Wellcome Trust

Background

Wellcome Trust is a charitable foundation dedicated to fostering and supporting biomedical research in the UK and overseas. Founded in 1936, the Trust today gives more than £600 million in its quest to achieve extraordinary improvements in human and animal health.

Its headquarters - the high-tech Gibbs building - is one of the landmarks on London's Euston Road, while Wellcome Collection next door is a state of the art exhibition and conference centre, which also houses a café and library. These, together with three other buildings (including a storage site in Harlesden), form Wellcome Trust's multi-faceted property portfolio.

In 2009 the Trust, which was already a seasoned CAFM user, embarked on a major upgrade project with the intention of streamlining service delivery and exploiting the benefits of an integrated, modern CAFM system.

"I had a vision for where we should take our CAFM strategy for the future," says Head of Building Services Alan Aldridge. "We drew up a specification and then we went to the market and looked at the big players before instigating a tender exercise."

Following a thorough assessment, FSI's Concept Evolution™ was chosen as the new platform for Wellcome Trust's help desk, PPM and purchase ordering strategy. Its modular, web-based structure was a good fit with the Trust's strategy.

So was its potential to integrate with the organisation's existing smart screens and Agresso ERP software.

Alan already had some experience of working with the software, as well as considerable experience of previous CAFM implementations - so he knew the challenges ahead and the importance of two vital elements: extensive preparation and top-quality, accurate information on which to set the system's parameters.

"A CAFM system can be all things to all men, so it's important to get the core information set up properly," says Alan. "That's something newcomers to CAFM don't always get. You need to maintain a focus on your end output - which should be a good system that fits your business. What can it do? How will you do it within your set-up and processes?

"You need a lot of operational analysis before you decide how to structure your helpdesk, PPMs, SLAs and schemes of delegation within the system. Also asset verification, hierarchies and workflows must all be identified. You need to understand your business processes and your customers.

"We also did a lot of work-shopping to discover the different requirements of our users and customers in terms of KPIs and turnaround times, so we could understand what they wanted to get out of it. I'm using CAFM from a professional management perspective, with control and measurement strongly in mind. But because it sits on our IT systems, we needed an IT project manager to steer the implementation."

The Challenge

The project was initially split into two phases, which would run in consecutive financial years. Thanks to detailed advance planning and preparation, Alan says implementation was "quite straightforward". The first phase, which began in February 2010 - implementation took four weeks - focused on migrating the information to Concept™, getting the Help Desk up and running, KPIs agreed and PPMs working well. The system then had six months to settle down while retraining and refresher opportunities were identified to ensure that users would get the most out of it and there would be organisation-wide buy-in.

The second phase, which was rolled out during 2011, focused on the dash-boarding aspects of CAFM as a service delivery tool, raising its visibility across the organisation as a management tool and a mechanism for service delivery partners to manage their resources more effectively. This was also an important stage in the move from paper-based job trails to PDAs for engineers and service delivery staff that allow them to interact with the Help Desk in real time.

"Visibility is vital," says Alan. "Dash boarding opens the door to Concept™, otherwise CAFM is isolated on someone's PC or the Help Desk screen. We had to make it available to public view. Concept™, like any good CAFM system, isn't just about flashing red lights. If you're clever with it, you can get some healthy competition going between your service delivery engineers! But you also get another level of ownership if you assign PDAs to an engineer. Jobs that come through are 'your' responsibility - they aren't lost on a piece of paper somewhere."

Alan acknowledges that this aspect of the project was one of the biggest challenges. Initially, the PDAs met with a negative response because some users saw them as tools for 'keeping an eye' on their activities. But when they were also given mobile internet and email access, the benefits became clear. Alan says this has been a win/win success and has had a significant impact on the service delivery culture with real-time reporting reducing job times and speeding up responses.

"A lot of our KPIs encourage positive behaviours such as self-reporting," says Alan. "That can then lead to service partners looking at how they can use Concept Reach™ to report something in real time. For example, security patrols in the evening can use it to report jobs as they discover them - and that increases my eye on the ground.

"Facilities management is still a relatively new industry, and we're trying to raise its profile so that it becomes part of the corporate jigsaw rather than a back office operation that isn't contributing to the bottom line. But if you can show more efficient service delivery methods and PPMs as a result of investing in CAFM, people can see that it really does add to the bottom line."

The Benefits

Alan says that Concept™ has already delivered a number of important business benefits - greater efficiency, faster job completion, closer engagement with service delivery partners, more productive engineers and higher levels of customer satisfaction.

"The workflow module lets us raise a job, change its status and send automatic emails to key stakeholders so that there is a complete, live reporting trail," he says. "We've also been able to use it from a customer feedback perspective: for every tenth job, the system automatically sends out a link to Survey Monkey, and we're getting a 20 per cent response to those from our customers - which is a significant step forward in terms of visibility for our services.

"We've also managed to reduce our Help Desk staffing level from two to one, thanks to self-reporting and PDA access to the system. They are still handling around 800 jobs per month but the system is now so streamlined that one person can fulfil the Help Desk function."

Wellcome Trust has a good working relationship with FSI. A dedicated account manager works with the organisation on the system's natural, organic development, and makes sure Alan is kept informed about new modules in the pipeline.

"That helps me to build my strategic plan and adjust it, as well as getting buy-in from the financial team at an earlier stage," he says. "I've had a long relationship with FSI and I like to think that as a customer I can help to make things happen that will benefit the development of Concept™ and achieve mutual benefit for both supplier and client.

"The next phase of our CAFM project will probably see us move to bar-coding for plant and equipment, which will encourage an even deeper level of self-reporting on basic issues across the Intranet - helping us to manage temperature control, lighting and so on more efficiently and responsively."