Computer aided facilities management
The definitive guide
FMX in partnership with FSI

Visible gains
Benefits of a fully-fledged CAFM system

Great expectations
Selecting your CAFM provider

And...
Essential guide to choosing and running computer aided facilities management software from CAFM experts
THE FM’S GUIDE TO CAFM SOFTWARE

Facilities managers know that computer aided facilities management (CAFM) software can bring many benefits to both the FM department and the wider organisation. They’ll appreciate that CAFM software is designed to enable FMs to keep track of their organisation’s assets by linking a variety of information together electronically. However, they might be hard pressed to say just which type of tools would best serve their company’s particular requirements. For as with any type of sophisticated computer software, the vital ingredient is in knowing that you are choosing the correct software for your needs – and this means having an understanding of what exactly you should expect from the package in the first place.

This is where this special guide to CAFM software can help. It’s divided into clear, concise sections which build up a picture of the ‘must have’ attributes for the ultimate CAFM software solution.

In the introduction to CAFM software, we explore the past evolution of CAFM and explain why it is of increasingly strategic importance to a business. Next we outline the benefits a fully-fledged CAFM system can bring to an organisation when it is utilised as a core business tool. We then explain how prevailing trends are driving CAFM innovation and enabling organisations to capitalise on the information that it can gather, collate and report. Next, there is an overview of the future of CAFM, including web-enablement, new working practices and software integration. Choosing the right partner is a vital component in your CAFM system selection, and the guide concludes with advice on how to find that ideal match.

So whether you’re an experienced CAFM user, are contemplating investing in a new system, or are considering your first major investment in the software, I hope you find this guide a valuable source of inspiration.

Sara Bean, Editor
FSI Guide to Computer Aided Facilities Management (CAFM)

**Executive Summary**
How and why computer aided facilities management (CAFM), with its promise of flexible, intuitive, enabling and supporting technology, has become the facilities manager’s most important ally.

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A look at the benefits of a fully-fledged CAFM system when it is utilised as a core business tool.

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The Concept CAFM package has automated communications between the FM and onsite maintenance teams at the Birmingham Bullring shopping centre.

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The temporary loss of its CAFM software made the maintenance team for global information services, news and media company Bloomberg really appreciate its worth.
Executive summary

These are times of tremendous change and opportunity for 21st-century facilities managers as they find themselves closer to the heart of the business than ever before.

Many organisations are looking to the FM function to deliver an array of ‘soft’ services that extends far beyond its traditional remit of building and asset management. And with that evolution in attitude comes the expectation that those services will play a major role in boosting business efficiency, cost effectiveness and productivity.

At the same time, the evolution of intelligent buildings and more sophisticated working environments is pushing the technology envelope forcefully in the FM’s direction.

Computer aided facilities management (CAFM), with its promise of flexible, intuitive, enabling and supporting technology, has become the facilities manager’s most important ally in the innovation, implementation, delivery and management of a new generation of business-critical services.

Choosing the right CAFM system, working with a supplier who understands that every organisation’s needs are different, that FM has a unique role to play in today’s business infrastructure, and who can tailor the technology accordingly rather than pushing an all-purpose off-the-shelf solution, should be a vital element in any facilities manager’s strategy.

Without it, there is the very real possibility that FM professionals will be unable to contribute effectively to business development or cost savings, just at a time when they will be under greater pressure to do so.

THE PAST: OLD ATTITUDES DIE HARD

CAFM has been around for a long time, of course. Suppliers like FSI have their roots in the demand for automated mechanical and electrical service management and buildings management systems that developed at the start of the 1990s.

Even then, it was possible to spot the opportunity for closer, technology-enabled integration between the different elements of a facilities management operation as software vendors woke up to collaborative possibilities with complementary domains: airflow and temperature control systems, for example, could be used to trigger alerts and maintenance job tickets.

But at a time when using Excel spreadsheets was the extent of FM automation for many organisations, there was a prevailing perception that no IT system could possibly satisfy the unique circumstances of any individual operation – and that a ‘software supplier’ was simply that, without the necessary specialist services and skills to implement customised, truly innovative systems.

As a result, emerging CAFM vendors still tended to be categorised as hard service M&E system vendors. Faith in CAFM systems, too, was limited, especially among smaller companies who might get as far as implementation but rarely looked beyond to the wider possibilities it offered the FM function. Systems were left to collect dust, uncared for, as users failed to forge strong, proactive ties with their suppliers that might have led to more effective exploitation of the technology.

THE PRESENT AND THE FUTURE

But there has been a significant sea change during the last decade. Leading CAFM vendors have demonstrated their commitment to addressing the rapidly developing needs of a market increasingly focused on soft facilities management services.

This has partly been driven by their involvement in PFI and PPP projects, where ongoing soft service delivery is generally woven into the contract, taking equal priority with more traditional hard FM services. It has also been influenced by the convergence of estate management and CAFM systems.

These trends in turn have driven a more joined-up approach to CAFM by system vendors. Huge progress has been made in aligning software capability with the business requirement and making it proactive. Data feeds between integrated systems are commonly used to generate behaviour-promPTing reports that will have a direct impact on the efficiency of a particular building or premises, for example.

Workflow tools have added a layer of efficiency to systems integration, answering the fears of senior managers that CAFM automatically leads to the generation of yet more data silos – and demands for expensive hardware.

DIRECT OWNERSHIP

But if organisations are serious about capturing the benefits of today’s powerful, integrated CAFM systems, they need to give them priority within the business. There is still a failure at board level to understand CAFM’s strategic importance to the business.

Even if FM services are delivered by a third party who owns the actual system, it should be clear that the data itself is an immensely valuable asset to the client organisation – and that organisation needs to take responsibility for the data and explore its potential. Give it a low priority, and any subsequent failure to exploit it properly could leave the organisation in a precarious situation.

In other words, a CAFM system will deliver most effectively if it has a champion who can drive the benefits down into the heart of the operation. The champion must establish the system as a strategic business tool and not allow it to be absorbed as just another part of the administrative resource, consigning it to an invisible future.

The days are gone when it was realistic to procure and implement a CAFM system, sit back and expect it to produce an instant change and move the business forward. The only way to realise its potential is for the organisation to take full ownership and use the system positively, in anger.
Bullring is the exciting commercial face of Birmingham in the 21st century. Opened in 2003 at a cost of £500m, the 16-hectare site incorporates historical landmarks and groundbreaking modern architecture in a space that is the equivalent of 26 football pitches.

The scheme is composed on three axes, two of which form a natural extension to the city’s principal shopping streets of New Street and High Street. Between the two, St Martin’s Walk, a new pedestrian boulevard, restores historic linkages to the city’s traditional markets beyond the historic St Martin’s Church. And the nine-level centre has acknowledged its historical heritage by bringing back to life long-vanished city street names.

This includes a new pedestrian walkway next to St Martin’s Queensway called ‘Swan Passage’ after the nearby ancient route of ‘Swan Alley’, which appears on the 1731 plan of the city. Other names to reappear include Jamaica Row and Spiceal Street, which first appeared in 1795.

Bringing the site bang up to date, one of the more dramatic features of Bullring’s design is its spectacular 7,000 sq m skyplane roof. This virtually invisible expanse of glass forms a ‘floating’ covering over Bullring’s seemingly open malls, to give the impression of a natural extension of the city’s key shopping streets.

It is estimated that more than 30 million visitors flock to the centre a year, which has more than 160 shops and boutiques, not to mention its 25 restaurants (all of which have created jobs for 8,000 people), in search of retail therapy, taking advantage of Bullring’s car parking (3,100 spaces), revitalised transport facilities and state-of-the-art washrooms. For business customers, there is also a suite of full serviced conference rooms.

**SERVICE LEVELS**

Top-quality service was essential for its retailers and their customers from the outset, and automation was considered the key to the effective management of the vast complex’s diverse range of tenants – which encompass everything from small independent outlets to retail icons like Selfridges and Debenhams – spaces and assets.

Network manager Ben Darji worked with Bullring’s development team from the beginning of 2003 through to the grand opening in September 2003, and remains closely involved with the daily running of the centre. ‘It was very exciting being part of the process of bringing the centre to the state where it is today,’ he says.

‘We had one scope in mind from the start: to ensure that Bullring was viewed as the most technologically advanced centre, not just in the UK but Europe. Our initial scope was to eliminate any manual processes from the building management operation, and make it as seamless as possible.’

Darji and his team already had some knowledge of Concept, FSI’s computer aided facilities management (CAFM) software system, and it was quickly adopted as the automation platform of choice. ‘In terms of market leaders, Concept was really the only system we found which could deliver what we were looking to deliver to our users on that size and scale,’ he says. ‘It was a question of looking at the whole package, and Concept just had everything.’
In some respects, Darji and his team had the luxury of starting with a clean sheet when it came to automating Bullring’s facilities management operation. But he points out that this didn’t preclude the challenge of integrating Concept with other systems, including the building management system and the centre’s intranet.

‘You could never do a retrospective fit on that, without it entailing a complete systems overhaul,’ he comments. ‘In our case, we integrated it from the start so that it was never a standalone item. It was important that the system was part of our key operations from the word go.

‘Implementation did involve some bigger items – planned preventative maintenance, for example. That was essentially a data collation exercise and it was ongoing for some time before and after the centre opened, which we had anticipated. For the rest, most of the modules were fully operational from the time Bullring opened.’

The essential thing, adds Darji, was to automate communications between the facilities management teams, the onsite maintenance teams and the retailers occupying premises in the centre. ‘Our end users – the retailers – can log faults via their own portal on the centre’s intranet, and these go straight into Concept,’ he says. ‘The system automates billing, PPM schedules, and task and job assignments for both internal staff and maintenance workers. We’ve really used it to maximise the benefits of automation.’

**BENEFITS**

While users at Bullring’s retail outlets have access to the system via the intranet, its primary users are the onsite facilities management teams and maintenance teams who are constantly monitoring the logging, status, progress and closing of jobs.

‘You can only really appreciate the true value and worth of a system like Concept if it’s suddenly not there for any reason,’ says Darji. ‘But at Bullring, the benefits aren’t just about improved efficiency; financially, it’s equally important.

‘Concept demonstrates where, potentially, weaknesses could lie in the facilities management workforce, by providing an audit trail for a task, from logging to completion. And we use it to accentuate the positives as well. For example, it gives us the ability to schedule ahead for periods when it might be time to bring in extra staff. We can use it to give us a historic method of understanding the ratio of staff and workers to how busy the centre is, and base our calculations on reports created by the system.

Darji says the partnership between Bullring and FSI has worked well in both directions. ‘I’ve found FSI to be very adaptable and flexible with regard to our requirements,’ he continues. ‘They took the time to understand what we were trying to do as far as integrating Concept with our internal systems was concerned. A certain amount of tailoring was required and they did that in a proactive way. It was never a question of simply taking the product off the shelf and telling us, “You will do it this way,” which can be the case with some software suppliers.’

While Concept supports the day-to-day management of the Bullring complex, Darji and his team are constantly looking forward to extending its use and reaping more benefits from an automated operation. ‘One key thing we are looking at is mobility,’ he says. ‘We are trying out the use of handheld devices to assign to our engineers on site, with a view to automating task and job allocation while they are mobile. We’ll be investigating how Concept can support that initiative’

**Further information**

www.bullring.co.uk
www.fsi.co.uk
Fit for purpose

The way things were – and often still are... In this section we look at the benefits of a fully-fledged CAFM system when it is utilised as a core business tool

NON-CAFM VERSUS CAFM
Some businesses that should still don't have a CAFM system. FM departments have been asked to accept all kinds of stop-gap solutions instead – a standard IT helpdesk, an ERP module, an accountancy system module or even just a spreadsheet application – but none matches the fitness for purpose of a fully configured CAFM system, tailored if necessary to the specific needs of the business.

This has helped to create the impression that while the FM operation might need some kind of CAFM capability, it needn’t be a strategic core system. As a result, the FM department has been left hanging on to the coat tails of another business system; and by implication a poor relation of other business processes. Facilities managers must feel empowered to demand the benefits of a fully-fledged CAFM system.

CAFM VERSUS SPREADSHEETS
Even at board level, there can be a perception that the FM department can manage and report on facilities activities and service delivery using a spreadsheet or sharing a pre-existing system designed for a completely different business function. In an age when FM professionals, like everyone else, expect global access to information, this approach is simply inadequate and provides no consistency of management and reporting across a portfolio. FM departments should enlist the help of proven CAFM vendors to help make the business case for technology investment.

OLD-FASHIONED COMFORTS
Traditions die hard in FM. The comfort factor of manual systems – arrays of T-cards indicating planned works in their slots on the wall – might continue to hold sway among some, more mature FM professionals. In some cases, CAFM systems have been procured and left practically unused. In others, an ‘if it ain’t broke, why fix it?’ attitude has dominated, leading people to ask if they really needed the software. FM professionals must acknowledge and champion the business benefits of CAFM.

HARD ASSUMPTIONS
Where organisations have invested in CAFM systems in the past, they have sometimes limited their expectations of the vendor’s ability to support service delivery beyond the traditional core of hard FM functions. They are often surprised when they discover that a CAFM system like Concept actually has a sophisticated planner at the heart of its planned maintenance capability. CAFM might have originated in hard FM, but it is no longer wedded to those traditional core services and has long since mirrored FM’s expansion into soft services.

PASSIVE HELPDESKS
Perhaps because helpdesks were traditionally seen as rather passive entities – the user called, the job was logged and it was assumed something would happen as a result – organisations were slow to appreciate just how sophisticated CAFM helpdesks had become. By discounting the benefits of a CAFM helpdesk and its functionality, a major disservice to the business was taking place. Automation of processes both within the CAFM system, including integration with telephony, and other business systems enable many different things to happen as a matter of course as part of the helpdesk procedures: the identity of a caller can be established electronically; the helpdesk is populated with known data connected with the caller (telephone number, location, e-mail and so on); selection of standard fault or request criteria drives the right SLA and allows for the job to be sent – immediately – to the nearest available and suitably skilled resource; information about other recent or ongoing requests from the caller or jobs allocated against assets within the vicinity of the caller are immediately communicated and displayed to the helpdesk operator.

Experience shows that promoting the benefits of CAFM throughout an organisation reaps rewards in terms of increasing the profile of the FM function and awareness of what services the FM team provides. Company-wide web access to particular FM functions subtly raises awareness, while at the same time ensuring that the provision of that service does not become obtrusive.
INVISIBLE CAFM

Leaving the CAFM system visible only to the FM team leads to an organisation missing out on information that can drive efficiencies or help deliver a clear idea of how the business is running on a day-to-day basis.

A good CAFM system can help the FM department achieve the balance of not being intrusive while maintaining a higher profile within the business. Many FM service providers, for example, give their clients access to a web-based portal so they can monitor how effectively services are being delivered. Forward-looking FM departments give access to some elements of the CAFM system – room or car booking, for example – via the company intranet.

FM departments should aim to use their CAFM systems to extend their reach and encourage users to interact with a facility that might have been invisible before, putting themselves in the forefront of the business’s daily operations.

THE DRIVE TO CENTRALISATION

With their expertise in delivering centralised corporate CAFM systems, suppliers like FSI have revolutionised traditionally ad hoc manual methods of job allocation and communication with service engineers. Web-enabled CAFM allows end users to receive jobs and submit status and completion reports via a full range of remote devices, for example, minimising costly and time-consuming trips back to headquarters.

VENDORS DO SOFT SERVICES TOO

CAFM systems provide a natural lever for change as FM operations and providers increasingly move into integrated soft and hard services delivery, thus giving FM professionals increasingly intricate technology requirements. But vendors like FSI already have many years’ experience of developing integrated systems for the PFI/PPP market, ideal for managing high-frequency, low-duration jobs such as portering and cleaning that now come under the FM remit.

A BROADER FOCUS ON INDIVIDUAL CONTRACT WINS

FM service providers have historically approached individual contracts on a silo basis, relying on a direct onsite labour force; jobs are allocated centrally to a maintenance operative who drives to the client site with a stack of job sheets, which, when completed, are then posted back to head office where they are signed off by an administrator one by one.

However, web-enabled CAFM systems provide a model that translates very effectively into the multi-contract world of the FM service provider, and which can reduce roll-out costs on a contract-by-contract basis.

With a true web-enabled CAFM system, centralised deployment from head office or a data centre is a reality, with local access to the application being provided via the internet. Using the segregation functionality of a quality CAFM system, the client, facilities managers, supervisors and operatives are presented only with contract or site data relevant to their roles and responsibilities, and in their own language, if the contract is multinational.

PROCUREMENT

Historically, CAFM systems were bought by the facilities manager. But as FM moves to the heart of the business, so the procurement process should now involve a wider range of interests from the wider business. This inevitably makes procurement a more complex and lengthy process, but it should be seen as a positive development. For one thing, there is an increased focus on the CAFM vendor’s ability to support the system – often across different time zones – and protect the integrity of the customer’s data.

System buyers need to envisage a long-term relationship with the supplier, with both parties listening to each other rather than just
dictating terms. And they need to trust in the vendor’s ability to integrate its CAFM platform with existing business systems, as well as satisfying themselves about the real-time reporting capabilities of the system – one of the primary business drivers for investment in CAFM.

It is also vital to involve end users in the procurement process, ensuring, for example, that front-line operators understand the reasons why CAFM might change the way they communicate with head office rather than misinterpreting closer interaction as Big Brother-style monitoring.

PROFESSIONAL SERVICES
Buying a CAFM system is not just about software procurement. FM service providers and departments should look beyond the system to the range of professional services the vendor has built around its product.

It is important to scope up front the project including functionality requirements, project management, implementation and training services effort, thus giving a complete picture of what can be expected during and after implementation. There is a preconception that scoping studies are primarily a sales tool for the vendor; however, in emerging markets, such as the Middle East, scoping studies are the norm.

A scoping exercise clearly sets out the expectations of both the vendor and purchaser and helps to eliminate nasty and potentially costly surprises further down the line.

Service professionals have acquired an enviable wealth of best-practice knowledge that they will be happy to share with new and existing clients, and they can use it to help clients avoid common implementation mistakes:

- Failing to appoint a product champion within the FM organisation
- Imposing the system rather than involving end users
- Blaming the system six months in when it fails to deliver expected benefits and embarking on a needless new cycle of procurement
- A lack of professional engagement between facilities managers and the system, impairing the whole team’s performance as it tries to move forward
- Lack of a good-quality implementation plan
- Dumping the supplier once the facilities manager thinks they’ve got what they wanted without buying into the very procedures that would deliver benefits across the entire business.

ACCOUNTABILITY AND VISIBILITY
FM has often been an easy cost-cutting target, largely because it tends to be tucked away. CAFM can help put an end to that inequality within the business, acting as the vehicle for tighter integration with core processes and raising the profile of the FM operation throughout the organisation.

Effectively, CAFM enables FM professionals to make themselves visible and accountable at all times. Flags can be attached to an important client, for example, alerting the FM team to high priority calls and automatically e-mailing other individuals in the business who need to know how the call progresses.

And with the functionality of workflow technology now embedded in market-leading platforms like Concept, other parts of the business can understand CAFM’s positive contribution as they benefit from automated report delivery and the proactive pushing of key information to the departments who can use it to make an operational difference.

CHANGING DEFINITIONS
The most notable trend in FM as we approach the end of this first decade in the 21st century, is that it is becoming more and more difficult to define what FM actually is.

As it establishes ever closer ties with other core business processes, CAFM really should be seen and treated as a core business tool and the main enabler of the integration of a host of hard and soft services under the traditional FM umbrella.
According to the Home Office nearly one in five businesses suffers a major disruption every five years. Your business could be next and with no business continuity plan your chances of survival are considerably reduced.

A recent Department of Trade and Industry (now the Department for Business Enterprise and Regulatory Reform) survey suggests that seven out of 10 small businesses would go out of business within a year if they experienced a major disaster. The same survey adds that if computer systems were unavailable for 10 days or more, 50 per cent of businesses would cease trading immediately, with 93 per cent going bankrupt within one year.

The more your business relies on its IT systems, the more you need to consider how unexpected disruptions might affect your business. These disruptions could come in many forms, from fire and floods to theft or malicious attacks on your systems.

Business continuity planning improves the ability of your business to react to such disruptions. It describes how you will restart your operations in order to meet your business-critical requirements.

**WHAT IS BUSINESS CONTINUITY PLANNING?**

Business continuity planning is the process of planning for the unexpected. An effective plan will provide you with procedures to minimise the effects of unexpected disruptions. The plan should enable your business to recover quickly and efficiently, with the minimum disruption to your day-to-day activities.

Business continuity is a process developed to counteract systems failure. It is a management issue, not something that should just be considered by the IT department. Disaster recovery supports the ability of the business to recover. This includes providing facilities and services to enable the business to continue to function, and providing the critical IT applications and infrastructure necessary to support the recovery of business processes.

Developing a plan and implementing a plan are best done as a team activity. Keep numbers low; aside from FM, the people to consider include accountants, IT and other staff with specialist knowledge. Consider a deputy for each of your team members.

Remember, a business continuity plan doesn’t need to be complicated and does not need to deal with every scenario. If your plan enables you to cope with the worst case scenario, it will also help you to deal more easily with less serious incidents.

**Here are 10 absolute basics your plan should cover:**

1. Develop and practise a contingency plan that includes a succession plan for your CEO.
2. Train backup employees to perform emergency tasks. The employees you count on to lead in an emergency will not always be available.
3. Determine offsite crisis meeting places for top executives.
4. Make sure that all employees – as well as executives – are involved in the exercises so that they get practice in responding to an emergency.
5. Make exercises realistic enough to tap into employees’ emotions, so you can see how they’ll react when a situation gets stressful.
6. Practise crisis communication with employees, customers and the outside world.
7. Invest in an alternate means of communication in case the phone networks go down.
8. Form partnerships with local emergency response groups – fire brigade, police and ambulance – to establish a good working relationship. Let them become familiar with your company and site.
9. Evaluate your company’s performance during each test, and work towards constant improvement. Continuity exercises should reveal weaknesses.
10. Test your continuity plan regularly to reveal and accommodate changes. Technology, personnel and facilities are in a constant state of flux at any company.

**ANALYSE THE THREATS**

The team should begin by listing all the activities of the business and then list the likely incidents that could affect these activities. This might include storm, flood, theft, fire, machinery breakdown, power failure, computer virus, telecommunications failure, strikes and problems with suppliers. For each of the threats you have identified you should decide how likely they are to happen, cost the immediate effects of these threats on your business and consider the long-term effects.

The damage can be measured in hard terms such as financial loss and in soft terms such as commercial embarrassment or loss of credibility to your business. The most serious threat should emerge from these considerations. Remember that if you
plan for the worst-case scenario, your plan should also be effective in dealing with less serious incidents.

Once you have agreed to put in place a business continuity plan, it is the start of an ongoing commitment. Businesses constantly evolve, and recovery strategies must evolve with them. For example, as people join, transfer and leave the business, plans should be updated to reflect changes in recovery teams. When new IT systems are introduced, if they are essential to the business, you must build their recovery into your plans.

Make your plan clear and concise, to ensure that people will read it and make it available to all staff members responsible for any part of the plan. Summarise it for the rest of your staff so that they will know what to expect.

FORMULATE A PLAN

Once completed, a successful and thorough BC or disaster recovery plan will ensure that your critical business systems and processes are safeguarded against potential disaster and available when you need them to be.

An initial step towards this is to speak to your business peers. Ask the steps they take to ensure business continuity and discuss any concerns as well as recommendations they may have. Also remember to involve your staff. Many employees will be keen to become part of your business continuity and disaster recovery team and may already have experience in this area from previous roles.

At this stage, it also makes sense to speak to your IT provider. They will already have a good knowledge of how your business and its systems operate and will be well equipped to offer you impartial, expert advice on all aspects of business continuity and disaster recovery. Should they not be able to offer these services themselves then they will certainly be able to introduce you to trusted and experienced business continuity and disaster recovery specialists.

COMPONENTS OF A BUSINESS CONTINUITY PLAN

You will use information on threats to your business to start your business continuity plan. The plan should aim to reduce the risks posed by disruption to your business processes. Measures may include:

- A backup and data recovery strategy, including off-site storage.
- The development of a resilient IT infrastructure with redundancies in case of failure. For example, mirrored central server computers sited in different locations, each containing the same information, so that if one goes down, the other one is available to ensure continuity of service and alternative storage facilities.
- The elimination of single points of failure, such as a single power supply.
- The introduction of a UPS (uninterruptible power supply) for your IT systems. This is a device that allows your computer to keep running for a short time when the main power supply is lost. It uses a battery or series of batteries that takes over when power is lost and gives you time to save any data that you may be working on.
- A disaster recovery plan should specify the actions to be taken in order to recover from this event, covering:
  - People and accommodation
  - IT systems and networks
  - Services such as power and telecommunications
  - Critical business processes.
- Methods of recovery might include:
  - Carrying out activities manually until IT services are resumed
  - Staff at an affected building moving to another location
  - Agreeing with another business to use each other’s premises in the event of a disaster
  - Arranging to use IT services and accommodation provided by a specialist third-party standby site.

Make sure you keep the business continuity plan short and readable. It should not duplicate other sources of information, and any other relevant documents should be referred to. Encourage staff to review the plan before it is formally issued.

While choosing to manage your disaster recovery or business continuity plan yourself is a viable option, it is usually more cost effective to hand responsibility to an IT partner who, maximising on their economies of scale, can deliver the latest solutions at a more affordable cost than you could manage in-house. Finally, don’t forget to test your plan at least once a year to ensure that, should disaster strike, your business is truly protected.

Further information

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www.latitudeuk.com
The present
How prevailing trends are driving CAFM innovation

The days when CAFM systems simply provided an automated framework for the delivery and management of a standard set of hard FM services are long gone. CAFM software now offers a greatly extended range of opportunities for organisations to capitalise on the information that these sophisticated platforms can gather, collate and report, thanks to their tight integration with other core business systems.

Many of these capabilities have evolved as a direct result of CAFM vendors’ specialised experience in some of the most important trends to emerge in the FM market since the beginning of the 21st century: a growing awareness among FM professionals about the power of benchmarking; the impact of PFI/PPP projects on how service delivery in that rapidly developing sector is perceived and monitored; the rise of the managed helpdesk as a strategic asset in its own right; and the ongoing convergence of estates and facilities management.

THE PFI EFFECT
CAFM systems have become a lynchpin in the PFI/PPP bidding process, giving contractors access to a rich set of reporting and process management tools beyond the traditional FM remit of asset management. But service providers need to be sure that the CAFM supplier understands the unique nature of the PFI/PPP FM market, particularly when it comes to automating the payment mechanism side of the contract.

The one-size-fits-all approach simply doesn’t work in this sector and while many CAFM platforms will profess to provide a fully automated solution, few reflect the necessary understanding of just how much subtle variation there can be between individual PFI contracts. These contracts can undergo important changes as they pass down the supply chain from the end client to the PFI company and on to the FM service provider and system vendor.

Many of these modifications will apply to penalties and definitions of performance failure. The system should relate to the
resulting complexities of the eventual contract rather than any preconceived idea of a ‘standard’ working contract.

FSI, for example, has developed a specialised framework that takes account of the individual requirements of each contract, leading to the creation of a bespoke CAFM system that will deliver a customised payment mechanism solution, drawing on the combined power of the software itself and extensive experience in the field for its consultants.

The payment mechanism allows the PFI company to prove its performance and the availability of premises against service level agreements set in the contract, and enables it to set out and calculate its financial obligations smoothly and effectively.

A PFI contractor should always be looking for the benefits of working with a supplier who can demonstrate an understanding of the entire lifecycle of the contract and is committed to a methodology that follows the arc of the project from scoping the system to final delivery.

MANAGED HELPDESKS AND ESTATES MANAGEMENT

The evolution of the managed helpdesk has been another notable trend in the CAFM market, driven in part by the convergence of estates management and FM.

Providing a streamlined helpdesk service across a large property portfolio is a major challenge, particularly in cases where ad hoc growth has created a complex network of relationships between multiple maintenance contractors and service providers. A managed helpdesk can help to rationalise these complicated service delivery structures and improve efficiency across the board.

FSI has been one of the most proactive CAFM vendors in this area, forming a joint venture with The Asset Factor to create a successful managed helpdesk, Asset On Call. This proposition uses the proven helpdesk capability of Concept to optimise call logging and maintenance task allocation as a managed service for The Asset Factor’s FM arm, NB Entrust.

The managed helpdesk approach empowers the service provider to assume responsibility for performance management across the entire supply chain, taking control of every process from inception of the technology through to completion of any call. Contractor lists can be easily rationalised, delivering significant savings on the estate maintenance overheads. Tenants simply report the fault or requirement, and the helpdesk allocates the task to an approved contractor.

But perhaps the most significant advancement on the present-day CAFM landscape is the rise of the role played by professional services around the successful implementation of a market-leading platform. If they are serious about deriving the greatest possible business benefit from their investment, no CAFM customer should see services as optional add-ons to a basic software package. Ultimately, these services often hold the key to their ability to meet SLAs by accessing, interrogating and utilising operational information held in the CAFM system.

The true sign of a committed CAFM vendor is the depth and strength of the service portfolio – from project scoping and technical support to training – it has developed through its own experiences at the cutting edge of the market, and this should be an important factor in any purchasing decision.

A more proactive attitude to training by today’s CAFM customers – driven by a greater appreciation of its role in enabling staff to get the very best from the system – means that they are demanding much more from their supplier on the professional services front.

The most effective vendors have translated this demand into the development of tailored training programmes, delivered by their own specialised staff who are steeped in the business application of the software, delivered on site or at a convenient location.

Customers who want more than vanilla training should choose a supplier that can demonstrate its capability in the classroom, ensuring that classes can proceed at the right pace for the skill levels, and customising courses to suit the needs of the business.
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CAFM is evolving. Concept Evolution™ from FSI is a new web-enabled, complete CAFM solution, that will simplify your IT requirements. Evolution is easy and cost-effective to deploy and sustain, and retains the structure and familiarity of the Concept™ CAFM range.

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Lost and found

The temporary loss of its CAFM software made the maintenance team based at Bloomberg truly appreciate its worth

Bloomberg L. P. is a global information services, news and media company with clients that include central and commercial banks, investment institutions, government offices and agencies, corporations and new organisations. Probably best known for its integrated package of information, analytic and electronic trading tools (Bloomberg Terminal), it also has successful news, broadcast and publishing operations including a 24-hour television channel and a news wire service with 94 bureaus around the world.

Bloomberg’s UK headquarters are at 50 Finsbury Square in the heart of London, home to its cutting-edge television studios and SPACE, its ground-breaking art gallery which is open to the public and features a distinctive glass and steel interior designed by Norman Foster. This and two more interlinked premises – Citygate House and Lackington Street – were maintained by facilities services specialist Planned Maintenance Engineering (now rebranded as Carillion Planned Maintenance), which manages more than 20 maintenance contracts with an 11-strong team on site.

PME had been using FSI’s computer aided facilities management (CAFM) system, Concept, to manage Bloomberg’s planned preventative maintenance schedule since 2000, but in 2005 an IT glitch during an office move meant that the system had to be reinstalled and loaded from scratch.

As contracts manager Dave Pryke explains, operating without the system, even for the relatively short time it took to restore the software, was a reminder of just how crucial it had become for the day-to-day running of the maintenance service. ‘Bloomberg is a 365-day operation,’ he says. ‘Some kind of maintenance is scheduled every day, so we have quite a lot to get through each month, and we use Concept’s PPM module to look after every event.

We use Concept purely for planned maintenance tasks on a weekly basis at the moment, so it manages all Bloomberg’s plant assets in the three buildings and any scheduled servicing. We also use the Crystal Connect module of the software to generate monthly management reports.”

PME originally recommended Concept’s PPM functionality to Bloomberg and the system was installed following the client’s procurement processes at the start of the new millennium. Pryke was already familiar with Concept from his earlier experience before taking on his role at Bloomberg.

DATA RECOVERY

‘The biggest challenge for us when we temporarily lost the system in 2005 was that we had to repopulate the data from the ground up,’ he says. ‘Fortunately, we had everything entered in an Excel spreadsheet so we were able to copy the contract information across, but the loading process still took three days. Being without Concept was a heavy blow for the contracts management team because we were so used to the whole process being automated. Without it, we had to look up everything on the original spreadsheet and then manually type the events that were due for those weeks we were without the system into a PC. It just made everything a lot harder.’

A quick look at the Bloomberg plant covered by the PPM module gives a clear idea of how integral the system is to managing the contracts. ‘It’s everything you’d expect to find in a normal commercial building, with the
exception of the IT infrastructure,’ says Pryke.

Bloomberg’s rotary uninterruptible supply systems (UPSs), the electrical distribution system, the main air-handling units (AHUs) and critical power distribution units (PDUs), pumps for hot and chilled water, and the cold water tanks all come under PME’s responsibility, which, says Pryke, means ‘PPM is such a huge part of what we do here. We’re constantly looking after the chillers, the water hygiene side, the UPS and generator servicing, the heating systems. We even cover things like the escalators and glass sliding doors.

‘Bloomberg is a very client-facing company,’ he continues. ‘There’s a big wow factor as you come into 50 Finsbury Square or into the older, listed buildings. There’s a strong history of refurbishment and that means regular upgrades of entire floors and plant. There is a steady stream of newer kit. We have to be able to keep on top of the maintenance contracts to support it.’

**Benefits of CAFM**

According to Pryke, the CAFM system provides an excellent, automated framework for managing the maintenance contracts. ‘It’s a great tool, because it takes the onus off the team and allows them to focus on what they need to do to make sure the subcontractors are alerted when PPM becomes due, and that the task is completed to schedule.

‘It cuts down on the administrative time overhead and it’s extremely efficient to use. Concept is a very reliable system – once it’s set up, it really just works away on its own. Bloomberg automatically backs up the system on a remote server so we can restore it quickly if there are any problems in the future.’

Pryke recommends FSI’s training course for the new Concept user. ‘If you’ve done that, you’ll find the system very easy to navigate,’ he says. ‘It’s Windows-based and easy to use.’

From the client’s perspective, the report tool is a vital means of measuring the percentage of tasks being completed on time, and the performance of the PPM function in relation to service level agreements (SLAs).

‘The client [Bloomberg] can see where we are with every aspect of PPM servicing, how long tasks are taking and where there are significant delays,’ explains Dave. ‘And that means we can keep on top of the schedule and minimise the risk of penalties with regard to any planned maintenance task.’

Although the system will continue to be used for PPM only in the near future, Bloomberg and PME are looking at the possibilities of using it for risk management tasks in the future, predicting the impact and costs of plant going wrong. ‘That would be a good way forward for both the maintenance service and the client,’ says Pryke. ‘Basically, Concept is a very helpful tool and I don’t think it would be possible to manage maintenance contracts as efficiently without it.’

Further information

www.bloomberg.com
www.carillionpm.com
www.fsi.co.uk
The future of CAFM
Web-enablement, new working practices and integration

As end users become more closely involved in the CAFM system procurement process, their expectations will have a greater influence on system developments. Business drivers such as lower cost of ownership and ease of deployment and access will put vendors under increasing pressure to provide web-enabled systems and to make them more accessible and deliverable across the full spectrum of communications technologies.

To date, some vendors have only web-enabled key parts of their systems, but end users should now consider buying from a supplier that has, as part of its offering, a completely web-enabled solution, built with the needs of non-specialist users in mind. While it is readily accepted that it can never offer the same level of rich user experience as a good-quality win product, a true web-enabled CAFM system allows centralised deployment and control, thus providing cost benefits in terms of infrastructure and IT maintenance, while allowing users the flexibility of access from any web-enabled computer.

FLEXIBLE SOLUTIONS
As working practices evolve an increasingly influential element of the FM sector is staffed by remote and mobile workers, who depend on flexible and instant access to information held on the CAFM system, wherever they are – including at home. They will expect to be able to find it from their portable devices and mobile handsets via a web browser as a matter of course.

The CAFM system will have a cultural impact on the FM operation, removing the need for constant referral – and even physical visits – to head office and, thanks to automated helpdesks, liberating support staff to focus on more productive activities while addressing the increasing importance of a good work-life balance.

STRATEGIC ADVANTAGES
CAFM will also enable facilities managers to continue their journey from relative invisibility within the organisation to active participation in strategic management, often
at the highest level. Web-enablement will also be an important factor in the tighter integration of the CAFM system with other key business systems such as buildings maintenance and estates management platforms.

The benefits of system integration are already well understood, with close ties between HR and accountancy packages now commonplace – and we can expect to see CAFM integration rise swiftly up the agenda as businesses look for more ways to capture and use information that now has a strategic imperative.

Today, FM professionals have a far greater appreciation of the value of CAFM integration at a deeper level, and vendors like FSI have moved quickly to address this with workflow modules designed to enable systems to co-exist and share information productively.

This will also help FMs to address cost-of-ownership issues, which have historically been a topic for debate at board level. If the CAFM system becomes a central repository for information gathered from a wide range of business systems, and this information is used on the business frontline to assess risk, manage cost and efficiency, and improve productivity, the potential return on investment will become extremely attractive.

To a great extent the need for interoperability and integration with energy, lighting, security, logistics, telephony, ERP and IT systems will drive the evolution of CAFM technology. As previously standalone systems emerge from their silos, CAFM systems that are driven by a new focus on the working environment will come to the fore.

Many of these systems will have been purchased from an independent software supplier. But software protocols are increasingly standardised and FM professionals are becoming more comfortable with the concept of centrally managing a mixed brace of systems. There is no reason why, with the sophisticated workflow capability of today’s leading platforms, CAFM should not become the glue that brings them all together.

At the same time, as more attention is paid to the effect of the working environment on staff productivity and efficiency, information is required about the way assets and equipment – rooms and lighting systems, and ‘hot’ desks, for example – are used.

This information about usage patterns is becoming more important in the determination of internal business strategies, and again, if CAFM is seen as the primary gatherer and deliverer of the information, it becomes a major agent for realising change and new objectives throughout the organisation.

GLOBAL CAFM

As far as the bigger picture is concerned, the future of CAFM is increasingly driven by a more globalised view of the facilities management function and the services it provides. Innovative attitudes and expectations in international markets will be a positive influence on UK CAFM strategies.

Global organisations now expect to be able to deploy CAFM systems throughout their infrastructure, regardless of international borders, rather than focusing on individual buildings or premises at a local level – and without any impact on the functionality of the system.

Emerging markets in the world’s construction hotspots – particularly Africa, China and the Middle East – are driving a new understanding of the importance of establishing the role of asset management at the earliest possible stage in a development. It is now becoming an integrated part of the planning process for the way buildings will be used by their occupants and managed by the CAFM system.

These delivery markets are vital to FM service providers in particular as they seek to prove themselves to an increasingly exacting and forthright client base, and develop their reputations on the global stage. They can only successfully exploit them if they can demonstrate an understanding of the unique requirements of each market, and they should be looking to the sophistication and flexibility of proven, leading-edge CAFM tools to help create and deliver an appropriately innovative range of services.

The rate of market development in some places is breathtaking. Since FSI opened its Dubai office in 2002, for example, starting with just a handful of clients, it has acquired a customer base that is almost 40-strong. But this is just the start.

SERVICE DELIVERY

CAFM is emerging as a crucial enabler of, and mechanism for, FM service delivery and excellence, and that means service providers must take full advantage of the knowledge and expertise of system vendors who have spent time and resources acquiring an intimate local understanding of market drivers and conditions.

High-quality customer-facing services, in particular, will be increasingly important influences on CAFM system development, as it becomes the machine of choice for justifying service excellence through factors like key performance indicators.

This trend is a neat parallel with the blurring of distinctions between hard and soft services in the UK. The best system vendors will be proactive in their response to the growing sophistication of the market’s requirements, ultimately bringing CAFM to the fore as the FM service delivery tool of choice around the world.
Choosing the best CAFM system is not just a matter of assessing the software platform. Leading vendors say that an increasing proportion of their business comes from their service portfolio and the added value, which they claim to deliver around the core system. In other words, the credentials of the vendor should also come under close scrutiny before any final purchasing decision is made.

One of the main defining factors is the standard of the vendor’s existing customer base, best demonstrated by references and case studies. Some vendors struggle to provide an extensive range of high-quality customers that can demonstrate the strength of their technology and commitment to supporting service delivery across a variety of sectors.

Any prospective CAFM system purchaser should expect to see independent, first-hand evidence of a thriving customer base that is happy to discuss the business benefits it derives from its investment in the platform.

**SHARING INFORMATION**
Prospective clients should find out if the vendor actively promotes a climate of CAFM best practice knowledge sharing through a healthy programme of customer networking events that attract existing and potential customers.

FSI, for example, has established Tune in to FM, a regular series of well-attended seminars where senior facilities management professionals often give presentations about their CAFM experiences, and a user community has evolved with a genuine sense of system ownership and a vested interest in influencing the ongoing development of their chosen software.

**SUPPLIER RELATIONSHIPS**
At a time when system usability and integration capability are high on the CAFM customer’s shopping list, buyers should also examine the vendor’s relationship with other important software suppliers. Clients should look beyond the Windows front end of a CAFM package at the vendor’s professional commitment to developing and exploiting key relationships.

Surprisingly, for example, only a handful of CAFM suppliers in the UK are Microsoft Gold certified partners. But an accredited vendor has clearly demonstrated its commitment to staff and product development in line with a software platform that sets the pace of user expectations around the world.

Microsoft Gold partners go through a rigorous assessment process, and can only retain the standard through regular reassessment. But CAFM vendors who have achieved this level can prove their commitment to continuously ensuring that they have a superior number of highly qualified individuals on their software development and delivery teams – and that they are bringing technology to market that is constantly taking CAFM systems to new levels of innovation and business efficiency.

CAFM customers with a particular interest in specific technologies such as mobile communications, or particular elements of automation under the increasingly diverse umbrella of FM services, should look at the quality of partners that vendors are working with beyond their core system development.

So a CAFM software purchase is as much about the people behind the product as it is about the system itself. Vendors should be able – and prepared – to prove that they have full ownership of their product and can control the development of the software they are proposing. Buyers should look for evidence of a substantial, well-qualified development team. And they should expect to see all aspects of the system and services represented at the presentation stage of procurement, including training and support, rather than an over-reliance on slick sales professionals.

Further information
For more information on FSI and the Concept range of computer aided facilities management (CAFM) software, visit www.fsi.co.uk
Centre of excellence in South Kensington to a provincial hospital he recognised that the day-to-day issues faced by the clinical staff were the same.

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