THE
WORKPLACE
MANAGEMENT
FRAMEWORK

Version 1.0

Dr Graham Jervis & Andrew Mawson

17th October 2014
CONTENTS

1 PURPOSE ................................................................................................................. 4
2 SCOPE ..................................................................................................................... 5
3 CRE, FM, IT, HR AND THE FRAMEWORK ......................................................... 6
4 THE BENEFITS OF AN INDUSTRY ACCEPTED FRAMEWORK ......................... 9
5 USING THE FRAMEWORK TO TRANSITION TO ‘WORKPLACE MANAGEMENT’ ....................................................................................... 10
6 COMPONENTS OF THE FRAMEWORK .................................................................. 12
7 STRATEGIC MANAGEMENT ................................................................................. 17
8 CLIENT RELATIONSHIP MANAGEMENT ........................................................ 25
9 PERFORMANCE MANAGEMENT ........................................................................ 28
10 SUPPLY CHAIN MANAGEMENT ......................................................................... 31
11 CAPACITY MANAGEMENT ................................................................................... 35
12 RESOURCE MANAGEMENT ............................................................................... 37
13 IMPROVEMENT MANAGEMENT ....................................................................... 39
14 RISK MANAGEMENT .......................................................................................... 41
15 CHANGE MANAGEMENT ..................................................................................... 45
16 PROJECT MANAGEMENT ................................................................................. 48
17 GLOSSARY .......................................................................................................... 53
18 ACKNOWLEDGEMENTS ................................................................................. 54
## Document Control

<table>
<thead>
<tr>
<th>Description</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft version 1 describes the Framework of the Management Capabilities.</td>
<td>November 2013</td>
</tr>
<tr>
<td>Draft version 2 incorporating feedback from group members</td>
<td>January 2014</td>
</tr>
<tr>
<td>Draft version 3 incorporating further feedback, addition of summary panels and strengthening links to CRE</td>
<td>March 2014</td>
</tr>
<tr>
<td>Final version 1.0 incorporating changes to name and further minor modifications.</td>
<td>October 2014</td>
</tr>
</tbody>
</table>
1 PURPOSE

The purpose of this document is to define a Framework for the management of the workplace... 'The Workplace Management Framework' (WMF). The Framework provides a structure for the development and subsequently the assessment of best practice in the management of the workplace.

The purpose of the Framework is to:

- Define the management disciplines needed to deliver the effective workplace.
- Maximise the strategic and economic benefit of the workplace to organisations as a business tool.
- Enable the development of best practice organisational and people capabilities for the management of the workplace.
- Communicate the management requirements needed to deliver the effective workplace to supply partners in a clear and unambiguous fashion.
- Measure the effectiveness of the organisation (internal and service partners) responsible for delivering the workplace.
- Communicate clearly the nature, purpose and structures associated with management of the workplace as a professional discipline to senior business leaders.
2 SCOPE

The WMF is designed to be applied to all types of workplaces and embraces ‘high tech’ workplaces, (including Power Stations, Data Centres and Industrial Premises), through to ‘high touch’ workplaces in which the support for the working activities of people is the primary purpose (these include offices, serviced offices, homes and people working on the move). In between these two extremes we have workplaces such as hospitals, schools, universities and prisons, which we also embrace within the WMF.

Traditionally the acquisition and management of the workplace has been predominantly the domain of the Real Estate and Facilities function, being concerned primarily with the effective operation of buildings. But as we move from ‘high tech’ workplaces to ‘high touch’ workplaces we see the role of ‘Workplace Management’ emerging as an integrator of contributions from across a number of disciplines (Real Estate, Facilities Management, IT, Human Resources, Risk, Security etc.) to deliver an economic and effective ‘workplace experience’ to an organisation’s people. The WMF is equally of value in achieving excellence in ‘high tech’ workplaces as it is in ‘high touch’ workplaces.
3 CRE, FM, IT, HR AND THE FRAMEWORK

The effective provision of the workplace requires close working between a number of functions including Corporate Real Estate, Facilities Management, Security, Risk, Information Management and Human Resources. Often these functions have their own drivers, languages and imperatives, but in order to provide the best value workplace for an organisation, these disciplines must find a unified set of goals linked tightly to the purpose and strategy of the businesses they serve. The WMF defines the capabilities needed to deliver effective workplaces regardless of the organisational units or supply partners that provide them.

Throughout this document we refer to ‘workplace leaders’ or ‘those with responsibility for the workplace’ often without referring to specific disciplines. This is deliberate as we feel that it is more important to define the management capability without linking it to a specific professional discipline. For completeness however, we include the following definitions.

**Corporate Real Estate**

Corporate Real Estate functions are predominantly associated with the acquisition, management and disposal of the physical building asset and as such play an important part in acquiring and disposing of workplace ‘capacity’.

*Corporate Real Estate is the practice concerned with the planning, acquisition, management, and administration of property on behalf of a company.*

**Facilities Management**

Today’s Facilities Management organisations are largely focused on the delivery of environments and services at best cost, often through contracts, with a range of service providers each delivering a single service or a cluster of services. Facilities Management as it is defined today is mostly about providing services and managing/changing physical environments.

*‘Facilities Management is the management of activities associated with the provision of services and environments to support the strategic purpose of the organisation’.*
Regardless of the procurement approach, bundling arrangements etc. there are some fundamental management disciplines that are needed to manage an effective service organisation and to ensure the alignment of its services and goals with the strategic purpose of the organisation. These capabilities demand expert knowledge, skills, processes and information which, if they exist, will ensure the effective running of the service organisation to achieve best value in the context of the organisation’s strategic business drivers. This document defines these capabilities within the WMF.

The Workplace Management Framework

We expect that the WMF will be of greatest value to leaders who are seeking to develop their organisations to achieve best practice in the management of the workplace. These may include:

- Facilities Managers and Directors
- Corporate Real Estate Managers and Directors
- Workplace Managers
- HR, Risk, Security and IT Directors
- Procurers of facilities services
■ Suppliers of facilities services
■ CRE Consultants
■ FM Consultants
■ FM training organisations

It is envisaged that the Framework will be used in a number of ways:

■ As a vehicle for presenting the industry to business leaders in an enhanced professional and ‘business relevant’ light.
■ As a model against which to develop the capabilities of an organisation’s Real Estate and Facilities Management functions.
■ As a tool for communicating management requirements to suppliers of outsourced contracts.
■ As a yardstick against which to measure the organisational capabilities that deliver an organisation’s workplace.
■ As a framework within which to develop management competences.
■ As a framework that enables the unification of goals and objectives of CRE, FM, HR, IT, Risk and Security functions.
■ As a framework within which to develop supply organisations’ capabilities.
4 THE BENEFITS OF AN INDUSTRY ACCEPTED FRAMEWORK

The following benefits will be provided by the adoption of an accepted Framework:

- The conscious and demonstrable alignment of the day to day delivery of workplace experiences to the core purpose of the organisation.
- The ability to clearly communicate management requirements needed to deliver effective outcomes on a robust and continuous basis.
- The ability to demonstrate the effectiveness of the organisation(s) responsible for managing the workplace against an accepted framework and consequently, improve the strength of management capabilities.
- The ability to develop organisational and personal competences against an accepted framework.
- The enhanced professional standing of the Real Estate and Facilities Management organisation as seen by core business leaders.
5 USING THE FRAMEWORK TO TRANSITION TO ‘WORKPLACE MANAGEMENT’

As well as assisting organisations in building their organisational capabilities to achieve best practice in the management of their workplace, the Framework can also be used to enable a transition to a ‘Workplace Management’ model for ‘hi touch’ workplaces in which supporting the organisation’s people to deliver their best contribution in an economical fashion, becomes the primary focus.

Workplace Management

This is how we define Workplace Management:

‘Workplace Management is the management of all resources needed to design & maintain appropriate, effective and economical workplace experiences that align to strategic business objectives and support people in doing their best work every day, wherever they are.’

Organisations are ultimately the aggregate energy of large numbers of people harnessed together within structures and processes to deliver a defined outcome. Maximising the contribution of people in this endeavour is an increasingly important challenge for senior leaders in public and private organisations.

It follows that the primary role of all those involved in the delivery of services, technology and environments is to enable people to deliver their best contribution to their organisations every day, inspired by their experience, supported in their work endeavours and unencumbered by failures in services or systems.

Today’s Facilities Management discipline embraces the management of a disparate set of operational services that individually support an organisation’s buildings. Often the people involved in the delivery of these services do not recognise the linkage between their endeavours and the emphasis of management is on procurement, cost and delivery against discrete Service Level Agreements.

But as organisations place a higher premium on maximising the contribution of their people resources, and as we recognise that the place of professional work is no longer exclusively the office (i.e. people are working at home, in services lounges, coffee shops, partner offices, at airports and on trains) so the approach in supporting people must become more sophisticated and integrated, delivering carefully thought through
workplace ‘experiences’ in which the contribution of many players is harmonised to deliver a greater outcome.

Consequently, to maximise the contribution an organisation’s people deliver to their organisations, those managing the workplace need to start thinking about joined up ‘workplace experiences’ as opposed to disparate services. By considering the brand values, marketing image, functional needs and demographics it is possible to determine the requirements the workplace experience must meet in best supporting the organisation’s strategic purpose.

The ‘design’ of the experience is achieved through collaboration with Marketing, sustainability, IT, HR, risk management, security, business continuity and external service providers. The scope of Workplace Management embraces the ‘workplace experience’ that would be appropriate in all the places people work (inside and outside office buildings) and embraces not only the practical issues associated with effective work, but also the emotional and sensory aspects. Workplace Managers need to think like leaders from the entertainment industry and design workplace experiences in the same way they would design a theme park or theatrical experience.

Once an ‘experience’ has been defined and designed, an ‘experience centric’ set of Service Level Agreements and measurements need to be developed to ensure the ‘experience’ is delivered robustly every day and effectively monitored. But none of this can be achieved without considering the economics of delivering the ‘experience’ and so consideration of the cost and the utilisation of assets and services must be included in the mix too. Also, linked to economic delivery we must consider business volatility as a strategic consideration, ensuring that the workplace portfolio is capable of changing with the lowest cost and levels of disruption to respond to (even unlikely) business change. The confluence of these ideas, we define as ‘Workplace Management’ and the Framework helps to bring these elements together.
6 COMPONENTS OF THE FRAMEWORK

The Framework consists of 10 management capabilities and provides a vehicle for determining how well the organisation achieves best practice in the management of its workplace.

STRATEGIC MANAGEMENT

This capability is concerned with the innovative alignment of the workplace 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. Its key question is constantly ‘how can we continually enable our organisation to achieve its strategic purpose in the most effective manner?’

The principle outcomes of this capability:

- The effective alignment between the organisation’s core purpose, business strategy, drivers and external environment with the acquisition, design and day to day delivery of the workplace and services
The conscious development and articulation of ‘workplace experiences’ that are designed to align to the organisation’s culture and strategic objectives.

The effective strategic management of supply and demand of the workplace to enable the business’s purpose to be achieved in the most economical fashion.

To determine the strategic business demand for the workplace services that supports the business strategies.

Securing the required investment.

The provision of resources (people, space, services, technologies and information) to enable the organisation to achieve its strategic purpose along with plans to exit/transition.

The creation of an atmosphere and supporting processes that foster continual improvement and innovation in all aspects of the workplace provision.

The recognition of those responsible for the workplace as professional contributors to the strategic success of the organisation.

The development of the function against the Framework.

**CLIENT RELATIONSHIP MANAGEMENT**

This capability is concerned with the development and maintenance of effective relationships with internal clients and consumers to gain an intimate knowledge of future plans, demand for the workplace and the proactive evolution of the workplace experience to deliver greater value at an economic cost.

The principle outcomes of this capability:

- To foster trusting and effective relationships with internal clients and consumers.
- To gain an intimate understanding of business units and their likely demand for the workplace.
- To pre-empt business changes and plan for their consequences.
- To develop a knowledge base for each consumer group to enable proactive proposals for changes in workplace options and arrangements to be made.
- To determine business requirements for services that are immediate or short term in nature.

**PERFORMANCE MANAGEMENT**

This capability is concerned with defining and measuring the performance needed from all parts of the Framework to enable the delivery of effective workplaces at an economical cost. It is also associated with setting up processes and mechanisms to ensure improvements in service.
The objective of this capability:

- The development and administration of performance measurements that are practical, meaningful and outcome based to manage all aspects of workplace effectiveness and in ‘high touch’ environments, the ‘workplace experience’.
- The ability to be able to interpret these results in order to take corrective actions in the short term and improvements in the medium term.
- To share knowledge across the organisation and supply chain through feedback of performance and practices that enable continuous improvement in services and strategically in the workplace design.

SUPPLY CHAIN MANAGEMENT

This capability relates to best practices in the selection of suppliers, the governance of supply chain relationships, the management of contracts and the performance management of supplied services.

The objectives are:

- The development of open and honest relationships with all suppliers of services.
- The alignment of services with the requirements of the business.
- The encouragement of rapid responses to change and innovation in supply.

CAPACITY MANAGEMENT

This capability is concerned with the provision of appropriate levels of capacity and commitments to the physical workplace, services and technologies needed to achieve the organisation’s strategic purpose in the most economical manner.

The aim of this capability is:

- To maintain a precise understanding of the true capacity of the workplace, services and technologies to support the business along with the constraints and factors that influence that capacity.
- To continually measure the level of consumption of the capacity.
- Through the development of a process, use knowledge of consumption of capacity to improve the effectiveness and resilience of services and the workplace.
- To maintain an appropriate balance of the workplace ‘supply’ in relations to short and long terms business needs and the levels of volatility of the business.
- To enable effective decisions about commitments to future workplace capacity to be informed by an understanding of existing potential capacity taking into account innovation in ways of working and space use.
RESOURCE MANAGEMENT
This capability is concerned with day to day management of resources needed to deliver effective workplaces. Resource Management covers physical assets but also the human resources and utilities that are consumed. The aim of this capability:

- To ensure that that the organisation responsible for managing the workplace has the right number of suitably trained and motivated people to deliver the workplace and services.
- To ensure that the best in class management techniques are deployed to ensure that people within organisations responsible for the workplace are inspired to deliver excellence in customer service.
- To form decisions based on evidence of actual consumption of services, space, systems, services and other resources.
- To enable short term changes in demand to be balanced against available capacity in the most cost and productive manner.
- To enable the efficient use of the workplace to deliver on sustainability requirements.

IMPROVEMENT MANAGEMENT
This capability is concerned with improving the provision of services and environments through a culture of innovation, informed by the knowledge of the effectiveness of day to day services. It involves processes to capture, monitor and fix day to day failures in service and proactively and systematically engage all people responsible of delivery of the workplace in seeking ways to improve the value of the workplace.

The aim of this capability is:

- To ensure failures in workplace environments and services and the ‘workplace experience’ are dealt with swiftly and economically.
- To create processes that proactively and systematically engage all people involved in the delivery of services to capture, develop and implement innovations in the provision and delivery of the workplace.
- To make sure that lessons are learned and remedial actions taken to eliminate the root causes of failure.
- To ensure that learning’s are captured and lessons used in subsequent design, specification, training or delivery of the workplace.

RISK MANAGEMENT
This capability is concerned with the best practices in assessing and managing risk, business continuity planning, workplace security, workplace health & safety and environment management. The aim of this capability:

- To assess the risk of operational failure in relation to the strategic success of the business and to agree the appetite for risk.
- Reduce the likelihood of security incidents, failures in projects, services and the workplace.
- Reduce the impact of any of these aspects upon the business, its reputation and its people.

**CHANGE MANAGEMENT**

This capability is concerned with best practices in promoting, managing, and supporting changes in the way in which the workplaces are used and managed. The aim of this capability:

- To formulate strategies and processes needed to make effective changes to locations, space, technologies, systems, processes, behaviours or services to improve the effectiveness of the business.
- To manage technically, behaviourally and politically complex change programmes.
- To put in place arrangements that will ensure the changes implemented are maintained and evolve.

**PROJECT MANAGEMENT**

This capability covers best practices and development of skills and processes that deal with the management of projects from ‘inception’ to ‘business as usual’. It includes justification, governance, financial management, change management, implementation, completion, and post project review.

The aim of this capability:

- To ensure processes and tools are in place to ensure the effective capture of programme needs and requirements,
- To ensure the appropriate processes, data flows and resources are in place to enable effective delivery of projects.
- To ensure suitably skilled resources are maintained to ensure the effective management of projects.

Each of the following chapters expands on the capabilities defined in this section along with what we believe represents the best practices known at this time.
STRATEGIC MANAGEMENT

Definition for this Framework
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 is to align these assets and service management strategies with those of the main business. Its principle purpose is 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.

Best Practice

- A documented and published Workplace Mission or Vision Statement that has been developed and agreed in conjunction with the Executive and made public to the organisation as a whole.
- A Workplace strategy covering present and future needs and expectations from all stakeholders including suppliers and internal customers.
- A Workplace Strategy based upon the ‘experience’ design along with headcount demand projections, knowledge of supply, business outlook and future trends in working is produced and presented to Executive Management at regular intervals.
- 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.
- 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.
- Service performance measurement to encapsulate users’ total experience of their working surroundings.

Outputs

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

Delivery
- Strategic plans supporting the Workplace Strategy are produced and acted upon.
- Service Level Agreements for all the services provided to business clients
- Performance of workplaces and services meet the requirements of the business
- Quality of service shows positive trends
- Professional development plans are agreed with internal staff and completed.

Other 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

Tim Hansen Intel 2012
RICS Nov 2012
RICS
BIFM People Management SIG Nov 2013
7.1 Strategic alignment

In general, the greatest challenge that leaders with responsibility for the workplace face, is gaining access to business leaders and encouraging them to share their thinking on the strategies for their areas of the organisation. The uncertainty of what the future holds, coupled with the commercial sensitivity, means that useful information seldom emerges from the boardroom. That said, many business leaders would not recognise the strategic nature of those with responsibility for managing the workplace and could be forgiven for excluding them from the inner circle of trusted internal advisers.

So to be successful, leaders responsible for the workplace need to actively work to be, (and be seen to be), credible, confident business contributors, knowledgeable about the organisation at large, the wider strategy for the business, with the most up to date trends in people management, technology, engineering, service management and innovation. They must be able to make the links between all these factors to the benefit of the business almost to the point of being able to pre-empt changes in the business and ensure that workplace capacity and commitments are flexible enough to cope with a variety of upside and downside changes.

Best practices include:

- Become knowledgeable as a business leader by undertaking secondments to parts of the business to learn what really happens, do regular background industry reading, read business journals and newspapers. Be a businessman first and workplace leader second.
- Working with Marketing, HR and business leaders to design and develop workplace ‘experiences’ that align to the organisation’s strategic objectives.
- Development of a Workplace Strategy which includes the acquisition and disposal of Property that recognises a variety of business assumptions and scenarios and enables the organisation to inflate or deflate without cost or disruption.
- Publish, communicate, promote and seek buy-in to the strategy and demonstrate how it contributes value to the business.
- Seek ways to get to know senior business leaders. These can be associated with business or extra work activities. Being accepted as a business leader is predominantly not a knowledge or technical issue it is an interpersonal issue.

7.2 Innovation

To continually increase the value of the organisation responsible for delivering the workplace to the wider enterprise, it is important (as with any function within any business) to create and maintain an environment in which innovation is fostered and delivered along with processes for its proactive stimulation. Innovation is primarily
about releasing every person within the functions responsible for workplace to think creatively and come forward with new ways of delivering more value to the enterprise in relation to its businesses strategy and needs. This may, for instance, be in creating better experiences for people to assist in recruitment or retention, doing things more efficiently and cost effectively, finding better ways to use space etc.

In order to deliver innovation leaders involved in delivering the workplace need, through their words, behaviours and actions to:

- **Inspire Curiosity** – encourage employees to expand their understanding of both internal and external stakeholders: who they are, how they are interdependent, and the unique contexts in which each one operates.
- **Challenge Current Perspectives** – help employees view problems and opportunities differently and envision alternative possibilities.
- **Create Freedom** – empower experimentation, risk taking, learning from mistakes, and valuing effort over perfection.
- **Drive Discipline** – help employees identify execution implications early and often and align efforts to ensure successful implementation of innovative solutions.
- **Create time and processes** - develop processes to capture innovative ideas and give people time and techniques to think laterally about innovative improvements.
- **Develop partnerships** with suppliers that encourage innovation through removing contractual obstacles and developing supportive governance processes.

### 7.3 Agile Working/Agile Workspace

The availability of mobile technologies has enabled a major shift in working patterns. People can choose to work in ways that best match their jobs and personal circumstances. It may involve home working or various forms of contractual working arrangements. Particularly in ‘high touch’ work environments, the application of Agile Working may bring both asset and professional productivity improvements.

Best practices include:

- Piloting Agile Working in order to learn about the solutions and processes associated with successful implementation as well as providing a measurable visual manifestation of the concepts.
- The conscious consideration of forthcoming lease breaks as opportunities to rationalise accommodation through potential adoption of agile working.
- The development of an Agile Working steering group and implementation group involving all stakeholders associated with bringing about a transition in workplace, technology, process and behaviours.
- The development of Agile Working policies.
- The development of tools and processes to determine the most appropriate Agile approaches and solutions.
- Close working with HR to create policies that cover the requirements of Agile Working, remote workers and an effective agile employee proposition.
- Developing with HR, methodologies for assessing the suitability of roles and people for remote working.
- Developing close relationships with IT to develop an infrastructure that supports effective individual and team working anywhere.

### 7.4 Scenario Planning

Because of the long term nature of financial commitments to the workplace either through leaseholds or freeholds and the inherently inflexible nature of buildings, it is important to recognise that whatever the business conditions and requirements are at the time of building acquisition, they will not remain the same for long. Whilst in many cases senior business leaders may not be comfortable with discussing upside and (particularly) downside business scenarios in planning the workplace portfolio, leaders responsible for the workplace need to consider a variety of potential scenarios. These scenarios may include increases or reductions in headcount, the impact that technology may have on the aspects of the business that drive space requirements, changes in organisational structure and even the withdrawal from certain locations.

Scenario planning is an important tool in the planning the future workplace. Whilst it may not be possible to accurately forecast the future, it is definitely the case that from a workplace perspective as much as possible needs to be done to prepare for a variety of futures. The linkage of this aspect and the Capacity Management capability (described later) is vital so that planning is based upon a true understanding of latent capacity in the existing estate and the available capacity and its capabilities. This will enable more sophisticated decisions to be made about the need for further commitments to inherently inflexible buildings and services.
7.5 Financial Management

Understanding budgets and managing departmental costs are skills that are shared with many management functions but the use of financial tools in supporting change and underpinning strategy is particularly critical for leaders managing the workplace in order to effectively compete for corporate funding. Many difficulties exist in the way in which lines for cost are set in departmental accounts which make it complex to compare costs on a transaction basis. Benchmarking requires that the costs of each service can be separated by location and department. To analyse costs and to be able to create cost models at this level of detail needs skills of financial analysis over and above normal accounting practice.

Best Practices include:

- Comparing costs of workplace services through benchmarking, internally and externally, to ensure a best in class cost and service level.
- Identifying the lifetime costs of workplace assets to develop appropriate maintenance regimes which contribute to design trade off decisions in the early stages of providing new Facilities.
- Seeking to get agreement to a chargeback system to allocate costs fairly and motivate leaders to make best use of the organisation’s workplace assets.
- Ensuring that Financial Management and analysis skills are a distinct part of the skills inventory for leaders managing the workplace.
7.6 Designing the Workplace Experience

Where the organisation is at the ‘High touch’ end of the workplace spectrum described earlier, in which the workplace’s purpose is to proactively support the organisation’s people in achieving their best contribution every day, careful consideration needs to be given to the design of the ‘workplace experience’ constructed from all the interlocking services that are provided.

‘To design an experience you need to think through, second by second, the fusion of sounds, sights, information, web pages, smells, spaces, images, interactions, human behaviours and processes to create an experience that is both effective, energising and which subtly reinforces brand values’.

Ref: The Kinetic Organisation

The ‘Experience Tunnel’

The idea of an ‘Experience Tunnel’ represents the individual’s perceptions of his environment minute by minute through a working day in relation to all of their senses. Through this approach, we can define the feelings and experiences we would wish people to have throughout their working day and construct a ‘workplace experience’ which delivers these experiences.

For example, on arrival at a building our sense of the organisation will be governed by the type of materials and colours used, the sounds, smells, behaviours, processes we experience.

These experiences can be reflected in Service Level (Experience Level) Agreements which cover the effectiveness of the integration of spaces, services, technologies, processes and behaviours often delivered by different internal departments and external suppliers.
SLA’s help each service provider to know what is expected and how the outcomes will be measured, to derive accurate prices. Incorporating ‘Experience’ requirements into SLA’s and subsequently managing expectations, requires close working with internal clients and with suppliers to result in cost effective, achievable and satisfactory expected service outcomes.

The growing interest in Agile Working practices opens up changes in the type and nature of services that prior experience may not necessarily provide. It is, therefore, essential that the process of determining new SLA’s is done collaboratively involving internal core clients, user groups and suppliers and that they are reviewed regularly to capture points of learning that emerge. Often SLA’s contain penalties and incentives which can result in a lack of attention to managing service performance. In times of change, however, active management and collaboration on services is a necessity. The SLA should be what the acronym says - an ‘Agreement’ not an unyielding statement.

7.7 Design for change and serviceability
The workplace and services represent some of an organisation’s longest term commitments. Whilst the design of a facility or a service may take several months, the operation of the facility is likely to take place over many years. Whilst the initial investment in design and delivery of the workplace is significant, the life time running costs of a facility usually dwarf the up-front costs. So it is important that the serviceability of the facility is at the forefront of the design teams thinking during the design process.

Further, during the life of a facility, many facets of the organisation and the way it works will change, driven by economic need. Changes in its market, changes in technology, processes and new cultural norms need to be recognised. It is vital that in the process of designing a facility and supporting services, that recognition of these factors is considered within the design.

Consequently, it is vitally important that the workplace, services and technologies are designed for effective operation, servicing and change. To this end all processes and activities associated with the design of new services, technologies and the workplace should involve life cycle costing and an active contribution from workplace leaders with knowledge and responsibility for the day to day operation of the workplace.

7.8 Developing new skills
It is clear that the role of leaders responsible for the workplace is changing significantly and will continue to do so as our world of work changes. New skills will be required for those who act as the link between supply delivery and internal clients. Change will require new skills of consultancy and the ability to design experiences and help users transition their workplace behaviour. The on-going development of people and organisational competences is critical to the continual enhancement of value from the organisation responsible for the workplace.
Best Practices may include:

- The development of effective leadership skills needed to manage a service organisation covering items within this Framework.
- The creation of a competency framework for staff involved in managing the workplace that links to the strategic purpose of the organisation to the skills and capabilities needed to deliver the workplace and services needed by the organisation.
- The creation of succession plans for the key members of leaders and teams managing the workplace.
- The creation of continuous professional development programmes to ensure people understand how the world of the workplace is changing and to develop their knowledge base and experience across the broad dimension of workplace management.
- The creation of a Recognition Scheme which recognises personal staff contributions to Quality and Service.
- The encouragement of professional development of staff and those of suppliers by becoming accredited with professional bodies associated with the management of the workplace.
# 8 CLIENT RELATIONSHIP MANAGEMENT

## Definition for this Framework
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 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.

## Best Practice
- 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.
- Service Level Agreements for individual user departments take into account differing requirements wherever possible.
- Regular surveys carried out on all services used by occupants to the workplaces in order to gauge perceptions and satisfaction.
- A communication plan for promulgating plans, successes and initiatives to the wider company/organisation’s workforce.
- Performance of services and quality Improvement plans are reviewed regularly with client groups.
- Post occupancy reviews are held at the end of major move or change projects.

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

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

## Other sources
Client Relationship Management recognises two parties and must interface with both effectively to achieve success. The first are the ‘clients’, the senior leaders whose businesses pay for services and space (directly or indirectly). The second party are the ‘consumers’ who are the people who use the services, environments and experiences each day.

Leaders responsible for the workplace hold a key role in bridging the needs of the business units and the service providers. In times of change this role consists of building close working relationships, interpreting needs, challenging wants, designing solutions and planning implementations. It requires knowledge of the business units’ objectives, its people and their working practices. It goes well beyond the communication of change involved in responding to requirements for internal desk moves and problem resolution. These are, of course, important but the role should encompass more of a consultancy approach acting as advisor to the business on design and services which can improve business performance. This will require the Client Relationship Manager to have a good understanding of the nature of the work being done and the skill/experience to see how workplace changes can impact peoples’ productivity.

The interpretation of business needs and development of immediate and short term demands for workplaces and services represent an important role for the Client Relationship Manager. The role encompasses day to day interaction with internal business clients and with those responsible for delivery of services. Often this role is viewed by the service providers as the “intelligent client”.

---

**STRATEGIC MANAGEMENT**

What **long term strategic goals** of the business do CRE/FM critically support?

**Strategic 1-5 year demands** for CRE/FM services

---

**CLIENT RELATIONSHIP MANAGEMENT**

What **short term tactical objectives** of the business lines do CRE/FM critically support?

**Tactical 0-1 year demands** for CRE/FM services

---

**PERFORMANCE MANAGEMENT**

Supply management | Innovation management | Risk management | Change management | Project management
Best Practices include:

- The appointment of Client Relationship Managers that have the necessary authority and skills to build excellent relationships and who can make decisions on the basis of their understanding of their clients’ needs.
- The active development of Client Relationship Plans for all major departments and geographies which take into account the special needs of those units.
- Client Relationship Managers becoming "agenda setters" who proactively engage their clients with new ideas, points of view, and value-added suggestions.
- The development of practices that encourage leaders responsible for the workplace to engage with the business through assignments, secondments and career development.
- The implementation of active processes designed to collect data on the satisfaction of 'workplace experiences' which are used to drive changes.
- The training of workplace leaders in the latest standards of Client Relationship practices.
9 PERFORMANCE MANAGEMENT

PERFORMANCE MANAGEMENT

**Definition for this Framework**
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 measures are often misinterpreted and the wrong things are measured against poorly defined objectives and outcomes leading to wasted time and effort.

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

**Outputs**

<table>
<thead>
<tr>
<th>Strategic</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overarching KPIs linked to business objectives, vision and values</td>
<td>Suite of KPIs which are measurable and meaningful with clear targets/thresholds</td>
</tr>
<tr>
<td>Process to adjust the balance of ‘importance’ for elements of the performance management system to focus on certain areas</td>
<td>Clear Reporting which is easily interrogated and tailored to the customer</td>
</tr>
<tr>
<td>Each measurement has an owner</td>
<td>Dashboard alert systems</td>
</tr>
<tr>
<td>Outcome based SLAs</td>
<td>Quality Improvement Process</td>
</tr>
<tr>
<td>Benchmarking</td>
<td>Use of simple statistics to identify true changes from random variations.</td>
</tr>
<tr>
<td>Trend Analysis</td>
<td>Engage suppliers and clients in performance reviews</td>
</tr>
<tr>
<td>Customer Satisfaction and Customer Needs Analysis</td>
<td>Everyone values measures as useful feedback to help them do their jobs better and contribute to the organisation’s vision</td>
</tr>
</tbody>
</table>

**Other Sources**
- PuMP Performance Management: Stacey Barr, www.staceybarr.com
- Show Me the Numbers: Stephen Few 2004
- Information Dashboard Design: Stephen Few 2006
- KPI Register for The workplace Management BIFM & ARK: www.arkeman.co.uk/bifm/index.htm
- BS EN 15221-7 Guidelines for Performance Benchmarking in The workplace Management
Performance Management is the lynch pin of all the management capabilities and as such enables the measurement the effectiveness of all other management capabilities and their operational outcomes.

However, it is not as simple a discipline as it may first appear. Poor alignment of measures to the goals of the business can result in the focus being skewed to the wrong things leading to damaging decisions and wasted effort. The use of poorly defined measures that are open to misinterpretation is common and often leads to dispute.

The most important part of Performance Management is in the use of data to enable the engagement of all parties (the business, suppliers, staff, occupants and customers) in innovating to achieve desired outcomes. This includes the communication of performance measures and their results which become a major tool to aligning all stake-holders interests.

9.1 KPIs
In many cases measures of performance are already in existence within FM. Service Level Agreements, KPIs, Performance Indices are all used to monitor service delivery, compliance with contract conditions and business policies.
Best Practices include:
- KPIs are aligned as closely as possible to the businesses’ strategic goals.
- Measurements that are predictive of future performance are included in addition to those backward looking ones focused on past performance.
- The provision of performance measures chosen on the basis of measuring desired outcomes as opposed to being chosen on the basis of ease of accessing data.
- The balance of service and “experience” performance with financial performance.
- Measurements that are carefully defined and where ownership is clearly assigned.
- The development of Quality Improvement Plans created from careful analysis of data within which leaders seek to correct failures to meet desired performance levels.
- The development of analytical skills to interpret statistically significant performance results and link to causal factors.

9.2 Quality Improvement
It is a key responsibility of workplace leaders to improve the quality of the services for which they are responsible. Quality, in this context, is meeting the requirements of the business and not as some form of star rating. It is a learning process which relies upon management commitment and support. In that sense, it encourages openness in
acknowledging problems and failures, analysing root causes and working to eliminate those causes.

The following diagram illustrates the inter-relationship of Quality Improvement to the resolution of problems and performance management of service suppliers.

Best practices include:

- The use of processes which engage the internal team responsible for delivering the workplace and its key suppliers in Quality Improvement initiatives and starts with the strategic goals of the organisation mapping them to KPI’s.
- The development of a programme of initiatives that remove ambiguity, identify measurable results and link and cascade strategy through the supply chain and organisation.
- The active use of performance measurement to formulate improvement plans.
- The engagement of staff and suppliers in identifying root causes of problems and resolving them.
- The development of measures to demonstrate improvement from actions taken.
10 SUPPLY CHAIN MANAGEMENT

### SUPPLY CHAIN MANAGEMENT

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

#### Outputs

<table>
<thead>
<tr>
<th>Strategic</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supply chain Strategy</td>
<td>Open book accounting for costs of services</td>
</tr>
<tr>
<td>Procurement standards and policies</td>
<td>Balanced Scorecard performance reviews carried out monthly</td>
</tr>
<tr>
<td>Collaborative contracts that have exit plans</td>
<td>Trends in performance are reviewed and Quality Improvement Plans jointly owned.</td>
</tr>
<tr>
<td>Sharing of knowledge and business information across the supply chain</td>
<td>Communication across the supply chain is actively encouraged and supported by appropriate activities that support social cohesion.</td>
</tr>
<tr>
<td>Relationships across the supply chain are overseen by a Governing management group of principal stake holders.</td>
<td></td>
</tr>
<tr>
<td>Contracts reviewed annually with respect to their continued alignment with business needs.</td>
<td></td>
</tr>
<tr>
<td>The benefits from Innovation are shared.</td>
<td></td>
</tr>
</tbody>
</table>

#### Other useful sources
- The Facilities Management Professional Standards Framework
- BIFM February 2014
- ISO 11000 Collaboration Standard 2010
- BS EN 15221-2 Guidance on how to prepare facility management agreements
The aim is to create arrangements which align supplier activities within the supply chain to the organisation’s objectives and (in high touch environments) ‘workplace experiences’, recognising the volatility of the organisation’s business situation and the probability of the need for change in volume or nature of services. This requires the development of open, mature and honest relationships with all suppliers of services to achieve that alignment, facilitate innovation and ensure the avoidance of a ‘silo’ mentality.

The rapidly changing business environment requires that suppliers are positively responsive to change and best practices should encourage agility to change and innovation in supply.

Supply Chain Management seeks to eliminate the adverse trends that often characterise adversarial supply relationships as illustrated in the figure below.

Best practices may include:

- Establishing a governing Supply Chain Council whose purpose is to give direction and help align Supply Chain strategy with the company's overall strategy. The workplace leaders should be a major influence on this Council.
- Developing appropriate styles of relationship with suppliers dependent upon the nature of the service and the criticality to the organisation. In some cases, developing collaborative relationships through strategic partnering arrangements.
- Selecting IT systems that enable effective management of the supply chain through careful determination of needs and an effective selection process.
- Engaging in collaborative strategic sourcing, this is the cornerstone of successful supply chain management.
- Measures and a culture that focus on total cost of ownership (TCO), not price.
10.1 Cost management

One of the most common reasons for outsourcing a service is to achieve cost savings and it is important therefore that cost management is well-developed.

Best practices include:

- True transparency of supplier accounts and accurate identification of the management and corporate overheads that are being charged.
- Ensuring supplier discounts are passed through to the client organisation.
- Requiring that supplier accounts are open to independent audit from time to time.
- Require that costs are reported not only in relation to budget but also in relation to transaction or work carried out.
- Ensuring that payment systems are well integrated with Work Order and Contract systems.
- Ensuring that suppliers are paid on time and are rewarded for innovation.

10.2 Contract Form

The process of renewing or renegotiating an outsourcing contract can be a great lesson in what can go wrong in an outsourcing relationship. A common theme is the informality that can grow in long-standing sourcing contracts. This should not be confused with partnership. Contracts that have been in place seven to ten years often lapse into an informal relationship that has the provider acting more like an internal Facilities Management department than an outsourced provider in a buyer/seller outsourcing partnership relationship.

Best practices include:

- Supporting a supplier partnership by putting in place a high level governance structure involving both client and supplier.
- Seeking through contract conditions to encourage supplier innovation where outcomes are clearly linked to business benefit.
- Ensuring contracts protect intellectual property rights.
- Ensuring that contracts include an exit plan in the event the contract is terminated.
- Ensuring that all performance data that relate to the workplace belongs to the client organisation and is made available when the contract finishes.

10.3 Selection of Suppliers

Given the effort and costs incurred in going through the selection and mobilisation of a new supplier, it is important that the selection process is done thoroughly and employs best practices. It is essential that before starting a process of market testing there is a clear understanding of how the outcome of this process will support the strategic goals
of the business. A clear understanding of this will also clarify what the selection criteria should be and who should be involved in the selection process.

An example of a selection process that is based upon a concept of a value chain which sets out an end-to-end process to be followed to ensure maximum value is achieved from the outsourcing process and risk is appropriately managed has been used by some procurement functions and is illustrated below:

### Outsourcing Process Value Chain

![Outsourcing Process Value Chain Diagram]

Note: TOM Target Operating Model

Best practices include:

- The provision of up-to-date strategic plans for the supply of services to the workplace.
- The implementation of a formal supplier selection process.
- Clearly defined selection criteria for suppliers based on those agreed by stakeholders.
- An assessment of the cultural fit of a supplier with the client organisation and the ‘workplace experience’ the client organisation is seeking to achieve is a part of supplier selection.
- The inclusion of steps for prequalification and visits to reference sites.
11 CAPACITY MANAGEMENT

CAPACITY MANAGEMENT

Definition for this Framework
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.

Best Practice
- Creation and maintenance of databases of capacity data of all physical assets.
- Maintain Records of all constraints of physical assets e.g. floor loadings, maximum power supply, HVAC, Health & Safety, etc.
- Use of computer models that estimate the changes in demand for services and assets resulting from changes in the business.
- Create strategies for acquisition and disposal of physical assets and for the management of redundant assets or vacant space.
- Systems exist that integrate the data of CAFM with data from BIM.
- Knowledge of utilisation of assets and services provided by Resource Management.

Outputs
- Accommodation Plans that support the businesses’ strategic plans
- Space standards
- Space charging
- Policies for management of vacant space
- Policies for acquisition and disposal of the workplace assets
- Models that illustrate the effect of flexible ways of working on use of assets
- Maintenance of records of capacity and constraints to capacity for all buildings.
- In conjunction with Resource Management meet the changing requirements of the organisation.
- Identifies potential shortfalls in capacity
- Identifies areas of over-supply.

Other useful sources
BS EN 15221-6 Area and Space Measurement in the workplace.

Capacity Management is primarily about understanding the true capacity of the workplace supply (assets and services) to support the business and the degree to which that supply is being consumed (demand) along with constraints associated with supply. Resource Management (defined in the next section) is concerned with the day to day management of the supply.
For workplace leaders, the most common example of balancing demand and supply is to provide solutions to the changing needs for physical accommodation. The reconciliation of demand and supply is at the heart of accommodation planning. Demand can arise from the implementation of strategic initiatives, determined through Strategic Management processes, or from tactical changes, identified through effective Client Relationship Management. The balancing of demand and supply during continual change represents a major challenge for workplace leaders. This can be alleviated through accommodation planning, based upon flexible forms of working, as well as improving the use of resources.

Best practices include:

- Having an effective process for maintaining up-to-date data on the capacity constraints on each floor of every building the organisation occupies to ensure that through changes there is a sound basis for making capacity decisions. These constraints may be floor loadings, maximum power supply, HVAC, Health & Safety issues etc.
- Constituting the Workplace Steering Group populated by leaders from the business, IT, HR, CRE and led by the workplace leader.
- Close working relationships between FM and CRE to ensure Real Estate strategy is aligned to the businesses’ demands for the workplace.
- Using systems, or other means, of measuring the actual use of space during the day, month and year to make decisions upon the allocation of space. This may include utilisation of desks, meeting rooms etc.
- Using systems to model the requirements for space from forecast future business requirements.
- Using agreed strategies for the acquisition and disposal of accommodation and for the management of vacant space. Such strategies need to be updated to regularly to align them with changing corporate business needs.
12 RESOURCE MANAGEMENT

<table>
<thead>
<tr>
<th>RESOURCE MANAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition for this Framework</strong></td>
</tr>
<tr>
<td>The day to day management of resources needed to deliver effective workplaces and services. It covers both physical assets, human resources and utilities</td>
</tr>
</tbody>
</table>

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

| **Outputs** |
| **Strategic** |
| - Models of utilisation for different ways of working |
| - Sustainability programmes |
| **Delivery** |
| - Utilisation data of all assets and services |
| - Trend analysis of utilities and services |
| - Space planning services that support moves and installs |

| **Other useful sources** |
| ISO 14001 Environmental Management Systems – Requirements |
| ISO 15392 Sustainability in building construction — General principles |

Resource Management is concerned with the use of all resources used in the provision of workplace services (space, energy, soft services such as catering etc.).

The following best practices provide evidence of the utilisation of physical the workplace and services so that:
1. Decisions are informed by evidence of actual use.

2. Changing patterns of demand and supply can be balanced in the most cost effective and productive way.

3. The requirements for sustainability are achieved.

Best practices include:

- Having processes in place to ensure that CAFM data on all classifications of space are up to date and take account of changes made through day to day moves and installs.

- Electronic monitoring the occupancy of desks, meeting spaces and social spaces to ensure they are not under or over occupied.

- Proactively managing the location and allocation of space to teams so as to achieve the best balance of supply and demand on a daily basis to ensure an effective experience for people is maintained.

- The provision of regular audits on need for storage.

- The maintenance of space standards and delivery processes which are reviewed in the light of changing business needs and working methods.

- The provision of management systems that are used to highlight trends in excessive energy use.

- Ensuring that the services of a Certified Energy Manager are used to ensure that opportunities for better use of energy are identified.

- Putting in place measurements of the utilisation of desks, meeting rooms and other workplace ‘objects’
## IMPROVEMENT MANAGEMENT

### Definition for this Framework

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

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

### Outputs

**Strategic**

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

**Delivery**

- Resolution of day to day problems.
- Regular detailed analysis of failures and problems
- Monitoring action against the Quality Improvement Plans

### Other useful 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
- EFQM Excellence Model - European Foundation for Quality Management
- 6 sigma

Most leaders with responsibility for managing the workplace would regard the resolution of day to day problems as the most fundamental of all their operational responsibilities and Help Desk systems are widely used as the means of effectively handling the process. Help Desk systems also should provide a rich resource in
understanding the quality of the services being delivered over time. The cumulative information collected, properly analysed, should lead to identifying root causes and form an integral part of Quality Improvement plans.

Active management of problems and failures in the workplace and their resolution should result in:

1. Workplace services and experiences that meet the requirements of all clients and users.
2. Failures being dealt with swiftly and economically.
3. Lessons being learned leading to the elimination of repetitions through a continuous improvement process.

Best practices include:

- Ensuring that the Help/Service Desk or Fault Reporting system covers all problems with every service provided by the organisation responsible for the management of the workplace.
- Requiring that systems track work requests through to completion.
- Providing consumers with the ability to follow the progress of a reported problem and consciously feedback it’s resolution.
- Requiring service provider(s) to regularly review all problem trends with the view to recommending corrective and improvement actions.
- Surveying users' views on the effectiveness of problem resolution process in leading to improvements.

13.1 Problem Workflow

These best practices are most appropriate for the internal team responsible for the workplace team and the supplier of the Help Desk/Service Desk/Fault Reporting system to consider.

Best practices include:

- A process for ensuring that the Help/Service Desk/Fault Reporting system checks for user satisfaction with the fault resolution prior to closing a problem.
- That the Help/Service Desk/Fault Reporting system accurately reflects office moves and changes to SLAs.
- Ensuring that Information from the Help/Service Desk/Fault Reporting system is used to validate invoices presented for work done and work tickets raised.
- The requirement that the Help/Service Desk/Fault Reporting system promptly escalates outstanding problems which fail SLAs.
- That historic data held by the Help/Service Desk/Fault Reporting system is archived and available to establish long term trends on the performance of the supply chain.
14 RISK MANAGEMENT

RISK MANAGEMENT

Definition for this Framework
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
The scope of risk management includes:
- Security of physical and information assets
- Health & Safety risks to people.
- Risks arising from change and projects
- Risks to the effectiveness of work arising from failure of delivery of services
- Environmental risk
- Business Continuity Planning

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

Outputs

Strategic
- Risk Management strategy and policies
- Security strategy based upon corporate risk.
- There are strategies that cover Health & Safety and protection of the Environment
- Expertise in risk assessment
- Continuous monitoring of major sources of risk
- Identification of key areas of business and their reliance upon the workplace assets and services.
- Alignment with IT risk management.
- Business Continuity Plans in working order

Delivery
- Systematic processes to identify and evaluate risks
- Projects are evaluated and authorised appropriately according to the level of risk.
- All major changes to working conditions are risk assessed and appropriate provisions made in Change Management plans
- An effective physical security service is provided to protect assets.
- Processes ensure that the health and safety of people at work are protected.
- Fire and evacuation drills are regularly done.
- Security services meet requirements

Other useful sources
OHSAS 18001 – Occupational Health & Safety Management Systems
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

Risk Management awareness and accountability is both increasing and becoming more complex in response to:

1. Awareness of the potential of terrorism to disrupt operations and lives.
2. Increasing sensitivity to threats related to large scale natural disasters.
3. Enhanced awareness of work related risks to health and the responsibilities everyone holds.
4. Situations where large numbers of workers and/or customers are congregated.
5. Our increasing reliance on data and information for business continuity purposes.
6. Increasing use of Agile Working and the implications that has on Risk Management.

14.1 Risk Assessment

The assessment of risk, business continuity planning, workplace security, workplace Health & Safety and Environment management is essential to:

- Reduce the likelihood of security incidents, failures in projects, services and workplaces and reducing any adverse impact upon the business.

Risk assessment is a decision-making resource. Analysis should be comprehensive and include: identification, probability, impact, exposure, mitigating actions, contingency plans, and triggers. Assessment should be initiated as an integral part of any change where significant risk factors have been identified, resulting in a formal status report.

There should be evidence that a systematic approach has been used to assess and manage risks.

Best practices include:

- Use of a formal process of Risk Identification, assessment and prioritisation which covers not only projects, but also changes in the business or external environment.
- Making all business stakeholders aware of the risks and are involved in assessing risk level and agreeing to how these risks are to be managed.

14.2 Business Continuity Planning

Business Continuity Planning (BCP) provides plans for continuity of business in the event of disasters or pandemics.

Best practices include:
- A regular review of business priorities and the implications for the management of the workplace.
- The provision of processes that regularly update understanding of where business value is created and how it is supported by the management of the workplace.
- The identification of workplace management processes that are critical to the organisation, including the IT requirements to maintain the service.
- The identification of those risks to business processes which are dependent upon the effectiveness of the workplace.
- Determination of the organisation required in the recovery of normal services.
- The development of a Response Plan that will be needed to deliver the recovery of the service.
- The regular testing of the Response Plans following major changes in service providers.

**14.3 Security**

Security provides protection for workplace resources from accidental or deliberate violation. It does not include IT security which is the responsibility of the IT organisation.

Best practices include:

- The development of a Security Strategy, based upon a Corporate Risk assessment.
- That the Risk Assessment should include the implications of any agile working arrangements involving access to multiple buildings.
- Using a systematic approach to evaluate risks, vulnerabilities and threats which can relate to Security Strategy.
- That Senior Executive Management endorsement to this Strategy as this is a key issue of business interest.

**14.4 Health, Safety & Environment**

HS&E provides Health and Safety for people in the working environment and manages those services that impact upon the wider environment. The wellbeing of people at work has wider implications to corporate competitiveness. HR departments are taking a serious interest in the effect of absenteeism, unplanned staff turnover and “presenteeism” on corporate performance. Working with HR department’s managers responsible for the workplace can seek to demonstrate the effect of working environment on these factors.

In addition, the Sustainability agenda helps workplace management professionals bring environmental and financial impacts into balance. The management of energy, water usage and projects such as low energy retrofits is all part of ‘Going green’.
Best practices include:

- Ensuring that there are formal HS&E policies and procedures.
- Ensuring that HS&E policies are linked into the Business Corporate HS&E Strategy.
- Ensuring that company audits are carried out against standards for HS&E.
- Effective collaboration with HR Departments to understand the impact of working environments on staff productivity.
- Ensuring that there are effective Performance and Reporting requirements for HS&E in place.
- The regular briefing of FM staff on latest legislation e.g. Carbon Reduction, BREEAM, LEED, the display of Energy Certificates, IEE Wiring Regulations. etc.
- The organisation champions a corporate Environmental Management System to achieve ISO 14001/EMAS/BS8555 compliance.
15 CHANGE MANAGEMENT

<table>
<thead>
<tr>
<th>CHANGE MANAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition for this Framework</strong></td>
</tr>
<tr>
<td>The promotion, management and support of changes in the way in which the workplace and services are used and managed.</td>
</tr>
<tr>
<td><strong>Summary</strong></td>
</tr>
<tr>
<td>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.</td>
</tr>
<tr>
<td><strong>Best Practice</strong></td>
</tr>
<tr>
<td>§ Formulation of strategies and processes that support effective changes to locations, space, technologies, systems, processes, behaviours and services</td>
</tr>
<tr>
<td>§ Active management of politically complex change programmes</td>
</tr>
<tr>
<td>§ Policies and processes that cover routine moves and installs integrated with those of IT</td>
</tr>
<tr>
<td>§ Processes which ensure continuity of services on changes to suppliers</td>
</tr>
<tr>
<td>§ All significant changes and projects are systematically risk assessed for impact on FM</td>
</tr>
<tr>
<td>§ Proactive support and encouragement for change resulting from flexible forms of working</td>
</tr>
<tr>
<td><strong>Outputs</strong></td>
</tr>
<tr>
<td>Strategic</td>
</tr>
<tr>
<td>§ Appropriate Change Management policies and procedures</td>
</tr>
<tr>
<td>§ Training in managing complex change</td>
</tr>
<tr>
<td>§ Oversight of major projects</td>
</tr>
<tr>
<td>§ Championing opportunities for flexible working</td>
</tr>
<tr>
<td>Delivery</td>
</tr>
<tr>
<td>§ Routine moves and installs are planned and managed</td>
</tr>
<tr>
<td>§ Changes are regularly reviewed with IT</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other useful sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prosci 3 Phase Change Management process</td>
</tr>
<tr>
<td>Change Management – The People Side of Change 2nd edition</td>
</tr>
</tbody>
</table>

Change has been a major theme in this document and Change Management capability is highly important. Change Management covers the promotion, management, and support of all changes in the way the workplace are used along with the behavioural and process changes that are involved in Agile Working. The objectives of this capability are to:
• Make a lasting transition to new working practices, leadership techniques and behaviours through a carefully considered programme of activities designed to explain the Agile Working concepts and the benefits that can be derived from them.

• Implement all necessary changes with the minimum of impact upon the day to day business through collaboration with all infrastructure service providers (The workplace management, IT, Human Resources).

• Ensure that the workplace changes are embedded into the fabric of the business, so that they do not unravel after the main change initiative has been completed.

• Provide continuing support for changes in organisation, business practices and the way in which the workplace are used in the future.

15.1 Support for Behavioural Change

Mobile technologies are enabling new ways for people to make their contribution to their organisations. This new mobility can enable new work arrangements both inside and outside the office. But to take advantage of these new opportunities requires a careful and conscious programme of activities to prepare the workplace (IT, telecoms, and space), the organisation (security, risk, leadership, processes) and the people (behaviours and working practices) for the transition to new forms of working.

The organisational and behavioural aspects of the change require new skills for workplace leaders with a high level of attention being paid to the engagement of staff and leaders. As a change leader the workplace leader must demonstrate knowledge and credibility in the science of behavioural change.

Best Practices include:

• The development of a coherent, evidence backed ‘Case for change’ explaining what the news of working are, why the organisation should take them up, how they will work in practice and how the transition will be made and sustained.

• The leadership and facilitation of a cross disciplinary team involving all stakeholders involved in the change (typically HR, IT, Telecoms, Risk, Security, Internal Communications)

• The creation of an effective ‘Governance’ structure to implement a mandate for change, make decisions and agree communications mechanisms and messages

• The generation and support for a network of ‘Champions for change’.

• The generation of a communications plan to ensure that truth about the change is consistently understood enabling people to make a ‘mental trade off’ in relation to their wins and losses from the changes proposed.

15.2 Installs, Moves & Additions

The modern workplace is a complex system. A traditional office move may on the surface look like a simple change, however in practice it requires a good understanding
of the current state of workplace infrastructure and careful planning to ensure a smooth and fault free experience for the workplace consumers. This aspect of the framework deals with the management of changes to physical infrastructure to new locations, in moving existing equipment, to accommodating increases/decreases in headcount, acquisitions and disposals.

Best practices include:

- The development of detailed processes that define: how a workplace change is defined and applied for a business unit, the process for determining the validity of the change, an assessment of the technical preparations, the logistics and communications and acceptance testing.
- The maintenance of comprehensive records defining the current state of the workplace including items such as power capacity, data cabling capacity, HVAC, lighting, layouts etc.
- Well-developed relationships and understandings between all the parties that have to work together to deliver the change e.g. consumers, IT, telecoms, building services, space planning, project management etc.
# PROJECT MANAGEMENT

## Definition for this Framework

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

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

## Outputs

### Strategic
- All FM projects are reviewed in terms of their fit to the strategic plans.
- Risks are actively managed.
- The project/programme governance authorises all significant changes.
- Project/programme management skills are developed.

### Delivery
- Multiple Projects involving the interests of multiple stakeholders are successfully managed.
- The benefits of the project are realised.
- Projects are delivered to time, scope and cost.
- Reports are delivered as planned.
- Post implementation reviews (PIR) are done.
- Learnings from PIRs are progressed.

## Other useful sources

- The Facilities Management Professional Standards Framework
- BIFM February 2014
- ISO 21500 Guidance on Project Management 2012
This capability covers best practices skills and processes that deal with the whole project management cycle. This includes justification, governance, financial management and change management, to implementation, completion and post project review. These support the aims of:

1. Meeting project sponsors requirements.
2. Achieving desired outcomes.
3. Learning from past experiences.

Best practices should exhibit evidence that all the following practices have been considered. The degree of detail will depend upon the scale of the project.

16.1 Defining Requirements

16.1.1 Sponsors and Governance

The role of business sponsors and the project governance mechanisms should be clear to all project members. Any significant changes to the sponsors should be taken into account in re-evaluating project risks.

Best practices include:

- The provision of an effective governance structure defining the parties to be involved in the project and their respective roles.

16.1.2 Risk Assessment

Any project brings with it risks. The determination of project risks, and the potential implications and business impacts is a critical capability which will drive decision-making.

Best practices include:

- The provision of clearly define processes to undertake a comprehensive risk assessment which will include: identification of risk, probability, impact, exposure, mitigating actions, contingency plans, and triggers.
- The initiation of an ongoing process of assessments during any project where significant risk factors have been identified, resulting in a published status report.
- The maintenance of records to provide evidence that a systematic approach has been used to assess and manage risks.

16.1.3 Project/Programme Quality Plan

Effective project management involves a rigorous planning process to determine a Quality Plan for the project that makes visible all aspects of the thinking associated with the plan.

Best practices in relation to the project plan:

- **Quality expectations.** The plan defines the standards and level of quality expected from the project in the funding call.
Acceptance criteria. The plan defines acceptance criteria for major project outputs based upon the quality expectations set in the funding call.

Quality plan. The plan includes a quality assurance plan showing how it will achieve the quality expected and the quality assurance processes it will put in place.

Implementation. The plan defines the outputs and outcomes which when implemented are tested against the plan.

Acceptance of outputs. The project submits its outputs, supported by evidence that they meet the quality expectations. Outputs are assessed against the acceptance criteria and accepted (or rejected) by the programme.

### 16.1.4 Project Communication Plan

A well planned project has a well-planned Communication strategy. The following is an example of such a Project Communication Plan.

<table>
<thead>
<tr>
<th>What</th>
<th>Who/Target</th>
<th>Purpose</th>
<th>When/Frequency</th>
<th>Type/Method(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiation Meeting</td>
<td>All stakeholders*</td>
<td>Gather information for Initiation Plan</td>
<td>FIRST Before Project Start Date</td>
<td>Meeting</td>
</tr>
<tr>
<td>Distribute Project Initiation Plan</td>
<td>All stakeholders*</td>
<td>Distribute Plan to alert stakeholders of project scope and to gain buy in.</td>
<td>Before Kick Off Meeting Before Project Start Date</td>
<td>Document distributed via hardcopy or electronically. May be posted on project website Project Snapshot or “Lite” Initiation Plan</td>
</tr>
<tr>
<td>Project Kick Off</td>
<td>All stakeholders*</td>
<td>Communicate plans and stakeholder roles/responsibilities. Encourage communication among stakeholders.</td>
<td>At or near Project Start Date</td>
<td>Meeting</td>
</tr>
<tr>
<td>Status Reports</td>
<td>All stakeholders and Project Office</td>
<td>Update stakeholders on progress of the project.</td>
<td>Regularly Scheduled. Monthly is recommended for large/midsize projects.</td>
<td>Distribute electronically and post via web/OIT Blackboard site. Status Report</td>
</tr>
<tr>
<td>Team Meetings</td>
<td>Entire Project Team. Individual meetings for sub-teams, technical team, and Functional teams as appropriate.</td>
<td>To review detailed plans (tasks, assignments, and action items).</td>
<td>Regularly Scheduled. Weekly is recommended for entire team. Weekly or bi-weekly for sub-teams as appropriate.</td>
<td>Meeting Detailed Plan</td>
</tr>
<tr>
<td>What</td>
<td>Who/Target</td>
<td>Purpose</td>
<td>When/Frequency</td>
<td>Type/Method(s)</td>
</tr>
<tr>
<td>------</td>
<td>------------</td>
<td>---------</td>
<td>----------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Project Advisory Group Meetings (this may apply only to larger projects)</td>
<td>Project Advisory Group and Project Manager</td>
<td>Update Project Advisory Group on status and discuss critical issues. Work through issues and change requests here before escalating to the Sponsor(s).</td>
<td>Regularly Scheduled. Monthly is recommended.</td>
<td>Meeting</td>
</tr>
<tr>
<td>Sponsor Meetings</td>
<td>Sponsor(s) and Project Manager</td>
<td>Update Sponsor(s) on status and discuss critical issues. Seek approval for changes to Project Plan.</td>
<td>Regularly scheduled Recommended biweekly or monthly and also as needed when issues cannot be resolved or changes need to be made to Project Plan.</td>
<td>Meeting</td>
</tr>
<tr>
<td>Executive Sponsor Meetings (this may apply only to larger projects)</td>
<td>Executive Sponsor(s) and Project Manager</td>
<td>Update Sponsor(s) on status and discuss critical issues. Seek approval for changes to Project Plan.</td>
<td>Not regularly scheduled. As needed when issues cannot be resolved or changes need to be made to Project Plan.</td>
<td>Meeting</td>
</tr>
</tbody>
</table>

There should be evidence that such plans are commonly used.

16.1.5 Resource Planning and Budgeting

The Project plan should evidence those milestones that have been determined. A best practice plan would include:

**Milestone planning:** Types of Milestones
- Major—culminates in a deliverable, and transitions between phases and transitions responsibility across roles
- Interim—indicates early progress and segments large work efforts into workable pieces

Function of Milestones
- Used as review and synchronization points
- Used to assess progress and to make mid-course corrections
- Represents team and customer agreement to proceed

**Project initiation:** The start of a new project should be a formal agreement and be on the basis that all pre-project activities have been completed.
Reporting: Agreement to the reporting level, frequency and detailed content of reporting should be a pre-project activity as described in the Project Communications Plan.

**Change control:** For large projects there should be a formal process whereby changes to requirements are discussed and agreed and where the consequences of the change are communicated.

**Project close out:** It is important that projects are not finished until the sponsor is satisfied that the requirements have been fully met. As with project initiation this requires a formal sign off.

Post implementation reviews
- Post-project reviews ensure continuous learning
- What went well?
- What went poorly?
- What should be done differently?
- Recommendations for the future
- Purpose is to facilitate individual and organizational learning
- Post-project meetings can also be conducted at key milestones of long projects
17 GLOSSARY

BCP  Business Continuity Plan
BIM  Building Information Modelling
BREEAM  BRE Environmental Assessment Method
CAFM  Computer Aided Facilities Management
CEM  Certified Energy Manager
CRE  Corporate Real Estate
FM  Facilities Management
HR  Human Resources
HS&E  Health & Safety and Environment
HVAC  Heating Ventilation & Air Conditioning
IT  Information Technology
KPI  Key Performance Indicator
LEED  Leadership in Energy and Environmental Design
NEBOSH  National Examination Board in Occupational Safety and Health
OHSAS 18001  Occupational Health & Safety Management Systems
PI  Performance Indicator
Prince 2  A Project Management Methodology
SELA  Service Experience Level Agreement
SLA  Service Level Agreement
TCO  Total cost of ownership
TOM  Target Operating Model
WM  Workplace Management
18 ACKNOWLEDGEMENTS

The authors, Dr Graham Jervis and Andrew Mawson of AWA, would like to recognise the contribution of a wide number of professionals from all sides of the industry who have generously given their time, energy and intellectual input to our working party that has taken the early models articulated in Graham’s book (Moving on…..From FM to Workplace Management) to build and shape the content of this document which represents the groups understanding of the best practices in the industry at this time.

Mary-Louise Gray  Deutsche Bank
Deborah Rowlands  Ministry of Justice
Stephen Love  Bank of America
Darren Shiels  Ernst & Young
Raj Krishnamurthy  Interserve
Mike Brown  Interserve
Lucy Jeynes  Larch Consulting
Jennifer Pigden  Blue Sky Project Management and Consultancy
Craig Owen  Friends Life
Neil Webster  Remit Consulting
Andrew Waller  Remit Consulting
Dave Wilson  Effective Facilities
David Sterry  AWA
DISCLAIMER / COPYRIGHT

This document is intended as a general information publication and is based upon material in our possession or supplied to us, which we believe to be reliable. Whilst every effort has been made to ensure its accuracy, we cannot offer any warranty that factual errors have not occurred. We therefore take no responsibility for any damage or loss that may be suffered by reason of any such inaccuracies.

All rights reserved. No part of this publication may be reproduced or used in any form or by any means, graphic, electronic or mechanical, including photocopying, recording, taping, or information retrieval systems, without the prior express permission in writing of Advanced Workplace Associates Limited.