Welcome!

A Global Workplace Community within CREC and CFC focused on increasing Workplace Innovation and Consciousness

International Facility Management Association
Introductions

Presenter:

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Host:

Chris Hood
Global Corporate Services, Workplace Strategy and Occupancy Management, Platform Lead, CBRE; Sr. WE Advisor
October!  ------ Rex Miller will be talking about his new book

In a recent IBM survey, over 1600 CEOs were asked, “What keeps you up at night?” Overwhelmingly, the answer centered around one topic.

**HOW DO WE KEEP RECREATING THE SAME MIRACLE WE PULLED OFF LAST YEAR?**

This is a question of **INNOVATION**, the continual improvement of who you are.
WHAT DOES EXCELLENCE LOOK LIKE IN THE MANAGEMENT OF THE WORKPLACE?
Andrew is AWA’s Managing Director. He is regarded as a leading specialist on Workplace Strategy and Management and has led many major Change Programmes for organisations implementing new ways of working and improving the strategic performance of the workplace.

As well as his consultancy work, he led AWA’s The Kinetic Organisation Research Programme in 2011 and is involved with AWA’s Workplace Performance Innovation Network (PIN) which supports leaders through workplace change and undertakes research into unanswered questions about work, workplace, technology, people and organisations.
DR GRAHAM JERVIS
DIRECTOR AWA

Graham is an IT professional by origin and a founding member of AWA. He transitioned across to Facilities Management where he used many IT Management concepts in his work with clients. He is the architect of the Excellence Model for the management of the workplace. Before joining AWA 20 year ago, Graham held senior operational and strategic management positions within large UK corporates.

He is a strong advocate of developing clear links between business goals and workplace strategy and performance and has led several projects which have involved audits of client’s FM organisations and suppliers as a baseline for strategic improvement. He has worked with organisations including Lloyds of London, Standard Life, Scottish Power, Prudential and Infineum.
40 MINS OF CONVERSATION FOLLOWED BY 20 MINS OF Q&A
WHAT DO WE MEAN BY EXCELLENCE?
1

WORK IS CHANGING

- Meetings
- Privately
- Together
- Quietly
- On the move
- Touchdown
- Another country
- Securely
- Outside
- Cafe
- At home
THE WORKPLACE IS EVERYWHERE and should be designed to

- Allow people to do their best work every day
- Re-enforces brand and culture
- Aligns with the BUSINESS strategy
- Aligns with all the SERVICE PROVIDERS
- Whilst delivering that experience in an economic fashion
WE ARE COST DRIVEN

YEAR 1 | YEAR 2 | YEAR 3 | YEAR 4 | YEAR 5

100 90 80 70
WE NEED TO THINK ABOUT THE TOTAL WORKPLACE EXPERIENCE

SENSORY STIMULI

TIME

HOME
TRAVEL
ARRIVAL HANDLING
‘WE’ TIME
FORMAL MEETINGS
INFORMAL VISITOR MEETING
ON THE MOVE

WE NEED TO THINK ABOUT THE TOTAL WORKPLACE EXPERIENCE
WE MAINTAIN OUR SILOES AND HAVE NO UNIFIED VISION
STRATEGY

FULL SPECTRUM OF DISCIPLINES

JOINED UP EXPERIENCES

aligns with the BUSINESS strategy

BEST WORK EVERYDAY

CONSISTENT SET OF TERMS

BUSINESS RELATED LANGUAGE
THE IDEA
http://store.blurb.co.uk/ebooks/372696-moving-on-fm-to-workplace-management
Since December 2013 we have had a working party working (people from all sides of the industry in the UK) challenging/shaping and helping us get a tight document that makes sense and that can be picked up and used
5

THE MODEL
FRAMEWORK INCLUSIVE OF ALL WORKPLACE TYPES
1. **Defines** the required management disciplines

2. **Maximises** the strategic and economic benefit of the workplace

3. **Enables** the development of best practice, organisational and people capabilities

4. **Communicates** the management requirements needed to deliver the effective workplace

5. **Measures** the effectiveness of the organisation (internal and service partners)
5

How will the framework be used in practice?
We envisage the standard as sitting within a charitable foundation and accessible by all...supported by tools with translations in a variety of languages.
We think it can be used as a means to...

**IMPROVE PROFESSIONALISM**

**BENCHMARK ORGANISATIONS**

**SET OUT AN EXCELLENCE AIMING POINT**

**USED TO SUPPORT PROVIDER PROCUREMENT**

**ENCOURAGE INNOVATION**

**USED IN WHOLE OR PART**

**USED TO UNIFY DISCIPLINES**

**USED AS A TRAINING FRAMEWORK**
STRATEGIC MANAGEMENT

What LONG term STRATEGIC GOALS of the business do CRE/FM critically support?

STRATEGIC 1 -5 YEAR demands for CRE/ FM services

Strategic 1- 5 year services supply plan

CURRENT CONSUMPTION OF SERVICES/ RESOURCES

Annual services supply plan & resources for short term needs

TACTICAL 0 -1 YEAR demands for CRE/ FM services

CURRENT CAPACITY & CONSTRAINTS OF SERVICES/ RESOURCES

Performance Management

SOME DETAIL
PERFORMANCE MANAGEMENT

DEFINITION
Performance Management enables the measurement of the effectiveness of operational delivery and the implementation of quality improvement plans.

SUMMARY
The most important part of performance management is in the use of the results data to enable the engagement of all parties to achieve the desired outcomes and to drive improvement.

However, performance management is often misinterpreted and the wrong things are measured against poorly defined objectives and outcomes leading to wasted time and effort.

BEST PRACTICE
1. Clear Service Level Agreement (SLA) against which KPI’s are set
2. SLA’s and KPI’s are aligned as closely as possible to the businesses strategic goals
3. KPI’s chosen on basis of measuring desired outcome as opposed to ease of accessing data
4. A focus to balance performance with other measurable targets, financial, quality, H&S etc.
5. Use of Quality Improvement Plans to address failures and/or focus on specific service areas
6. The ability to analyse performance data and interpret trend data
7. Benchmarking specific data which assists in informing strategy i.e. focuses on the important issues for you
8. Customer Satisfaction and Customer Needs analysis used to drive performance improvement

OUTPUTS

STRATEGIC
1. Overarching Service Level Agreement linked to business objectives, vision and values
2. Process to adjust the balance of ‘importance’ for elements of the performance management system to focus on certain areas
3. Each measurement has an owner
4. Outcome based SLAs
5. Benchmarking
6. Trend Analysis
7. Customer Satisfaction and Customer Needs Analysis

DELIVERY
1. Suite of KPIs which are measurable and meaningful with clear targets/thresholds
2. Clear Reporting which is easily interrogated and Dashboard alert systems
3. Quality Improvement Process
4. Use of simple statistics to identify changes from random variations
5. Engage suppliers and clients in performance reviews
6. Everyone values measures as useful feedback to help them do their jobs better

SOURCES
PuMP Performance Management
Show Me the Numbers
Information Dashboard Design
KPI Register for The workplace Management BIFM & ARK Balanced Scorecard: The Facilities Management Professional Standards Framework
BS EN 15221-7 Guidelines for Performance Benchmarking in The workplace Management
AN EXAMPLE OF HOW IT MIGHT BE USED
1 WORKSHOP  Explain WM concepts with leaders of CRE/FM

1a WEIGHTING

2 COLLECT EVIDENCE  Monitoring oversight

3 SHARE CURRENT STATE

4 IMPROVEMENT WORKSHOP

5 EXCELLENCE PROGRAMME
PROCUREMENT

Define requirements in the procurement contract

SUPPLIER DEVELOPMENT

Suppliers may wish to demonstrate compliant processes

GENERAL

Shift of focus from cost to value and management competence

POTENTIAL APPLICATIONS
WHAT NEXT?
Read it.... See if it makes sense...it’s a live document so we’d be delighted to receive feedback
Q&A
WE Launch!

- **NEW Website** – http://we.ifma.org

- **WE @ World Workplace**
  New Orleans Sept. 16-19th
  - Tuesday, **WE Master Class** /1:00 – 5:00
  - Wednesday, **WE Connect** / 7:30-10:00
  - Thursday & Friday, **Workplace Track**, **WE Room** & **WE EAT**

Kate North
Chair, Global Workplace Evolutionary
VP, Global Development e-Work.com
**STRATEGIC MANAGEMENT**

**DEFINITION**

Strategic Management is concerned with the innovative alignment of workplace assets and services with the core purpose of the organisation and the creation of the mechanisms by which the workplace and services are effectively and economically designed and delivered on a day to day basis.

**SUMMARY**

The main goal of the strategic management of workplace assets and services is to align these strategies with those of the main business. Its principle challenge requires it to put in place formal and informal processes to engage with the senior business executive to solicit their support and to ensure that the benefits of workplace innovations are exploited throughout the business.

It is further responsible for growing the professionalism of those internally responsible for interpreting business requirements into service needs and ensuring those needs are met.

**SOURCES**

The Future of Work
Raising the Bar: Enhancing the Strategic Role of Facilities Management
Strategic Facilities Management Professional Guidance Edition 1
DNA of a Successful Facilities Manager
The Facilities Management Professional Standards Framework

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**BEST PRACTICE**

1. A documented and published Workplace Mission or Vision Statement that has been agreed by the Executive and made public to the organisation as a whole.
2. A Workplace strategy developed covering present and future needs and expectations from all stakeholders including suppliers and internal customers.
3. The Workplace Strategy is based upon headcount demand projections, knowledge of supply, business outlook and future trends in working is produced and presented to Executive Management at regular intervals.
4. The workplace strategy is reviewed with other Infrastructure Support Functions such as IT and HR on at least an annual basis for implications to new ways of working and developing desktop and telecoms technologies.
5. Have active continuous professional development programmes in place to ensure that staff understand how the world of the workplace is changing and to develop their knowledge base and experience across the broad dimensions of CRE/FM.
6. Service performance measurement to encapsulate users’ total experience of their working surroundings.

**OUTPUTS**

**STRATEGIC**

1. Well publicised Workplace/CRM/FM vision statement.
2. Workplace Strategy endorsed by senior business executives
3. A quality improvement process in place
4. Processes are in place that improve overall professionalism and encourage innovation.

**DELIVERY**

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CLIENT RELATIONSHIP

DEFINITION
Develops and maintains effective relationships with internal clients and consumers to gain an intimate knowledge of future plans, demand for the workplace assets and services.
Provides a proactive advice for the evolution of the workplace experience to deliver greater value at an economic cost.

SUMMARY
The main objective of Client Relationship Management is to act as a communication bridge between internal businesses/consumer groups and the suppliers of the workplace assets and services. The role requires excellent communication skills and processes as well as wide experience of the technicalities of the services provided. The focus is shorter term than Strategic Management, more concerned with meeting existing requirements and supporting changes within the 0-1 year period. However, it should include a degree of change management consultancy supporting newer ways of working where appropriate.

SOURCES
The Facilities Management Professional Standards Framework

BEST PRACTICE
1. Regular formal reviews with client user department management are used as input to strategic plans, to modify existing plans and identify new projects and requirements
2. Service Level Agreements for individual user departments take into account differing requirements wherever possible.
3. Regular surveys carried out on all services used by occupants to the workplaces in order to gauge perceptions and satisfaction.
4. A communication plan for promulgating plans, successes and initiatives to the wider company/organisation’s workforce.
5. Performance of services and quality Improvement plans are reviewed regularly with client groups.
6. Post occupancy review are held at the end of major move or change projects.

OUTPUTS

STRATEGIC
1. A regularly updated forecast of business units’ or consumer groups’ likely demand for workplace assets and services in the immediate or short term.
2. A knowledge base for each consumer group to enable proactive proposals for changes in workplace options and arrangements to be made.
3. Detailed knowledge of the requirements of consuming groups are taken into account in drawing up overall strategic plans.
4. Services provided conform to the FM strategies and policies.

DELIVERY
5. Performance of all workplace services used by each business unit or consumer group.
6. SLAs reflect accurately the requirements of the consumers of services and the strategic requirements of the organisation.
7. Quality improvement plans deal with the issues raised by the consumers of the services.
8. Projects and changes involving consumers are dealt with efficiently and effectively and with the collaboration of other infrastructure suppliers such as IT.
PROJECT MANAGEMENT

DEFINITION
This competency is an essential process for CRE/FM functions and requires skills in planning, organising, motivating, controlling resources, procedures, and protocols to achieve specific project deliverables on time and on budget.

SUMMARY
Workplace projects range from small moves and changes involving little risk to the business to large relocations, new builds across multiple geographic domains. In these latter cases a high degree of individual project management skill and experience is needed as well as organisational capability to support and provide governance across the many stakeholders involved. For large organisations the role of the project management may involve a high degree of programme management and being able to cope with cultural differences as well as the political sensitivities.

BEST PRACTICE
1. Project Management is treated as a distinct skillset and discipline where Project managers are trained and developed specifically to manage complex projects.
2. Documented procedures are used throughout the project lifecycle.
3. Projects are planned and managed using software and systems designed for that purpose.
4. Risk Assessments are routinely done on all major projects and programmes.
5. An effective Change Control set of procedures is actively used.
6. A project/programme governance structure as an authority to agree to changes during the project.
7. Clients and suppliers are actively involved throughout the project life cycle.
8. A communications plan is used to ensure that all interests are properly informed throughout the project.
9. A reporting structure is in place for all projects.
10. Post Implementation reviews are held and used as a learning opportunity to improve and innovate.

OUTPUTS

STRATEGIC
1. All FM projects are reviewed in terms of their fit to the strategic plans.
2. Risks are actively managed.
3. The project/programme governance authorises all significant changes.
4. Project/programme management skills are developed.

DELIVERY
1. Multiple Projects involving the interests of multiple stakeholders are successfully managed.
2. The benefits of the project are realised.
3. Projects are delivered to time, scope and cost.
4. Reports are delivered as planned.
5. Post implementation reviews (PIR) are done.
6. Learnings from PIRs are progressed.

SOURCES
The Facilities Management Professional Standards Framework
ISO 21500 Guidance on Project Management 2012
PRINCE2
PMBOK® Guide
SUPPLY CHAIN MANAGEMENT

DEFINITION
The supply of services and provision of workplace assets are governed by a strategic process that ensures that they are provided in a manner that supports the strategic needs of the business.

SUMMARY
Supply Chain management covers the entire supply chain life cycle from strategic policies and plans, selection of suppliers of all the workplace assets and services, the negotiation of contracts, the mobilisation of supply, monitoring of performance and where appropriate the termination of contract.

BEST PRACTICE
1. There is a supply chain strategy that covers all the workplace services and assets.
2. The strategies and policies are agreed between CRE, FM and Procurement.
3. The selection process of suppliers involves all stakeholders.
4. A partnership style of client and supplier relationship is reinforced through a management governance structure.
5. The governance seeks to build a commercial basis of mutuality that provides long term benefits.
6. Innovation and flexibility to business change as well as cost are seen as key requirements.
7. Review of contracts performance and benchmarking are carried out by independent audits.

OUTPUTS

STRATEGIC
1. Supply chain Strategy
2. Procurement standards and policies
3. Contracts that have exit plans
4. Sharing of knowledge and business information across the supply chain
5. Relationships across the supply chain are overseen by a Governing management group
6. Contracts reviewed annually with respect to their continued alignment with business needs.
7. The benefits from Innovation are shared.

DELIVERY
1. Open book accounting for costs of services
2. Balanced Card performance reviews carried out monthly
3. Trends in performance are reviewed and Quality Improvement Plans jointly owned.
4. Communication across the supply chain is actively encouraged and supported by appropriate activities that support social cohesion.

SOURCES
The Facilities Management Professional Standards Framework
ISO 11000 Collaboration Standard 2010
BS EN 15221-2 Guidance on how to prepare facility management agreements
CAPACITY MANAGEMENT

DEFINITION
The provision of appropriate levels of physical assets, services and technology needed to achieve the organisation’s strategic purpose in the most economical way.

SUMMARY
Requires understanding of the capacity of the workplace, services and technologies and the constraints and limitations these may have. It also requires knowledge of the actual consumption of these.

SOURCES
BS EN 15221-6 Area and Space Measurement in The workplace Management
The Facilities Management Professional Standards Framework

BEST PRACTICE
1. Creation and maintenance of databases of capacity data of all physical assets.
2. Maintain Records of all constraints of physical assets e.g. floor loadings, maximum power supply, HVAC, Health & Safety, etc
3. Use of computer models that estimate the changes in demand for services and assets resulting from changes in the business.
4. Create strategies for acquisition and disposal of physical assets and for the management of redundant assets or vacant space.
5. Systems exist that integrate the data of CAFM with data from BIM.

OUTPUTS

STRATEGIC
1. Accommodation Plans that support the businesses strategic plans
2. Space standards
3. Space charging
4. Policies for management of vacant space
5. Policies for acquisition and disposal of the workplace assets
6. Models that illustrate the effect of flexible ways of working on use of assets

DELIVERY
1. Maintenance of records of capacity and constraints to capacity for all buildings.
2. In conjunction with Resource Management meet the changing requirements of the organisation.
3. Identifies potential shortfalls in capacity
4. Identifies areas of over-supply.
RESOURCE MANAGEMENT

DEFINITION
The day to day management of resources needed to deliver effective workplaces and services. It covers both physical assets, human resources and utilities.

SUMMARY
Resource Management covers the management of all resources used to provide workplaces and services. In conjunction with the management of Capacity it addresses the need to balance the demand for workplaces and services with their supply.

BEST PRACTICE
1. Monitoring the occupancy of floors to ensure they are not under or over used.
2. Regular audits of storage.
3. Processes to ensure CAFM data is up to date and take account of day to day moves and installs.
4. Use of systems that measure the actual use of assets and services e.g. utilisation of various work spaces, workstations and meeting rooms.
5. Ensuring space standards are enforced.
6. Management systems that highlight excessive use of energy.
7. Professional Services of a Certified Energy Manager are used to highlight opportunities for better use of energy.

OUTPUTS

STRATEGIC
1. Models of utilisation for different ways of working
2. Sustainability programmes

DELIVERY
1. Utilisation data of all assets and services
2. Trend analysis of utilities and services
3. Space planning services that support moves and installs

SOURCES
ISO 14001 Environmental Management Systems – Requirements and guidance for use
ISO 15392 Sustainability in building construction — General principles
The Facilities Management Professional Standards Framework
IMPROVEMENT MANAGEMENT

DEFINITION
The management of all processes aimed at improving in a cost effective manner the workplace experience and the performance of service delivery processes.

SUMMARY
Seeks to ensure that failures in the workplace and services are dealt with swiftly and economically through the engagement of all people involved in their delivery. It involves processes which capture, develop and implement innovations in the provision of the workplace services.

BEST PRACTICE
1. Maintaining detailed and full records of all failures
2. Systematic detailed analysis of the root causes of problems identified
3. Actions identified to remove such root causes.
4. All such actions are included in Quality Improvement Plans
5. Post implementation reviews carried out and lessons learned are included in Quality Improvement Plans
6. SLAs are reviewed in the light of quality performance criteria.
7. Encouragement of a culture of Quality Improvement across the entire supply chain.

OUTPUTS

STRATEGIC
1. Quality Improvement Plans
2. Review of service quality provided by suppliers
3. Working with suppliers, support awareness programmes aimed at reinforcing a culture of Quality Improvement and innovation.

DELIVERY
1. Resolution of day to day problems.
2. Regular detailed analysis of failures and problems
3. Monitoring action against the Quality Improvement Plans.

SOURCES
ISO 9000 Concepts behind the quality management systems and specifies the terminology used
ISO 9001 Requirement met to accord with the standard and gain certification
ISO 9004 Guidelines for performance improvement
BS EN 15221-3 Guidance on Quality in The workplace Management
EFQM Excellence Model - European Foundation for Quality Management
6 sigma
The Facilities Management Professional Standards Framework
RISK MANAGEMENT

DEFINITION
The management of all forms of risk that impact upon the ability of people and the workplace to work effectively. It covers the identification and analysis of sources of risk and those practices that minimise its impacts as well as how recovery from failures and disasters will be handled.

SUMMARY
1. The scope of risk management includes:
2. Security of physical and information assets
3. Health & Safety risks to people.
4. Risks arising from change and projects
5. Risks to the effectiveness of work arising from failure of delivery of services
6. Environmental risk
7. Business continuity Planning

SOURCES
OHSAS 18001 – Occupational Health & Safety Management Systems
The Facilities Management Professional Standards Framework
ISO 22301 Business Continuity Management
ISO 27001 Information Security Standard
ISO 28000:2007 specifies the requirements for a security management system, including those aspects critical to security assurance of the supply chain.
NEBOSH National Examination Board in Occupational Safety & Health

BEST PRACTICE
1. Processes to regularly update understanding of business priorities from a workplace viewpoint.
2. Systematic tools and processes for identifying, evaluating and addressing risk
3. All changes and projects that have high impacts upon business priorities are risk assessed and are subject to an authorisation process.
4. A communication plan which covers awareness to health & safety, security and environmental policies is carried out.
5. Business Continuity Plans are in place and tested

OUTPUTS
STRATEGIC
1. Risk Management strategy and policies
2. Security strategy based upon corporate risk.
3. There are strategies that cover Health & Safety and protection of the Environment
4. Expertise in risk assessment
5. Continuous monitoring of major sources of risk
6. Identification of key areas of business and their reliance upon the workplace assets and services.
7. Alignment with IT risk management.
8. Business continuity plans in working order

DELIVERY
1. Systematic processes to identify and evaluate risks
2. Projects are evaluated and authorised appropriately according to the level of risk.
3. All major changes to working conditions are risk assessed and appropriate provisions made in change management plans
4. An effective physical security service is provided to protect assets.
5. Processes ensure that the health and safety of people at work are protected.
6. Fire and evacuation drills are regularly done.
7. Security services meet requirements
CHANGE MANAGEMENT

DEFINITION
The promotion, management and support of changes in the way in which the workplace and services are used and managed.

SUMMARY
The overview of all day to day changes to services, moves and installs and the proactive change management that arises from complex organisational change and flexible working. It requires collaboration with IT, HR and the organisation itself.

BEST PRACTICE
1. Formulation of strategies and processes that support effective changes to locations, space, technologies, systems, processes, behaviours and services
2. Active management of politically complex change programmes
3. Policies and processes that cover routine moves and installs integrated with those of IT
4. Processes which ensure continuity of services on changes to supplier
5. All significant changes and projects are systematically risk assessed for impact on FM
6. Proactive support and encouragement for change resulting from flexible forms of working

OUTPUTS

STRATEGIC
1. Appropriate Change Management policies and procedures
2. Training in managing complex change
3. Oversight of major projects
4. Championing opportunities for flexible working

DELIVERY
1. Routine moves and installs are planned and managed
2. Changes are regularly reviewed with IT

SOURCES
Prosci 3 Phase Change Management process
Change Management – The People Side of Change 2nd edition
The Facilities Management Professional Standards Framework