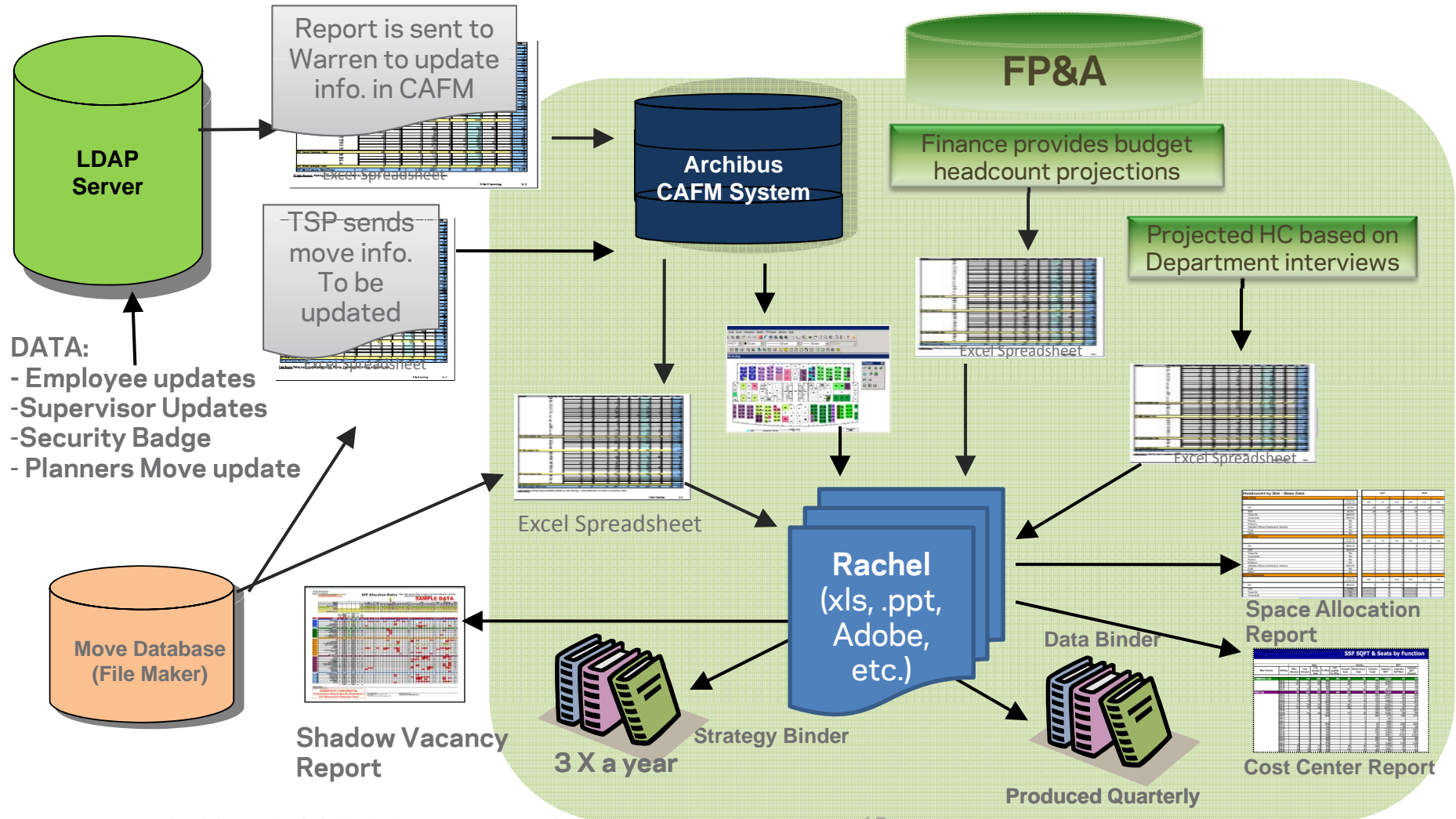


## Business process team



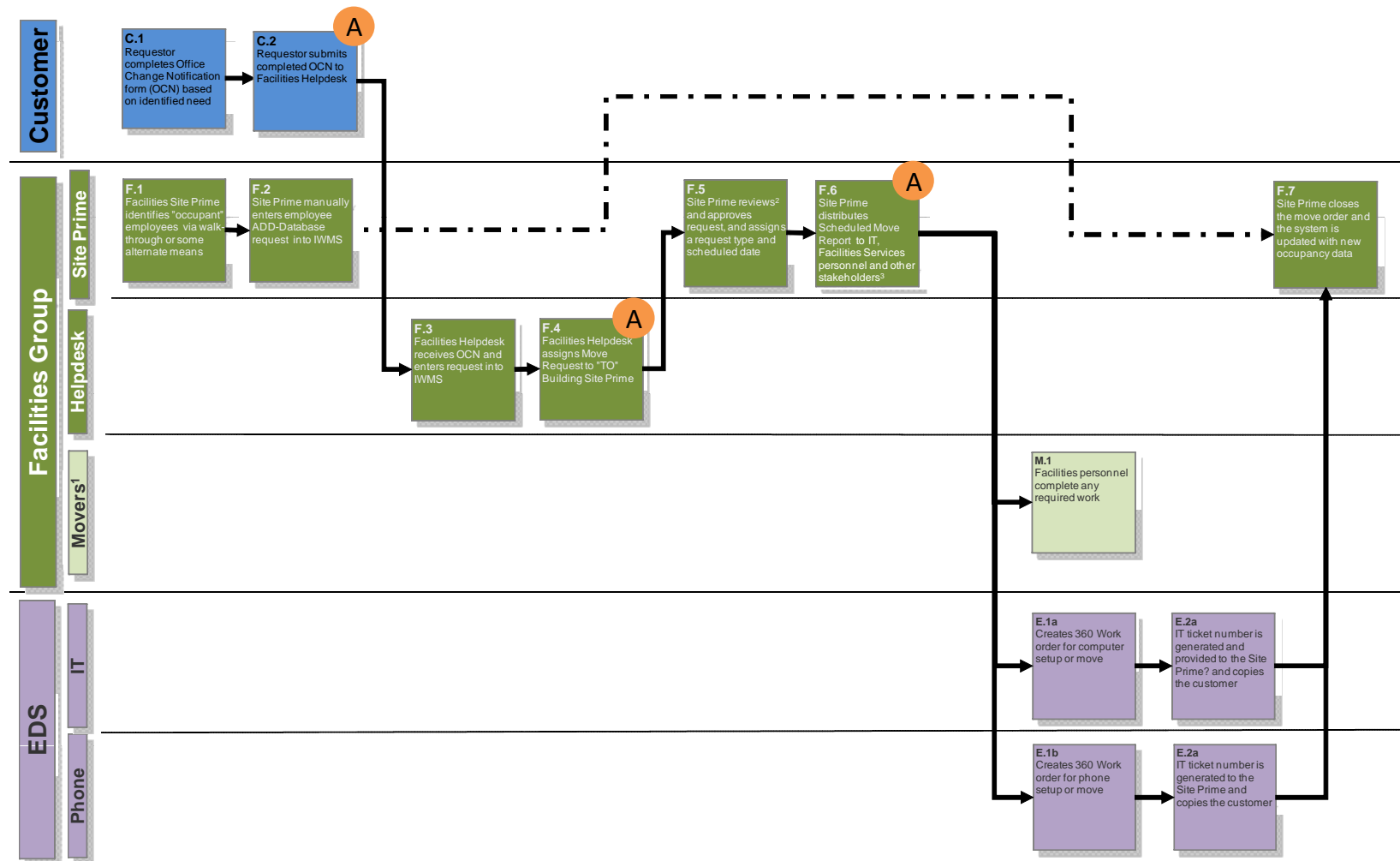
# INFORMATION

## Understanding Existing Data Flow



- DATA:**
- Employee updates
  - Supervisor Updates
  - Security Badge
  - Planners Move update

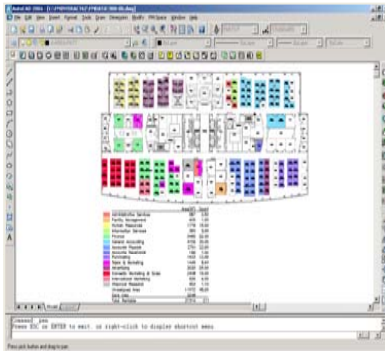
# BUSINESS PROCESS (ACTION)



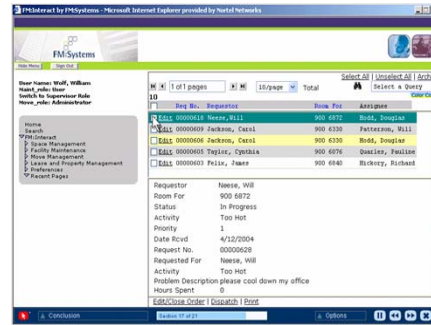


# WHAT ARE THE **BENEFITS?**

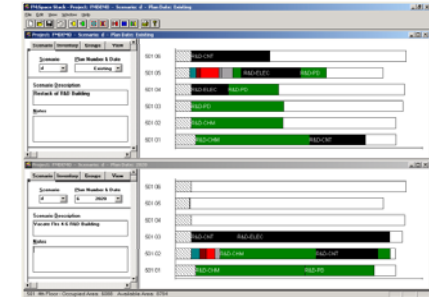
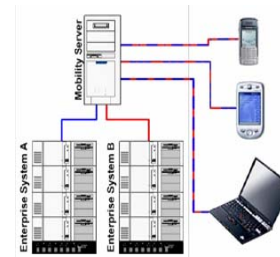
# PROACTIVE VERSUS REACTIVE MANAGEMENT



Analyze Space Efficiency



Operations & Maintenance

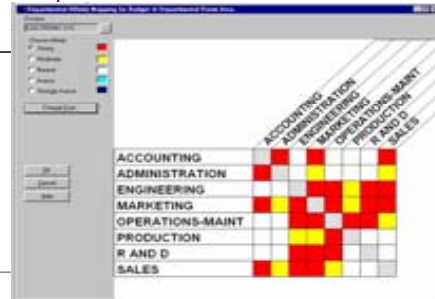


Interactive stacking scenarios

FM-Systems, Inc.  
Facility Management Database  
All Spaces by Type

03/04/04  
Page 5

ADMINIS	Information Services	Space Std	Rqd Area(SF)	2003	2004
<b>Personnel Space</b>					
DIR-AS	Assistant Director	180	180	180	180
DIR-AS	Assistant Director	180	180	180	180
MGMT-TRN	Management Trainee	150	150	150	150
MGR	Manager	150	150	450	450
MGR	Manager	150	150	600	600
SEC-EX	Executive Secretary	96	96	288	288
SEC-EX	Executive Secretary	96	96	96	96
PRGMR-1	Programmer 1	96	96	96	96
TECH-1	Technical Staff T1	96	96	288	288
PRGMR-1	Programmer 1	96	96	288	288
TC-ANLST	Technical Analyst	96	96	324	324
PRGMR-2	Programmer 2	96	96	324	324
SEC-DP	Department Secretary	64	64	128	128
TECH-2	Technical Staff T2	64	64	128	128
CLERK-1	Clerk Grade 1	64	64	128	128
CLERK-2	Clerk Grade 2	48	48	48	48
<b>Subtotal</b>			1,722	3,816	
<b>Subtotal Assignable Area</b>					
			1,722	3,816	
<b>Secondary Circ.</b>					
			45%	45%	
			775	1,717	
<b>Total Usable Area</b>					
			2,497	5,533	



Space forecast reporting

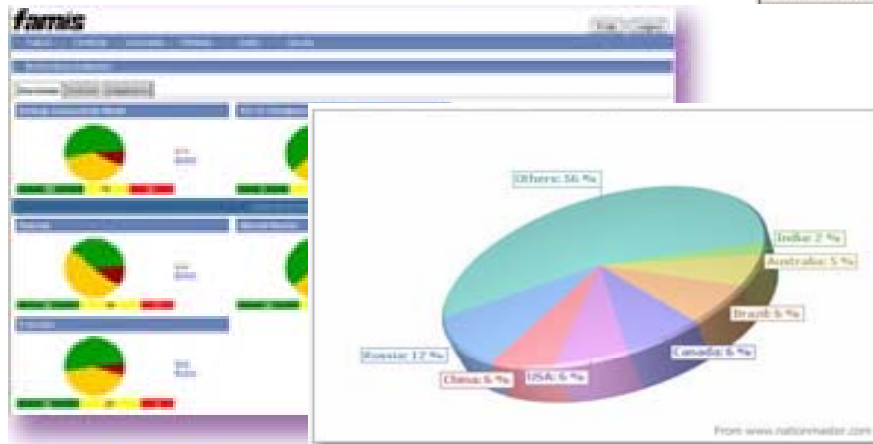
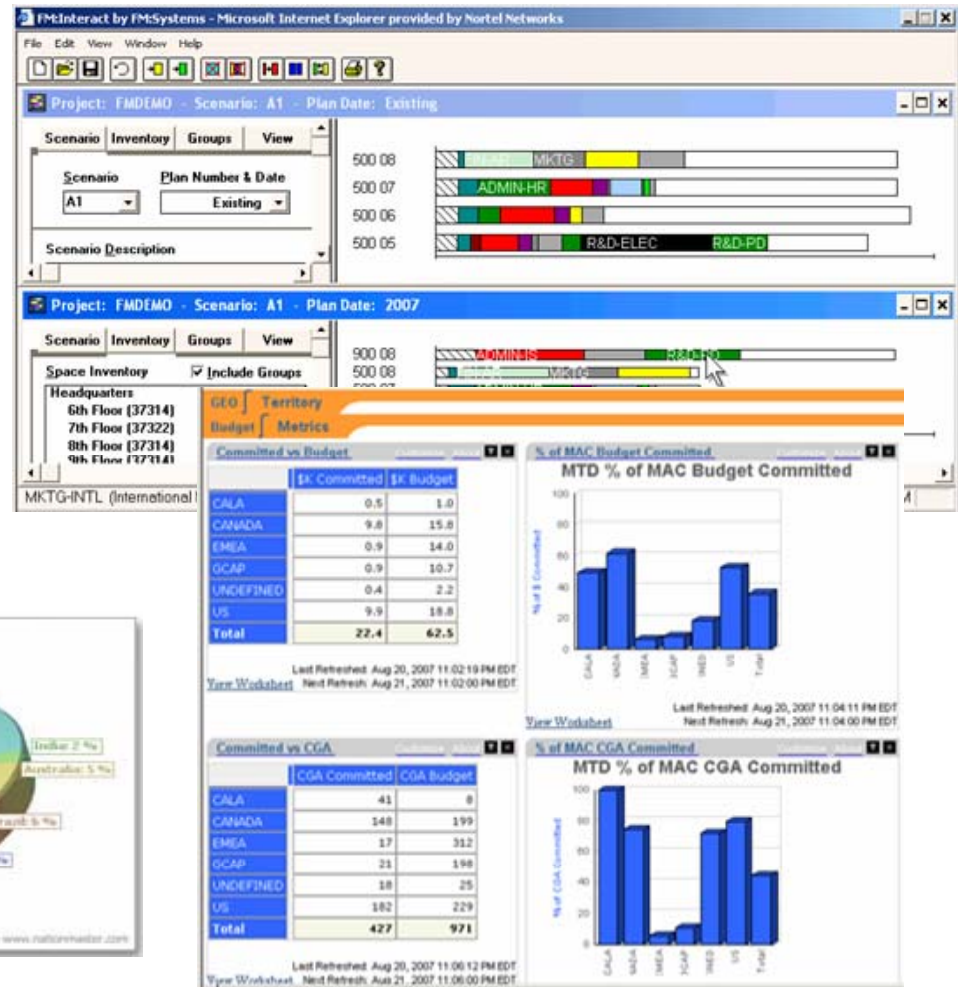
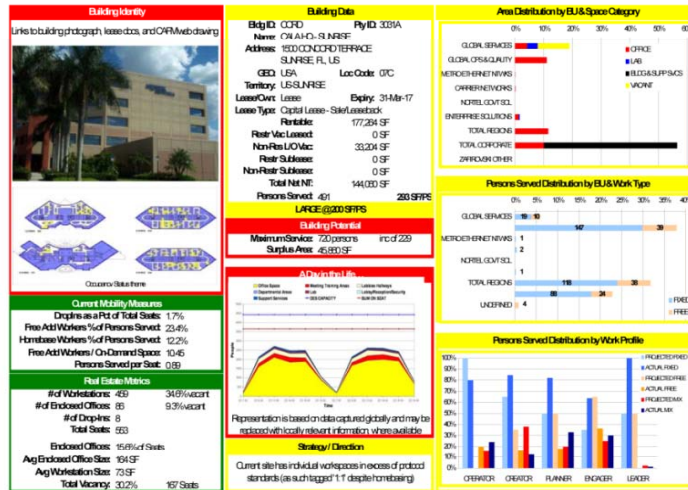
Project	Move ID	Employee to Move	Department	From Room
All	00000268	Wesley, Maxia	FIN-PR	500 7811
	00000267	Callihan, Debra	INTG	900 4014
	00000266	Crey, Rosalind	ADMIN-HR	900 6262
	00000265	Bell, Terry	ADMIN-HR	900 6256

Employee to Move West, Joann  
 Department FIN-PR\_Purchasing  
 From Room 500 7S05  
 To Room  
 Move Project MPO00002\_Admin Services Move  
 Move Date 9/30/2003  
 Move ID 00000271  
 Move Type  
 Reason for Move DEPARTMENT\_Departmental  
 Status  
 Comments

Move planning & communication



# DASHBOARDS / PERFORMANCE MANAGEMENT



# IMPLEMENTATION: WHAT'S INVOLVED?





## DO I NEED A CONSULTANT?

- Vendor
- Alliance Partner of the Vendor
- Independent Consultants
- In-house IT, RE and FM staff
- Blend of some or all

# SELECTION: RFP

- Vendor & Services Information
- Organization objectives
- Functional Requirements
  - General Software Functionality (including User Friendly Interface)
  - Components Desired
  - CAD Functionality
  - Reports
- Technology Requirements
- Pricing

## RFP Specifications

**HKGHK 04**  
As of: 10/21/2005@1:53 PM

DATA	Source Contact	Comments
Employee Names and Unique Identifier (Employee ID?)	County's Directory / HR / Public Works	Does not always include temps or contractors. IWMS will identify missing names and Directory will add updated information from IWMS. Public Works will field verify to gather missing information, including vacancies.
Department assigned, telephone numbers, etc.	County's Directory / HR / Public Works	Does not always include temps or contractors. IWMS will identify missing names and Directory will add updated information. Location can be provided by IWMS and fed back into the County Directory. Public Works will field verify to gather missing information.
Property Profile Information *	The County	FCIS written in FoxPro.
Drawing Name	HOK	Use FCIS? HOK to review options with the County
ACAD backgrounds	FCIS	Includes building exterior & core for Owned buildings. HSA buildings may have more information but likely not in AutoCAD format.
Polyline Spaces	HOK / the County	Follow BOMA standards and IWMS layering standards. Many floors need inventory verification.
Room Number	FCIS	HOK or SMC to fill in the missing numbers from the new rooms added to the plan.

**NetApp Move Management Process Ver 5 10-27-2008**

The flowchart details the process from Request/Info to Move Complete, involving steps like 'Request and Submit to Request', 'Requesting Manager', 'Requesting Manager 1', 'Requesting Manager 2', 'Requesting Manager 3', 'Requesting Manager 4', 'Requesting Manager 5', 'Requesting Manager 6', 'Requesting Manager 7', 'Requesting Manager 8', 'Requesting Manager 9', 'Requesting Manager 10', 'Requesting Manager 11', 'Requesting Manager 12', 'Requesting Manager 13', 'Requesting Manager 14', 'Requesting Manager 15', 'Requesting Manager 16', 'Requesting Manager 17', 'Requesting Manager 18', 'Requesting Manager 19', 'Requesting Manager 20', 'Requesting Manager 21', 'Requesting Manager 22', 'Requesting Manager 23', 'Requesting Manager 24', 'Requesting Manager 25', 'Requesting Manager 26', 'Requesting Manager 27', 'Requesting Manager 28', 'Requesting Manager 29', 'Requesting Manager 30', 'Requesting Manager 31', 'Requesting Manager 32', 'Requesting Manager 33', 'Requesting Manager 34', 'Requesting Manager 35', 'Requesting Manager 36', 'Requesting Manager 37', 'Requesting Manager 38', 'Requesting Manager 39', 'Requesting Manager 40', 'Requesting Manager 41', 'Requesting Manager 42', 'Requesting Manager 43', 'Requesting Manager 44', 'Requesting Manager 45', 'Requesting Manager 46', 'Requesting Manager 47', 'Requesting Manager 48', 'Requesting Manager 49', 'Requesting Manager 50', 'Requesting Manager 51', 'Requesting Manager 52', 'Requesting Manager 53', 'Requesting Manager 54', 'Requesting Manager 55', 'Requesting Manager 56', 'Requesting Manager 57', 'Requesting Manager 58', 'Requesting Manager 59', 'Requesting Manager 60', 'Requesting Manager 61', 'Requesting Manager 62', 'Requesting Manager 63', 'Requesting Manager 64', 'Requesting Manager 65', 'Requesting Manager 66', 'Requesting Manager 67', 'Requesting Manager 68', 'Requesting Manager 69', 'Requesting Manager 70', 'Requesting Manager 71', 'Requesting Manager 72', 'Requesting Manager 73', 'Requesting Manager 74', 'Requesting Manager 75', 'Requesting Manager 76', 'Requesting Manager 77', 'Requesting Manager 78', 'Requesting Manager 79', 'Requesting Manager 80', 'Requesting Manager 81', 'Requesting Manager 82', 'Requesting Manager 83', 'Requesting Manager 84', 'Requesting Manager 85', 'Requesting Manager 86', 'Requesting Manager 87', 'Requesting Manager 88', 'Requesting Manager 89', 'Requesting Manager 90', 'Requesting Manager 91', 'Requesting Manager 92', 'Requesting Manager 93', 'Requesting Manager 94', 'Requesting Manager 95', 'Requesting Manager 96', 'Requesting Manager 97', 'Requesting Manager 98', 'Requesting Manager 99', 'Requesting Manager 100'.

Rooms labeled on plan
Building Common, Floor Common, Assignable area, Service, Office, Warehouse, Workstation, Conference Room, Private Office
Occupied, Vacant, Vacant/Reserved
Count of occupants in a space
Number of occupants a space is designed for
----- (5 digits) is Unique
Tracked in IFIS, managed in cost accounting system

# EVALUATION

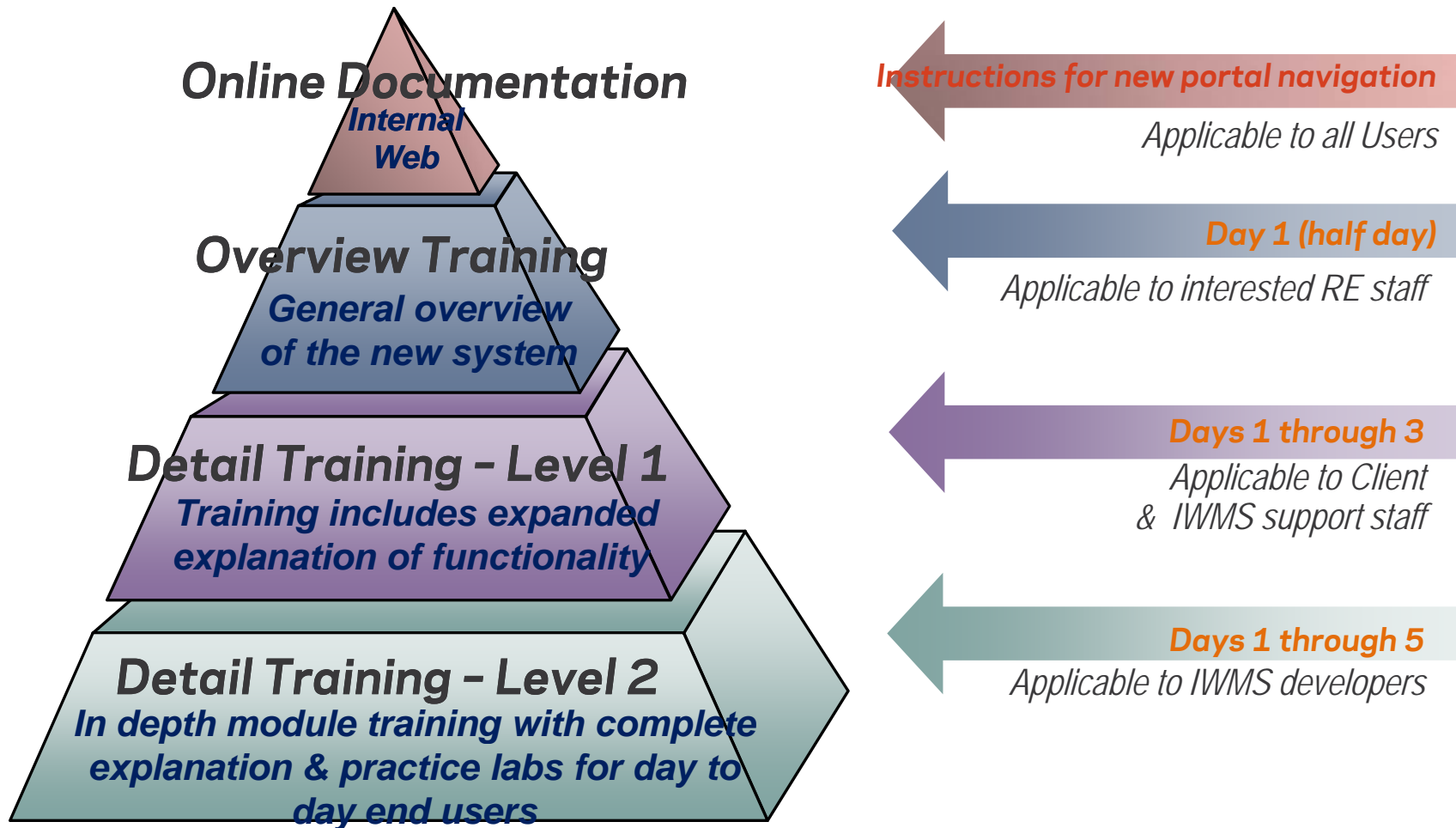
Software Functionality Evaluation Matrix		Importance Rating		Scoring Rating Code / Colors		
		O = not important		BLUE: 3 = Outstanding		
		1 = Somewhat Important		Green: 2 = Good		
		2 = Important		Yellow: 1 = Fair		
		3 = Very Important		Red: 0 = Problem		
Category	Rating					
	Vendor 1		Vendor 2		Vendor 3	
	Importance	Score	Importance	Score	Importance	Score
Vendor/Supplier Qualifications						
Organization	2	2	2	2	2	3
Customer References	1	3	1	2	1	1
Services	3	3	3	2	3	2
Billing & Pricing	3	2	3	2	3	1
Technical Requirements						
System Requirements	3		3		3	
Data Security Requirements	3		3		3	
Database Requirements	3	3	3	2	3	3
Web Interface	3	3	3	3	3	3
System Admin. & Utilities	3		3		3	
Platform supported by SMC's ISD	3		3		3	
CAD Functionality						
Product integration with CAD	0	3	0	3	0	3
CAD Functionality	2	3	2	2	2	3
Functional Requirements						
General Software Functionality	3	2	3	2	3	3
Space Inventory Mgmt.	3	3	3	3	3	3
Lease Management	3	3	3	3	3	3
MAC Management (automated)	2	3	2	1	2	3
Strategic Planning, Forecasting	1	2	1	3	1	1
Asset Management	1	3	1	3	1	3
Reports & Queries Capability	2	2	2	1	2	2
User Friendly, Graphic Interface	3	3	3	3	3	3
Ease of Custom Configuration	2	3	2	3	2	0
Integration with HR dbase	3	3	3	3	3	3
Overall look and feel of software	3	1	3	3	3	2
	<b>50</b>		<b>46</b>		<b>45</b>	

## High Level Evaluation

Software Evaluation Matrix									
Client:								Must Have Factors:	
Date:								YES 1	
Purpose: Vendor Ratings								NO 0.5	
Ref.	Category	Rating							
		Vendor 1		Vendor 2		Vendor 3		Vendor 4	
		Raw	Weighted	Raw	Weighted	Raw	Weighted	Raw	Weighted
Vendor/Supplier Qualifications									
A	Organization								
B	Customer References								
C	Financial Status								
D	Services								
E, F	Billing & Pricing								
Technical Requirements									
G (A,1)	System Requirements	0	0	0	0	0	0	0	0
G (A,2)	Data Security Requirements	0	0	0	0	0	0	0	0
G (A,3)	Database Requirements	0	0	0	0	0	0	0	0
G (A,5)	Web Interface Requirements	0	0	0	0	0	0	0	0
G (A,6)	System Admin. & Utilities	0	0	0	0	0	0	0	0
SOFTWARE LICENSING & IMPLEMENTATION COSTS									
G (A,4)	CAD Fee								
G (B,2)	CAD Fee								
SERVICE MODULES									
G (B,1)	Facilities	10 Concurrent		10 Concurrent		10 Concurrent		10 Concurrent	
G (B,3)	Facilities	10 Concurrent - OL		10 Concurrent - OL		10 Concurrent - OL		10 Concurrent - OL	
G (B,4)	Facilities	25 Concurrent - SS		25 Concurrent - SS		25 Concurrent - SS		25 Concurrent - SS	
G (B,5)	Space/Move/Planning & Forecasting	10 Concurrent		10 Concurrent		10 Concurrent		10 Concurrent	
G (B,6)	Space/Occ. Mgmt. (Strat.Plg., Forecasting)	SS - 10pk		SS - 10pk		SS - 10pk		SS - 10pk	
G (B,7)	Move Management (Asset Management)	10 Named		10 Named		10 Named		10 Named	
G (B,8)	Space/Occupancy Management	10 Concurrent + Unlim. SS		10 Concurrent + Unlim. SS		10 Concurrent + Unlim. SS		10 Concurrent + Unlim. SS	
G (C,1)	Move Management	10 Concurrent + Unlim. SS		10 Concurrent + Unlim. SS		10 Concurrent + Unlim. SS		10 Concurrent + Unlim. SS	
G (C,2)	Strategic Planning, Forecasting	10 Concurrent + Unlim. SS		10 Concurrent + Unlim. SS		10 Concurrent + Unlim. SS		10 Concurrent + Unlim. SS	
CORE MODULES (REQUIRED)									
CAD Integrator		5 Named		5 Named		5 Named		5 Named	
Bravo		10 Concurrent		10 Concurrent		10 Concurrent		10 Concurrent	
Application Builder		5 Named		5 Named		5 Named		5 Named	
Business Connect		5 Named		5 Named		5 Named		5 Named	
Platform/Core		10 concurrent		10 concurrent		10 concurrent		10 concurrent	
Enterprise Core		10 Concurrent		10 Concurrent		10 Concurrent		10 Concurrent	
Web Central Core		10 Concurrent		10 Concurrent		10 Concurrent		10 Concurrent	
Crystal Server		5 Named		5 Named		5 Named		5 Named	
ADDITIONAL SOFTWARE (REQUIRED)									
Yearly Maintenance (not required in SaaS Model)		\$30,310		\$22,600		\$12,600		\$24,600	
IMPLEMENTATION FEES									
Start-Up Fee		\$234,920		\$227,500		\$28,800		\$417,114	
Implementation		\$54,450		\$117,600		\$42,900		\$30,360	
Interfaces - Integration		\$117,600		\$42,900		\$30,360		\$21	
CAD Polylining		\$42,900		\$30,360		\$21		NA	
CAD Attachments		\$30,360		\$21		NA			
Additional Training		\$7,825		\$4,025		\$7,200			
ASP - APPLICATION SERVICE PROVIDER		60		36		24			
Software as a Service		\$7,825		\$4,025		\$7,200			
<b>TOTAL</b>		<b>\$629,480</b>		<b>\$499,114</b>		<b>\$117,800</b>		<b>\$499,114</b>	
NOTES:									
OL - Off Line									
SS - Self Serve Requestors									

## Detailed Evaluation

# TRAINING



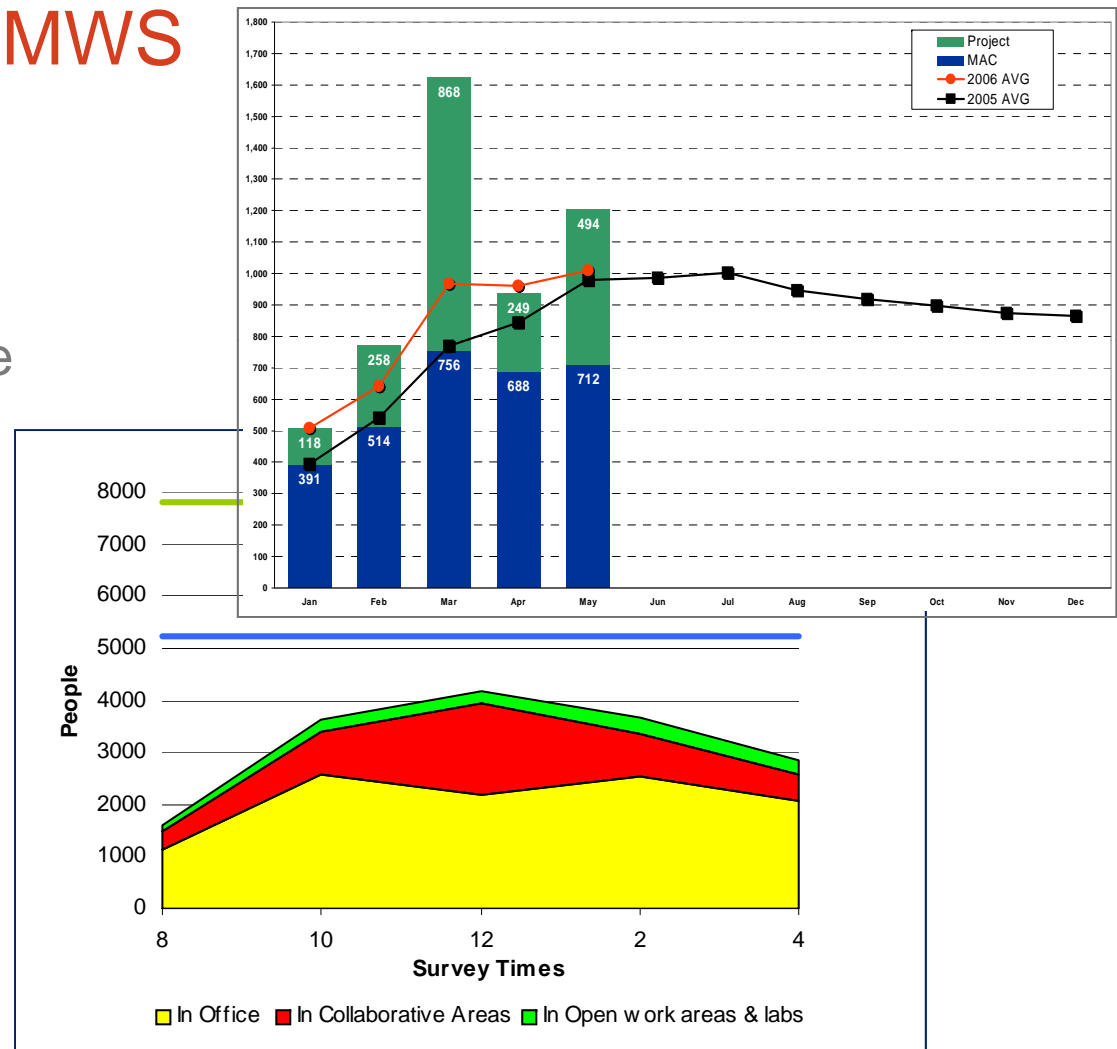


## IWMS IMPLEMENTATION ISSUES

- Current Business Processes and Policies
- Expectations & Organization's readiness for Change
- Acronyms don't match system
- Department Collaboration: IT, HR, Finance, Security
- Disconnect: Business Directives vs Users
- Scrutinize & Standardize business processes
- Organizational make-up of staff, training required
- Consultants needed for Implementation

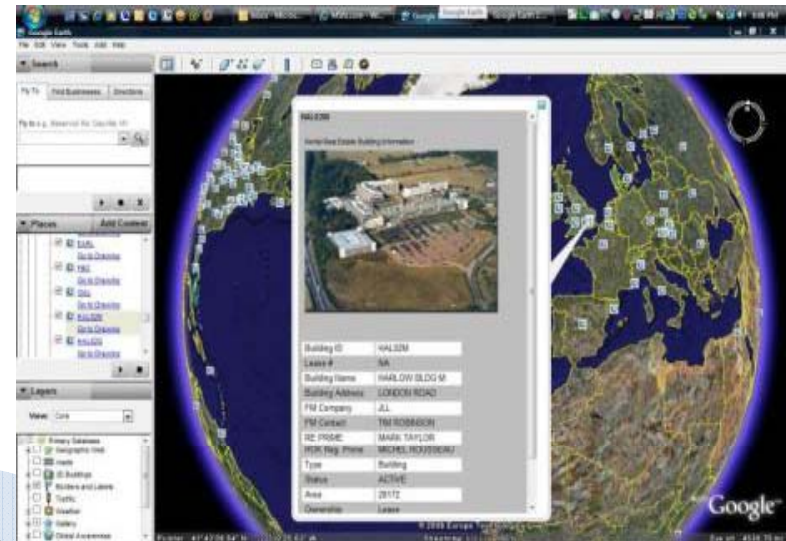
# WHY INVEST IN IMWS

- Risk Avoidance
- Partner Collaboration
- Competitive Advantage
- Opportunity to Standardization & Templates
- Measure, Measure, Measure: KPI's



## NEW IDEAS IN DEVELOPMENT

- Web based interface
- Cloud-based solutions / SaaS
- Link with BIM
- Produces KPIs and measures SLAs
- One-stop-shop
- Business Rules
- Attachment feature to Work Orders
- Strategic Planning integrates w/ Lease
- Allows Survey feedback options and monitor progress
- Customer can log own calls and check on progress
- Customer Interface is intuitive (no training)
- Global Implementation Language
- Changes to personalize system minimizes Vendor custom development





# SELLING THE NEED

## Align metrics with stakeholder expectations

### CEO

- growth & competitive advantage

### CFO

- cost & financial impacts

### COO

- operational efficiency

### Business Unit:

- service delivery & cost

### RE / FM:

- user acceptance, improved efficiency, recognized value to organization



## POTENTIAL SAVINGS

Typically organizations can extract **10% to 35%** of savings in labor expenses with controls on workplace maintenance.

One organization saved more than **\$190M** in 2 years with RE and Transaction Management.

A Fortune 500 company extended the life of its assets by **10%** through preventative and condition-based maintenance, resulting in **millions** of dollars in savings.



# THANK YOU!

- Now let's hear from our panel . . . . .



**PEGGY WITHROW, CID**

***ADVANCE Strategies***

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