



A CAFM CASE STUDY: THE WHOLE ENCHILADA

presented by

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GEORGIA ASSOCIATION OF PHYSICAL PLANT ADMINISTRATORS

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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

- Need to clearly define requirements

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- 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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- Departmental Interfaces



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

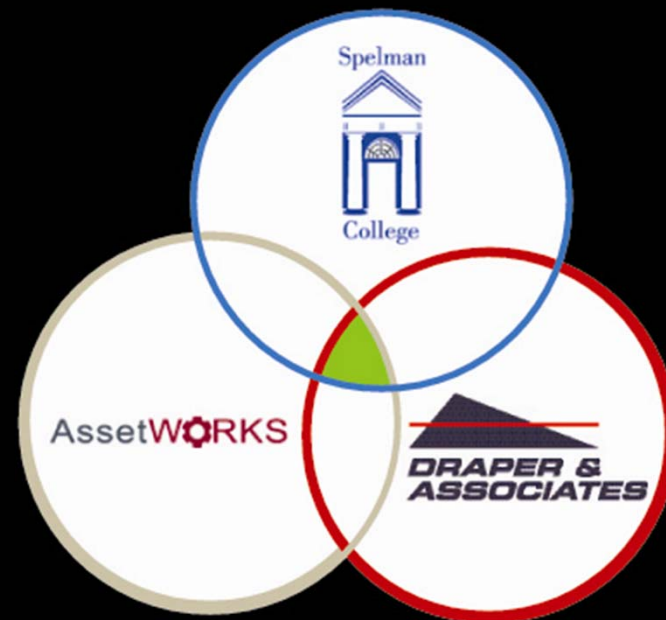
- Critical, often overlooked, next step
 - Establish a mutually agreed upon work plan, schedule and progress monitoring procedures
 - Set stakeholder expectations, develop a common understanding of project details and control the project throughout its' duration

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

- Determine who will manage Solicitation/Procurement
 - FM Staff
 - Third-party Consultant
 - Institutional Procurement Office

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

Lessons Learned

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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...



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Closing

- Thank you for your attention
- Questions?



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