

CAFM best practice

PLANON SYNOPSIS

For over 25 years Planon software has been helping some of the world's biggest and best known companies intelligently manage their workplace operations and real estate assets. With around 300 employees and an R&D budget of approximately 20% of annual turnover Planon is able to respond and even anticipate the need of its 1300-plus customers. Planon has offices in Europe, the USA and India and has a growing global Partner Network.

At Planon, we see the successful organisational implementation of an 'Integrated Workplace Management System' as made up of two basic components; firstly a project control and command structure and secondly, specific implementation work-packages

recruiting 'best-practice-practised' experience to your project implementation team is a high priority.

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INTRODUCTION

When I see the term 'best practice', I often wonder if this is a missive to train in a particular subject or if it is a reference to the best way of doing something!

With reference to CAFM system implementation, this dual meaning is entirely appropriate, as those who have been through the process will no doubt agree. Prior experience or a practised approach, as in most things, helps enormously and when this is combined with proven standard set-ups or blueprints then significant savings can be made.

However, for most organisations embarking on a CAFM/IWMS implementation such a 'best practised' approach is not likely to be immediately available within the client team. CAFM systems, and more so with comprehensive Integrated Workplace Management Software solutions like Planon, touch virtually all secondary (supporting) processes within modern organisations from soft FM to hard FM services and from corporate real estate to supply chain integration. As such, the implementation of these systems should not be undertaken lightly nor without due consideration and planning. Success is required first time and the project must run on time and on budget, so

of) the industry accepted project management method, Prince2. PIM2 is used by our professional services teams on a daily basis and is scalable for use in small medium and large scale (multi-national) implementation projects. Our best practices and implementation scenarios represent our accumulated experience in over 1300 implemented customer solutions and are central to the success of our solutions.

Software does not implement itself, and once a project is agreed and software purchased it needs to be carefully introduced to the organisation in a controlled manner and according to an agreed timetable. In this article I will focus on the vitally important issues surrounding proper project set-up and control, without which any project is compromised from the very outset. This is not intended to be detailed 'how-to' instructions but simple and I hope practical guidance.

DO YOU KNOW WHERE YOU ARE GOING?

If you don't know why or where you are going, how will you know when or if you arrive?

For any project to be successful you need to

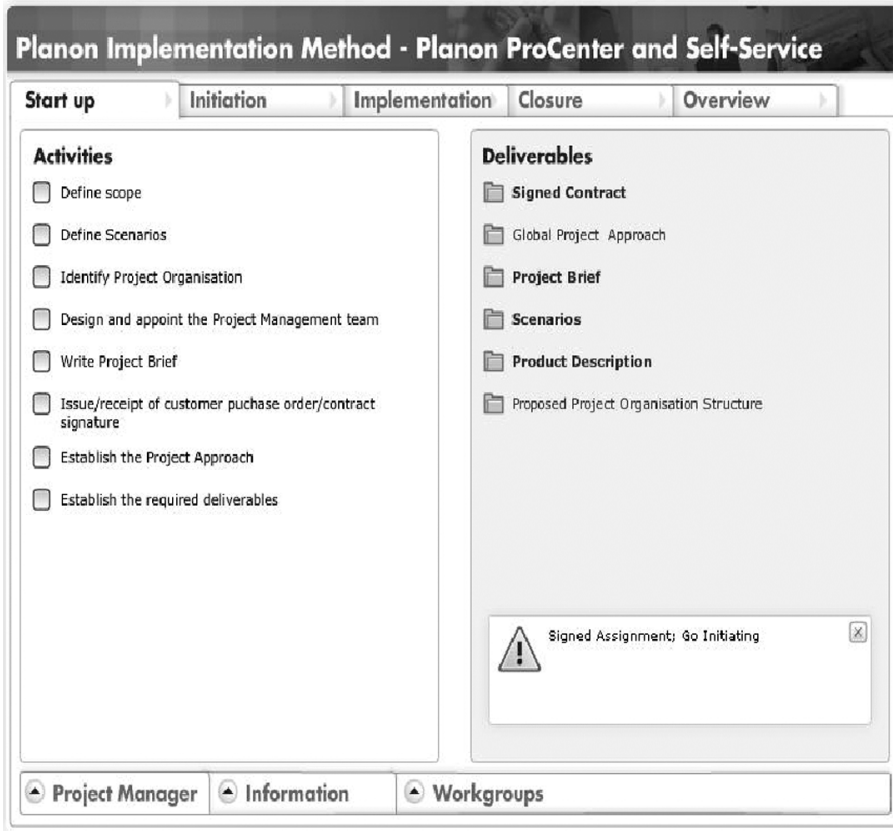


Figure 1 — Planon's PIM2 structure

know your objectives and ultimate goals. All too often systems get implemented with indistinct or non specific purposes apart from the ubiquitous 'we want to do things better'. Whilst this is an admirable objective it is not SMART: specific, measurable, achievable, realistic, and time-bound. Many projects (in any field) are unable to prove their success simply because they had no SMART objectives. So do take time to identify the specific expected business benefits and goals that the system, once implemented, will deliver. Once documented and quantified these expected benefits can be used to measure the success of the resultant solution at the end of the project.

DO YOU HAVE A MAP TO GUIDE YOU?

Many projects are doomed to fail before they have even started due to poor or absent

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project planning. To avoid this trap, you need a project control document that simply and completely describes the project. Prince2 describes this document as a **Project Initiation Document** or PID. Other methodologies have other terms; however it is described, you need one! You can ask the company who is providing your system to provide this document as part of their implementation services.

As a minimum your PID should contain the following:

THE PROJECT AIMS AND OBJECTIVES

Specific reasons for implementing the system and, if possible, backed up by the Business case.

THE SCOPE

What's included and what isn't. Scope 'creep' is an often cited complaint from both suppliers and customers. Be clear about the specific elements included in the delivery. Be aware that over-simplification at this stage, whilst making an easy ride in creating the PID, will cost you time and effort later if you are not clear about what should be delivered.

RELATIONSHIP WITH OTHER PROJECTS

Set the context of the CAFM/IWMS project in relation to other projects in the organisation. This may help in confirming / reaffirming the significance of this initiative as part of wider reaching business process improvements and identifying any otherwise unforeseen risks.

PROJECT ORGANISATION STRUCTURE

Often the responsibilities for steering a project through its life-cycle are unclear. Various roles are often duplicated under one individual, leading to confusion and potential conflicts of interest. As a result there is little or no control, and the project wanders aimlessly and eventually fizzles out. It is vital at the outset to clearly define the roles in the project and who will assume responsibility for each. As a minimum the following roles should be identified:

- Business Executive – has ultimate responsibility for the project and the delivery of the business case. He or she has responsibility for the project budget and is supported by the Senior Supplier and Senior Users (collectively the Project Board)
- Senior User – is the representative of the end users of the system and approves the delivered results.
- Senior Supplier – provides the project deliverables in accordance with the project scope.
- Project Manager – The Project Manager is given the authority for the day-to-day running of the project within the limits (tolerances) set by the Project

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Board. The Project Manager must ensure that the project delivers the desired end products on time, within budget and to the agreed quality level.

- Project Work Team/Work Groups – The Project Team / Work Groups are responsible for the delivery of the ‘products’ in accordance with the project scope and specification indicated by the Project Manager and the Senior User.

Be sure to identify and include all the necessary stakeholders in the project, as failure to get the buy-in from key stakeholders like corporate IT can have dramatic conse-

quences to the smooth-running of your project and has the ability to derail the project up to the very last minute!

INITIAL PROJECT PLANNING – WHICH DELIVERABLES AND WHEN?

It is essential that a project plan is drawn up, together with target dates for each phase or package of deliverables and with ‘go-live’ dates. Very often projects are left open-ended (or Phase 2 is simply said to follow phase 1 when it is complete!) This means that a target project completion date must be defined at the outset of the project and an overall high level project time-frame. This doesn’t mean it can’t be changed, nor does it mean you need a highly complex Gantt chart or critical path plan at this stage (although a thorough understanding of dependencies is pre-requisite) but clear targets need to be set for the delivery of all the business solutions identified within your project scope eg Reactive & Planned Maintenance, Finance System Integration, Service Desk, Real Estate Transaction Management etc.

COMMUNICATION & CONTROL MECHANISMS

Your PID should describe how the project organisation will communicate with each other and what tools will be used to monitor and control progress, bi-weekly conference calls or face-to-face meetings? This should be explicit and once agreed, rigidly adhered to.

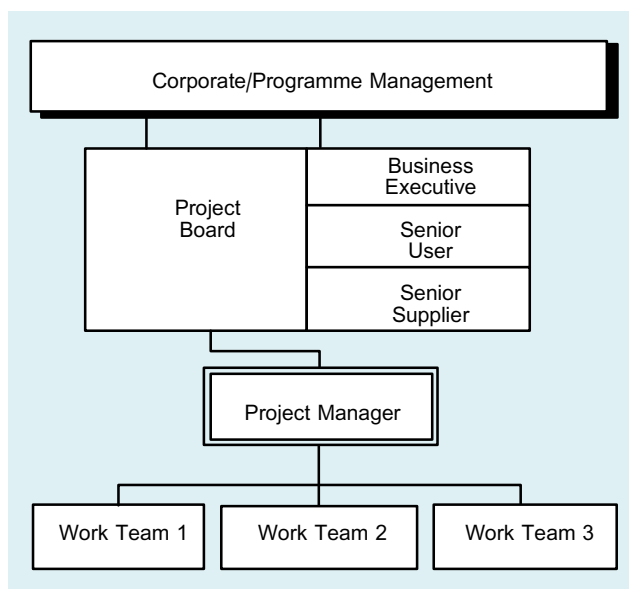


Figure 2 – Basic Project Roles

Whilst the text-books might say that the sign of a good project is 'plain-sailing', reality dictates that it would be naive not to expect to encounter some turbulent seas on route to the destination. Every project evolves to a certain degree and faces unforeseen challenges as it progresses. A framework therefore needs to be in place at the outset to accommodate a potential need to change direction to some extent or adapt to a new challenge. This is provided of course that this can be agreed with the Project Board and that it doesn't undermine the goals or business case of the project. To this end, the Project Manager should deploy an 'issue' log; a very simple but effective mechanism to capture all and any project issues from the project team members. Issues are managed to eventual resolution by the Project Manager, who where relevant, raises change requests or project exception reports for approval or otherwise by the Project Board. This is necessary for situations where in order for an issue to be resolved, extra resources are required, or where there are likely to be changes to the expected delivered solution.

Periodic highlight reports (as per the agreed frequency) from the Project Manager to the Project Board are used to communicate progress of the project as per the agreed plan defined in the PID. Do make specific provision for an end of project review/report too, where you can report back on how well the project performed against the plan and expected business case. This aspect may need to be revisited at various intervals post go-live before benefits can be properly quantified.

RISKS?

Finally, a list of known risks to the project should be drawn up together with counter measures and an

assessment of their impact. The objective here is to understand as far as possible what might stand in the way of your project's success, and through this exercise mitigate against potential threats at much as possible at the outset.

READY TO START?

The next step is to pull the entire project team together for a project 'kick-off' meeting and to ensure that all parties understand and commit to the project deliverables and time-scale. This really is a very important step as it ensures that the Project Team share a common goal (ie the success of the project) and that there is a motivating and enthusiastic project start.

Once the PID is signed-off by the Project Board the project can start in earnest.

Some might argue that an approach as outlined above is overly academic and overkill, but for those who think this, I would remind them that the old

adage 'fail to plan, plan to fail' holds true. A few hours planning now will seem very well spent when your CAFM / IWMS implementation project is delivered on time and on budget! Whilst the implementation 'work-packages' are now just beginning and there is plenty to do before you can crack open the champagne on go-live day, you can be confident that your organisa-

tion will know what is to be delivered, by when, by who (and who will be involved) and how the project will be controlled. Furthermore, your project will have been launched with the benefit of **practised** principles and will have the very **best** chance of success.

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