e-Book

INTEGRATED DIGITAL ESTATE ASSETS (I.D.E.A)

Where are you on the maturity model?

bellrock

The Leading Light in Technology Enabled
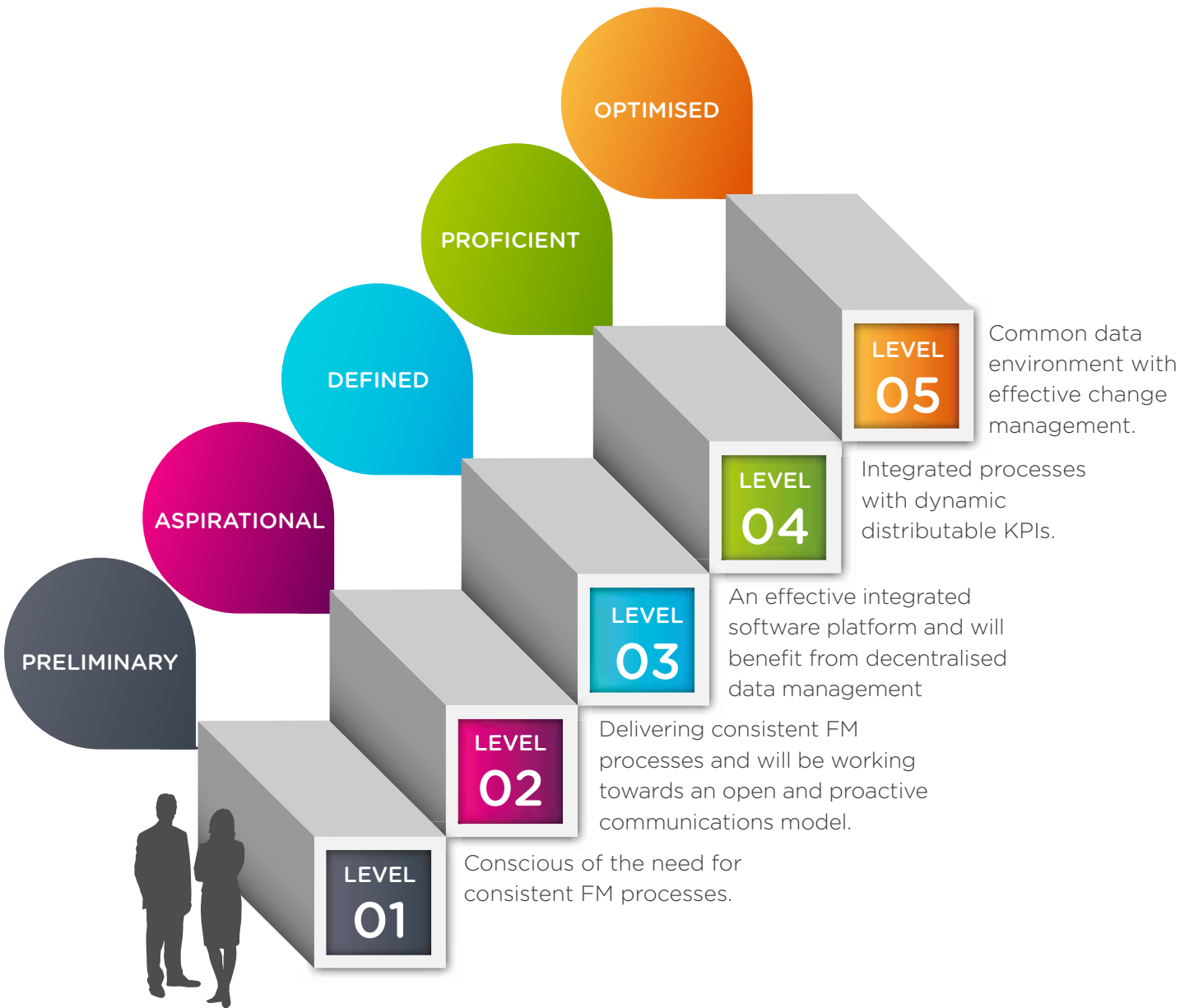Facilities Management & Property Services

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THE MODEL

The Integrated Digital Estate Management Maturity Model we have defined is based upon 5 levels from a basic preliminary stage through aspirational, defined, proficient and reaching a final optimised level. These levels are measured by 7 factors to enable the reader to understand where they are on the IDEA Maturity Model.

OPTIMISED

PROFICIENT

DEFINED

ASPIRATIONAL

PRELIMINARY

LEVEL 05
Common data environment with effective change management.

LEVEL 04
Integrated processes with dynamic distributable KPIs.

LEVEL 03
An effective integrated software platform and will benefit from decentralised data management

LEVEL 02
Delivering consistent FM processes and will be working towards an open and proactive communications model.

LEVEL 01
Conscious of the need for consistent FM processes.

	LEVEL 01 Preliminary	LEVEL 02 Aspirational	LEVEL 03 Defined	LEVEL 04 Proficient	LEVEL 05 Optimised
Effective Integrated Software Platform — A web/cloud based software system with mobile access that is modular, configurable and perfectly integrated for reporting.			✓	✓	✓
Effective Change/Variation Management — Change based on accurate data that feeds into standard operating procedures with effective communication considering all the implications.					✓
Common Data Environment — This involves everyone in an organisation looking at data through the same lens with a well governed common data taxonomy.					✓
Multi-Disciplined Engaged Processes — FM processes need to be consistent across all functions within the organisation with start to finish engagement for all activity.	✓	✓	✓	✓	✓
Integrated Processes — Efficiencies and benefits arise from integrated processes based on a central hub of information that powers systems across a business.				✓	✓
Open Proactive Communications — The ability for the multi-disciplinary team members to effectively communicate with one another based on a common data approach.		✓	✓	✓	✓
Dynamic Distributable KPIs — In brief terms if it can't be measured it can't be managed. Any robust integrated process requires the ability for that process to be measured.				✓	✓

01   PRELIMINARY

At the preliminary stage of IDEA you will be working towards conducting consistent FM processes across all functions in your organisation. However, due to no effective integrated software platform your data will be inaccessible and heavily dependent on manual intervention. It will be difficult to obtain a real-time picture of what is happening across your facilities.

You may find that decision making is difficult due to lack of visibility and could suffer from multiple contacts to establish for example status of repairs. Reporting will likely be onerous and it will be hard to adapt your processes as your business changes.

02   ASPIRATIONAL

At the IDEA level of Aspirational you will see the value and be delivering consistent FM processes and will be working towards an open and proactive communications model. You recognise that with consistency across all your functions, FM processes will be communicated effectively and delivered effectively.

Whilst you may suffer from unilateral decision making based on incomplete operational data and lack of visibility you will be communicating what is happening across your FM processes. Measuring what is happening will be more difficult and you will likely suffer from inefficiencies.

03   DEFINED

With the Defined level of IDFM you will have invested in an effective integrated software platform and will benefit from decentralised data management. This coupled with conducting and communicating consistent FM processes across all functions in your organisation will be a huge step towards defining your FM approach.

It's possible that you will not have a common data environment and therefore change management and management by exception will not be possible. This will likely cause issues and limit the ability to measure and manage performance.

04   PROFICIENT

Within a Proficient FM level of IDEA you will have integrated processes arising from adoption of an effective software platform mapping your FM activities. With this level of integration you will be able to start distributing dynamic KPIs to better manage and measure your FM operations.

Whilst you will be benefiting from several efficiencies you may be held back by lack of adoption of a common data environment which will in turn make it difficult to effect variation and changes to processes.

05   OPTIMISED

An Optimised IDEA model is derived from an effective integrated software platform that incorporates a common data environment enabling optimised FM working processes. With integrated processes and performance measures it is possible to manage by exception and effect change management processes based on open and proactive communications.

A complete multi-disciplinary engaged process from start to finish enables both efficiencies and optimisation of practices such as call, response and resolution. Together with mapped and integrated processes organisations are able to function more effectively, benchmark performance and manage their FM operations more efficiently.

01 PRELIMINARY

At the preliminary stage of IDEA you will be working towards conducting consistent FM processes across all functions in your organisation. However you will likely be facing numerous challenges across your FM operations:

Lack of or Ineffective Integrated Software Platform

At this level you will not derive the benefits arising from using a web/cloud based software system with convenient mobile access. As a result you will suffer from hard to get at data and be reliant on multiple manual processes. Reporting will be difficult and it may be hard to obtain a real time picture of what is happening in your FM operations. Co-ordination will be difficult and it may be hard to establish what the status of jobs is without multiple contact points. Decision making will based on incomplete data.

Ineffective Change and Variation Management

At this level without access to accurate data mapped against standard operating procedures change will be difficult and present risks. It will be hard to consider all the implications of change and without an effective communications model it will be difficult to implement. Situations may present that are at odds with reality and it will be extremely difficult to effectively consider all the consequences of change from the FM operational perspective, across all business functional areas.

No Common Data Environment

At this level FM operatives and business functions will be looking at data in different views without definition and effecting different decisions accordingly. It will be likely that processes have not been modelled end to end and different data environments will render reporting ineffective. Asset and FM databases may be defined and categorised in different ways resulting in difficulties in comparing for example suppliers and performance against SLA's.

The handover between functions will be difficult and you will likely not be using SFG20 and NRM3 taxonomy.

Poorly Integrated Processes

At this level no single view of your FM processes exists and it will be impossible to derive the efficiencies and benefits that arise from integrated processes based on a central hub of information-powering systems across both FM operations and your business.

Benefits such as attending a reactive job and also being able to address any planned activities whilst on site are likely impossible. The use of integrated processes would enable this kind of picture to be painted and efficiencies to be realised.

There could be variations in data across functions and it will be difficult for individuals across FM operations and the business to make decisions. Performance measures will be fragmented and once again making changes will be difficult.

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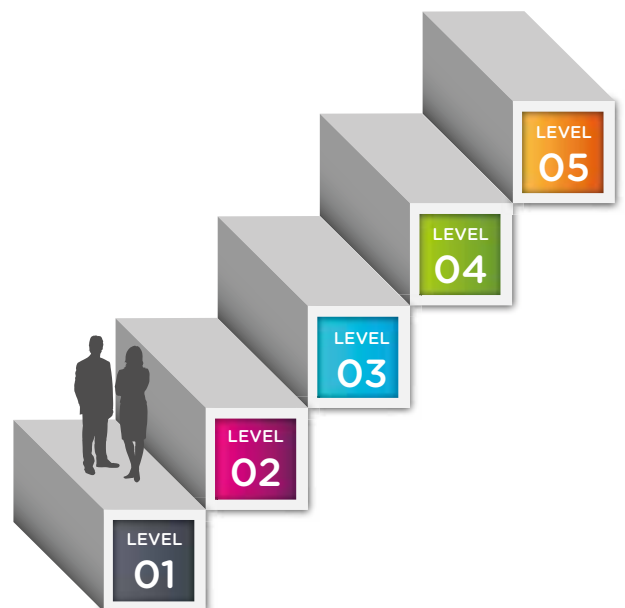
Lack of Open Proactive Communications

At this level communications will be vital, but without an integrated software platform and common data environment, communications are likely to be unfocused and reactive.

There is likely to be the propensity for unilateral decision making which can prove inefficient and disruptive. With no access to operational data to drive and structure communications opinions are formed potentially without factual basis.

Ill-discipline can lead to multiple independent discussions that impact on the ability to be effective in a negative way. There are likely to be no best practice examples of communications such as Cross Functional Comms Cells allowing individuals within functions to come together in an ordered and controlled manner.

Dynamic Distributable KPIs

At this level without an integrated software platform or joined up multi-disciplinary processes measurement will be difficult. Also without joined up multi-disciplinary processes it will not be easy to define key activities and their statuses that drive data for associated key performance indicators.

In brief terms if it can't be measured it can't be managed. It will likely be difficult to effectively performance manage your people or FM processes. Assigning responsibility and facilitating change to key performance areas is critical. Any robust integrated process requires the ability for that process to be measured and without it ownership and accountability will be difficult to assign.

Preliminary Level Capabilities

Multi-discipline engaged processes – At this level you are likely to be working towards consistent FM processes across some of the functions in your business. You are trying to work in a joined up way and are starting to define operating procedures to enable you to work together.

It's possible you are looking at your processes and even mapping FM jobs from start to finish identifying key operators that you need to engage and data that you need to share. Potentially you are having regular discussions between your functional leads to understand how performance impacts on each other in a process.

Without the means to share data and drive relevant and pro-active communications it will be hard to integrate your processes across all functions, share a common data environment, and implement effective change management.

If you are finding some of the following pains it could be time to evaluate your FM processes and invest in moving to the next level of the Integrated Digital Facilities Management model.

- It is hard to get at data and you are reliant on multiple manual processes.

- Reporting is difficult and it is hard to obtain a real time picture of what is happening in your FM operations.

- Co-ordination is difficult and it is hard to establish what the status of FM jobs is without multiple contact points.

- You have to make decisions based on incomplete data.

- Without access to accurate data that is mapped against standard operating procedures you find that making change is difficult and presents risks.

- It is hard to understand the implications of change.

- You don't have an effective communications model and find it is difficult to implement change.

- You find that situations present that are at odds with reality and the field.

- You are looking at data in different views without definition and effecting different decisions accordingly.

- It is difficult to compare for example, suppliers and performance against SLAs.

- Benefits such as attending a reactive job and also being able to address any planned activities whilst on site are not possible.

- Performance measures are fragmented.

- Your communications unfocused and reactive and there's a propensity for unilateral decision making which can prove inefficient and disruptive.

- You find that opinions are formed potentially without factual basis.

- It's not easy to define key activities and their statuses that drive data for associated key performance indicators.

- It's impossible to derive the efficiencies and benefits that arise from integrated processes based on a central hub of information.

If you are experiencing these issues see the next maturity level – Aspirational, to understand where it may be possible to focus on to improve your IDEA maturity.

At the aspirational stage of IDEA you are starting to have a better understanding of where the issues are across your FM processes and you will have a vision of what you would ultimately like to see in place across your FM operation:

Lack of or Ineffective Integrated Software Platform

You are still relying on multiple manual processes in order to process your data. Communication is slow, data is not 'real-time', so you are always responding to historic and at times, altered situations.
You recognise that you need to gain a better understanding of what is happening across your FM operations. You want to get to the point where you have better coordination of operations and related data allowing you to improved decision making.

Ineffective Change and Variation Management

You recognise the need for accurate data mapped against standard operating procedures in order to reduce risks. You understand that you need an effective communications model which will allow you to consider the implications of change more effectively and how this can be implemented.

No Common Data Environment

You are aware that there is no commonality across your various FM sites and business functions. Everyone is looking at data in different views, without definition and effecting different decisions accordingly. You would like to have a consistent model across your data environment which will provide more effective reporting. You would like to have more defined asset and FM data which will allow for comparison across supplier cost, performance and greater compliance with industry and statutory standards.

Poorly Integrated Processes

You recognise the need for a single view of your FM processes in order to derive the efficiencies and benefits that would arise from an integrated process based on centralised information.

You are cognisant of the benefits of bundling jobs allowing planned activities to be undertaken when engineers are attending a reactive job. You would like to generate efficiencies and save on cost and recognise that these integrated processes would provide this.

You understand that variations in data functions, makes it more difficult for individuals across the business to make decisions. You aspire to have a fully integrated process which would centralise supplier performance data allowing performance management to be consistent and more effective.

Dynamic Distributable KPIs

You aspire to a system that allows you to have a better handle on your business. You recognise that your data is not satisfactory. You have insufficient measures in place to allow you to manage your supply chain effectively. You know that you need joined up multi-disciplinary processes which will allow you to define key activities, set measurable parameters and measure and manage your suppliers more effectively.

Aspirational Level Capabilities

Multi-discipline engaged processes – you recognise that you need consistent FM processes across all of your business area. You see that you need to work in a joined up way and know that you need to define operating procedures to enable collaborative working.

You are starting to look at your processes and mapping FM jobs from start to finish identifying key operators that you need to engage and data that you need to share. Potentially you are having regular discussions between your functional leads to understand how performance impacts on each other in a process and how you need to tackle this to get to a position where you work more collectively.

You have determined that you need a process whereby you can share data and drive relevant and pro-active communications, integrating your processes across all functions, sharing a common data environment, implementing effective change management.

Open proactive communications – communications have improved and are more focused on achieving an optimised model. Decision making has become more collective and thereby, efficient. You have a view of what you would like to glean from your operational data and you recognise that you need a common data approach.

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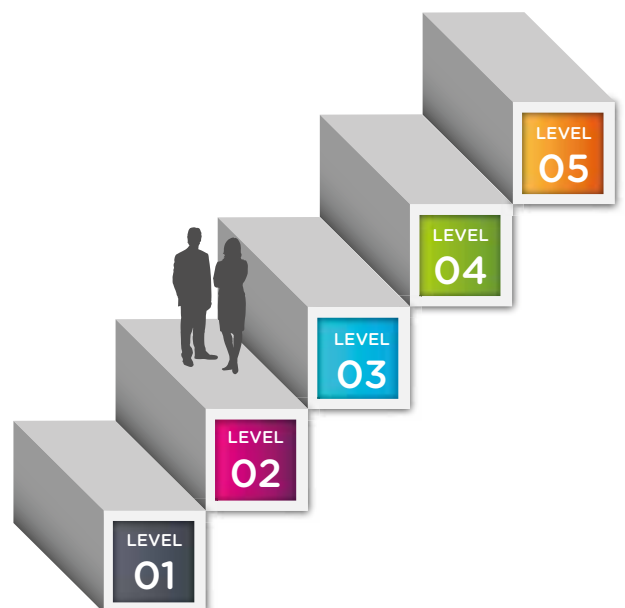
03 DEFINED

At the defined stage of IDEA you will have a clear understanding of what you need to do to obtain consistent FM processes across all functions in your organisation. You will likely be still facing challenges across your FM operations but with the acquisition of an integrated software platform, you will have a defined path of where you want to take your operations to and how you will get there.

Ineffective Change and Variation Management

With the acquisition of an integrated software platform you now have the opportunity to effect change to your standard operating procedures. An effective communications model will allow you to consider where changes are necessary. You need to understand how the software can support you to define a systematic approach towards analysis, decision making and change implementation.

No Common Data Environment

Your new integrated software platform presents an opportunity to centralise your FM operations and business functions. Processes can be modelled and implemented giving your business a defined data environment and a common reporting system, making it more effective to monitor supplier performance against SLA, benchmark and ensure that your business remains compliant.

Poorly Integrated Processes

You now have the opportunity to gain a single view of your FM processes which will allow you to derive the efficiencies and benefits that will arise from having integrated processes based on a central bank of information. For example benefits such as attending a reactive job and also being able to address any planned activities whilst on site are now possible.

You will have a defined plan of how you will integrate your data across functions and decision making will become easier. Performance measures will become clearer and the opportunity to effect change will be enhanced.

Dynamic Distributable KPIs

With an integrated software platform the opportunity to measure supplier performance and cost will be evident. With the onset of joined up multi-disciplinary processes it will be easy to define key activities and measure their status against key performance indicators.

The opportunity to effectively performance manage your people or FM processes, assigning responsibility and facilitating change to key performance areas is more defined. Ownership and accountability will be easy to assign.

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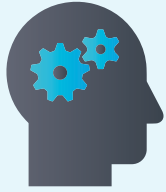
Defined Level Capabilities

Effective integrated software platform – you will be starting to recognise the benefits arising from using a web/cloud based software system with convenient mobile access. As a result you will no longer have to be reliant on multiple manual processes. Reporting will be easier and will provide you with a real time picture of what is happening in your FM operations. Co-ordination will be more defined and will help you to establish the status of jobs without having to make contact with multiple points or operatives. Decision making will be based on complete data and will enable you to determine a clearer way forward for your operations.

Multi-discipline engaged processes – you have now invested in an integrated software platform which you recognise will provide you with consistent FM processes across all of your business areas. It will allow you to work in a joined up way, define operating procedures and facilitate collaborative working.

You now have the tools to look at your processes and define a method for mapping FM jobs from start to finish identifying key operators that you need to engage and data that you need to share. You are now in a position where you can define better, more collective working practices amongst your functional leads.

You now have the opportunity to determine a process whereby you can share data and drive relevant and pro-active communications, integrating your processes across all functions, sharing a common data environment, implementing effective change management.

Open proactive communications – the acquisition of an integrated software platform provides the opportunity for you to create more proactive communication. Decision making can now have a defined set of parameters, be more efficient and based on a clear, common data baseline.
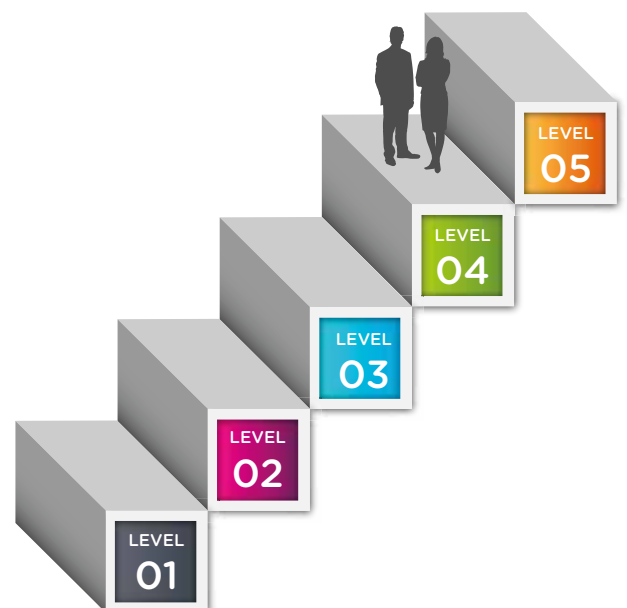
04   PROFICIENT

At the proficient stage of your IDEA journey, you will have utilised your software platform to map a suite of integrated FM processes. The challenges that you face will be reduced and you will be enjoying the majority of benefits available from a fully IDEA system.

Change and Variation Management

Effective change and variation management is enabled by your integrated software platform and the data that it provides, however this needs to be supported by a systematic approach to analysis and decision making and change implementation. Effective change management requires the involvement of all relevant stakeholders, adoption of standard operational procedures, testing and impact analysis, commercial variation agreement. The software supports a target operating model to deliver effective change

Common Data Environment

Your integrated software suite should provide a common data environment that enables everyone to look at common reports from the same data set. Implementation of common dashboards and reports are key to maximising efficiency and effectiveness. Common processes and reports will enable meaningful comparison and benchmarking. Common data utilising common taxonomy will allow data to be shared across users and disciplines. The common data environment provides easy data collection and maintenance.

Proficient Level Capabilities

Effective integrated software platform - your web or cloud based software system will be providing easy remote access to all appropriate stakeholders, high visibility of data and performance, automated data gathering and maintenance. Your employees are able to perform their responsibilities effectively with real time reporting, good communications, reliable management information and informed management and decision making.

Multi-disciplinary engaged processes – at this stage your support processes such as finance, legal, commercial and HR should be engaged with your integrated software and the outputs it creates to support them. The connection with other processes such as financial invoicing will be defined, timely and smooth. They will use common data language and enable all functions to perform to deliver the end goal of excellent delivery to the customer.

Integrated processes – your integrated CAFM software suite will enable you to consider and evaluate the impact of different processes on each other. For example, the ability to combine some planned maintenance with a reactive maintenance job should be available. The joined up processes will drive efficiencies into service delivery. The key is an integrated set of data producing uniform reports for use across multiple business functions. Employee training records and qualifications is another area where full integration facilitates efficient processes.

Open proactive communications model – your software suite will be providing the capability for multifunctional employees to communicate effectively with each other – communications will be relevant and focussed between employees, customers and other stakeholders. Open communications will support decision making during normal operations and times of stretch and challenge.

Dynamic distributable KPIs – the integrated software suite will be providing an automatic collection and reporting of data against a predefined set of performance statistics. Performance measurement and reporting is joined up, transparent and easily communicated. Reporting and management becomes second nature based on reliable self-generated data. Performance improvement is driven from KPI reporting, evaluation and discussion. An automated set of performance data is transparent and auditable – the ultimate tool of performance management.

05 OPTIMISED

The optimised level of IDEA takes the systems, processes and target operating model developed at the proficient level and hones and refines them through continual improvement. At the optimised level it is about the small changes, incremental adjustments that deliver the ultimate performance.

Optimised Level Capabilities

Effective Integrated Software Platform - your web or cloud based software system will be fully adopted and operational. Employees and suppliers will be fully trained, reporting suites will be fully configured, remote access will be empowering all that use the system and management information will be readily available through online dashboards and printed reports. Your employees will be enabled to perform their responsibilities effectively maximising the potential of the system and promoting enhanced and timely decision making.

Change and Variation Management - at the proficient level we talked about effective change and variation management being enabled by your integrated software platform. At the optimised level the target operating model (TOM) will be fully developed around the software. The 2 elements of the complete system will be working in harmony ensuring efficient data gathering, communications, reporting, management information and decision making. Elements of the software and TOM will have been refined through a process of continual improvement to optimise the system for customers, employees and other stakeholders. With the software and TOM optimised change and variation decisions will flow and be implemented through a systematic and controlled process.

Common Data Environment - at the optimised level common data will be fully available to multifunctional teams delivering "one version of the truth". The common data will be fully integrated into the overall TOM. The data gathered will have been refined through a process of continual improvement ensuring that common reports are available to all. Dashboards will have been optimised for visual impact and messaging and will be used for meaningful comparison and benchmarking.

Multi-Disciplinary Engaged Processes - multi discipline processes such as finance, legal, commercial and HR will be engaged with your integrated software and the outputs it creates to support them. The connection with other processes such as financial invoicing will be seamless. The common data language and integrated operating procedures facilitate delivery of the end goal - "customer service excellence".

Integrated Processes - the fully integrated soft platform and TOM empower you to consider and evaluate the impact of different processes on each other. For example, the ability to raise a sales invoice quickly and accurately when the work is complete. An end to end integrated process forces efficiencies across the business to the benefit of the supplier and the customer.

Open Proactive Communications Model - at the optimised level your software suite will be providing the capability for multifunctional employees to communicate effectively with each other and customers. Communications will be concise, accurate and relevant. Lines of communication and communication etiquette will be prescribed to maximise efficiency and support decision making during normal operations and times of stretch, challenge and crisis.

Dynamic Distributable KPIs - the integrated software suite will be providing automatic collection and reporting of data against a predefined set of performance statistics. Review and adjustment of KPIs will be continual. Performance measurement and reporting is joined up, transparent and easily communicated. Reporting and management becomes second nature based on reliable self-generated data. Performance improvement is driven from KPI reporting, evaluation and discussion. An automated set of performance data is transparent and auditable – the ultimate tool of performance management.

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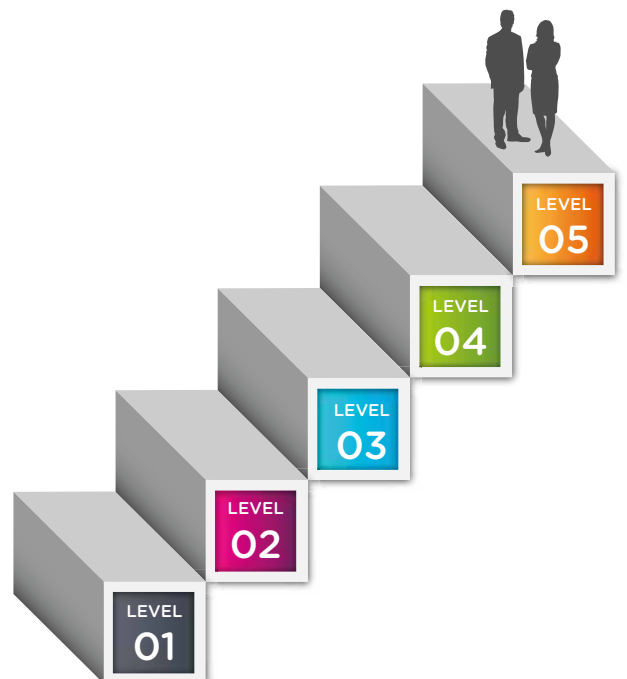
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WHAT TO DO NEXT

While there are clearly extensive benefits to be gained by operating at the very highest level of maturity, for many organisations getting to Level 5 is not a realistic or appropriate objective.

Our guidance would be to start by taking a close look at the challenges that define each stage and to be honest about your current maturity level.

Once you've agreed as a team what your current starting point is, take a look at the outcomes and benefits described for each stage and decide what is a realistic target level for you. The key is to balance the effort and resources needed, with the expected return on investment.

If you would like to explore any of the concepts covered in this guide, or would like a free assessment of your current maturity level and future requirements, then get in touch with us: enquiries@bellrock.fm