



# A CAFM CASE STUDY: THE WHOLE ENCHILADA

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presented by

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## Introduction

- Purpose
  - To provide key to making “right decision” regarding CAFM System procurement, selection and implementation
  - To share some “do’s and don’ts” about selection/procurement
  - To provide Reality Check: What it really takes to implement
- Format
  - Trace project tasks beginning with a Business Process Review
  - Present overlooked considerations in the procurement process
  - Discuss commitments essential to successful implementation

## The Reality

- Software selection is difficult
- Opportunity usually happens only once, so “get it right”
- Implementation is often an “after thought” and often not included in the budget

## Review & Analysis of Function

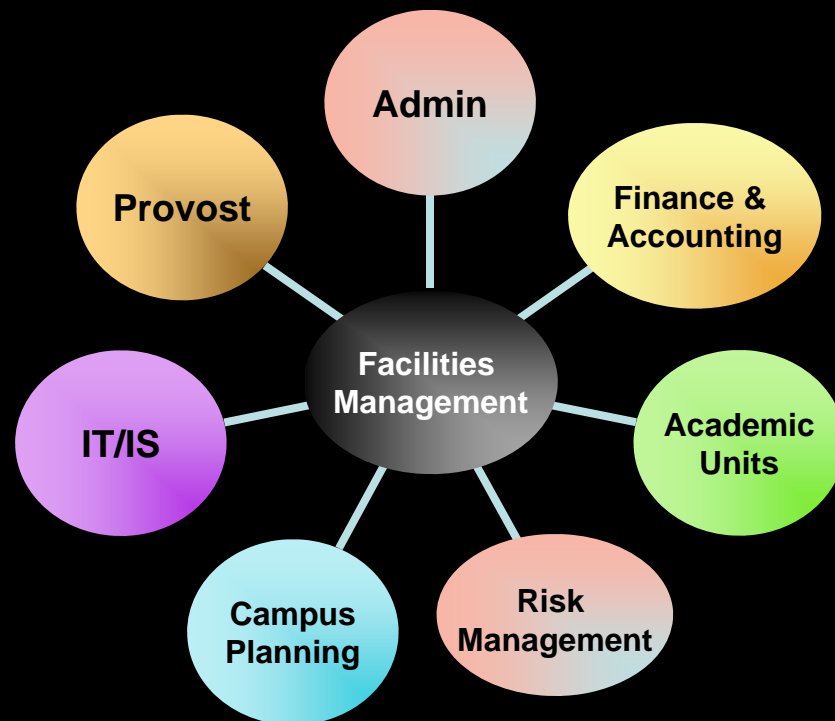
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## Review & Analysis of Function

- Need to clearly define requirements
- Requirements driven by Business Processes
  - Are you using the business processes to define the requirements for your CMMS/CAFM, not the other way around?
  - Will your CMMS/CAFM system be widely available to those who need it?
  - Will your CMMS/CAFM “talk” to other systems?

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## Review & Analysis of Function

- Need to clearly define requirements
- Requirements driven by Business Processes
- Departmental Interfaces
- Deliverables
  - Current State
  - Future State
  - Gap Analysis
  - Recommendations



## Strategic Plan Development

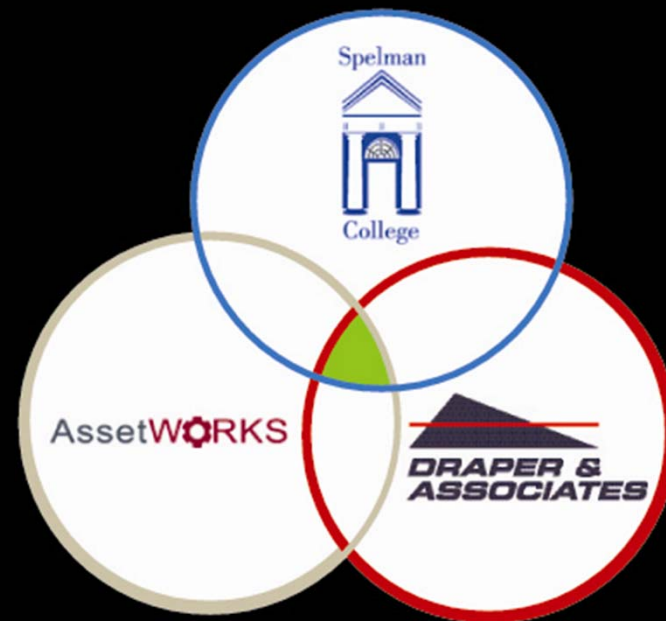
- Critical, often overlooked, next step
  - Establish a mutually agreed upon work plan, schedule and progress monitoring procedures
  - Set stakeholder expectations, develop a common understanding of project details and control the project throughout its' duration

## Strategic Plan Development

- Critical, often overlooked, next step
- Formal, hard copy document
  - Components typically include:
    - Project Background
    - Goals and Objectives
    - Scope
    - Deliverables
    - Constraints/Assumptions
    - Schedule and Milestones
    - Budget
    - Risk Assessment
    - Quality Management
    - Change Control
    - Roles/Responsibilities
    - Approval sign-off

## Strategic Plan Development

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## Strategic Plan Development

- Critical, often overlooked, next step
- Understand project staffing needs and ensure commitment
- Consider outsourcing project manager role
  - Leverages FM Staff Time
  - Expertise in Project Management
  - Knowledge of “Do’s and Don’ts” in other Higher Ed environments

## Strategic Plan Development

- Critical, often overlooked, next step
- Understand project staffing needs and ensure commitment
- Consider outsourcing project manager role
- Software is NOT the solution; only an Enabler
  - Don't think only in terms of budget for the software
  - Think in terms of commitment for up-front planning to ensure success

## RFP Development

- Determine who will write the RFP
  - FM Staff
  - Third-party Consultant
  - Institutional Procurement Office

## RFP Development

- Determine who will write the RFP
- Advantages of Third-party Consultant
  - Experienced in CAFM RFP Preparation
  - Hopefully, assisted in Requirements Definition
  - Broad Focus on Organizational Needs

## Solicitation/Procurement

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## Solicitation/Procurement

- Determine who will manage Solicitation/Procurement
- Advantages of Third-party Consultant
  - Detailed documentation during discussions with Proposers
  - Ability to sift through pricing to achieve “apples-to-apples” comparisons
  - Preparation of evaluation template and scoring guidelines
  - Preparation of key questions for Proposers’ references
  - Negotiations



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## Implementation

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- Critical aspects of implementation:
  - Engage and monitor project controls
  - Focus activity coordination to ensure timely completion of tasks.
  - Facilitate issue identification, resolution and implementation.
  - Prompt and timely resolution of critical issues.
  - Clearly communicate project status.
  - Manage scope



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- Critical aspects of implementation
- Achieve common goals and objectives through planning and executing the project in a coordinated fashion

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- Implementation costs money – include it in your budget
- Plan on spending an amount for implementation equal to the software
- Having accurate data, in an electronic format, greatly facilitates implementation and helps reduce costs



## Summary

- Goal was to present “The Whole Enchilada” to help frame the thought process and totality of tasks that should be considered in undertaking the selection and procurement of a new CAFM application.
- Hopefully, you will leave this presentation with more than you came with...



## Closing

- Thank you for your attention
- Questions?



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