

# NEED CONSULTANT HERE'S HOW



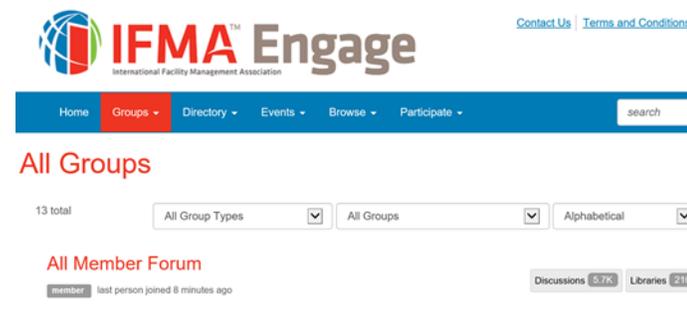
FM CONSULTANTS  
COUNCIL

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2019 Supplement

**Welcome** from the team at FMCC to the first issue of the Supplement to *“Here’s How”*, the guide developed to assist our members and the wider IFMA network to select, engage and work with an FM consultant. Our goal is to guide expectations for fit and performance when consultants and client organizations work together. Supplements like this are one of the ways that FMCC will carry forward from the work completed in 2018 to publish the first version of the resource *Need a Consultant? Here’s How*, which covers from the time that an FM recognizes need for a consultant, to evaluating FM performance during and after the project.

## Why would an FM need a Consultant?

When the idea comes up to bring a consultant on board, typical FM responses can be, I don’t have the budget, or



S/N	Discussions	Posts	Thread Post	Thread Interest	Practical Support provided	FMCC Needs Tip
1	Add move or change policy	105	I am looking to create an occupancy add, move, and change policy and was looking to see if any of you can share your existing policies.	Draft Policy Document	Policy document - MAC Manual by Mbyeng	Various FM Policies, Standard Operating Procedures
2	Challenges Facing Facilities Managers	12	Various Budget, resources, quality, impact on decision making in the c-suite	Sharing the challenges of FMs		FM Audits. Identification of needs and gaps
3	Strategic Facilities Plan	14	How do I get support to develop a SFP	Strategic Plan guide	IFMA Whitepaper	Strategic Planning for Portfolio

my boss would never let me, and/or we should be able to do this ourselves.

A long time FMCC member and volunteer, Michel Theriault described the responses mentioned, noting that they need remain a challenge for FM professionals and organizations when an FM consultant could be valuable.

Looking through FM Engage, a primary online forum for IFMA members, provides insights on both long time and trending FM needs and how FM professionals go about meeting them. This supplement will follow a thread from FM Engage to illustrate how a consultant can provide support in one time or first time tasks.

## Strategic Facilities Plan Example

An Engage post requesting a Strategic Facilities Plan serves as an example of how the FM consultant can become a resource for the client organization FM team.

A colleague asks, "How do I get support to develop a Strategic Facilities Plan" (SFP)<sup>1</sup>. Many FMs must produce a yearly Strategic Plan for capital expenditures, or extend the one-year O&M budget into a contingency plan beyond the next fiscal year. If time is short, as planning opportunities tend to be, topping up previous figures by a percentage and updating a capex project wish list can be a casual solution, possibly adding a sustainability target to help secure funds. Is there a better way?

Yes. Going back to the Engage thread, several helpful approaches are follow in the discussion, including pointing out an IFMA White Paper on Strategic Facilities Planning.<sup>2</sup>

<sup>1</sup> <https://engage.ifma.org/groups/community-home/digestviewer/viewthread?GroupId=55&MessageKey=840a0f1d-cf35-41cd-8d1a-d9c76e864a3f8&CommunityKey=d8bb96d9-817e-4e9e-bd09-374ca5fad2a1&tab=digestviewer&ReturnUrl=%2fgroups%2fcommunity-home%2fdigestviewer%3fcommunitykey%3dd8bb96d9-817e-4e9e-bd09-374ca5fad2a1%26tab%3ddigestviewer>

<sup>2</sup> [https://higherlogicdownload.s3-external-1.amazonaws.com/IFMA/IFMA%20Strategic%20Facility%20Planning%20White%20Paper%20\(2009\).pdf?AWSAccessKeyId=AKIAJH5D414FWRALBOUA&Expires=1552238530&Signature=4JGg2hZtAWPNf%2BRDnJ3mI8pzWQ%3D](https://higherlogicdownload.s3-external-1.amazonaws.com/IFMA/IFMA%20Strategic%20Facility%20Planning%20White%20Paper%20(2009).pdf?AWSAccessKeyId=AKIAJH5D414FWRALBOUA&Expires=1552238530&Signature=4JGg2hZtAWPNf%2BRDnJ3mI8pzWQ%3D)



The White Paper shows an underappreciated fact: *Since SFP is not a daily task, many facility managers are unfamiliar with the best way to accomplish this type of planning, or perhaps have been asked by senior management to quickly provide a strategic facility plan and are not sure of where to start.*

Facility managers unsure how to initiate and carry through the SFP process need to know methods and techniques to successfully create an SFP that corresponds with their organization's needs.<sup>3</sup>

The SFP model applied in this case shows the direction to take to manage and optimize its portfolio with regard to business goals. The model core is the collection of data and analysis.

- SWOT Analysis
- Scenario Planning
- Gap Analysis among elements such as organization business plan, facilities master plan, human resources
- Benchmarks for performance, budgeting
- Feasibility studies for emerging strategies
- Recommendations

### Consultant as Resource?

In reality, FM core functions still loom, and the firefighting of day-to-day issues never ends, interrupting and delaying the SFP. The strategic FM needs of an organization may be best identified by adopting the SFP guideline to develop requirements and formulate scope for a Request for Quotation (RFQ) from a consultant to assess the costs, activities, mileposts, and a potential timeline for the SFP.

### Deliverables to Expect

FM organizations often do not have tried and tested analytic tools to make quantitative projections or even a

qualitative approach to set target outcomes in strategic planning. External benchmarks can be scarce. Data is often limited to the organisation portfolio itself, whilst a market benchmarks could assist in developing targets for the organisation and the FM team such as:

- Utilization per sq ft per asset class
- Energy consumption per sq ft per asset class
- FM Resources per m<sup>2</sup> of assets
- FM Service Delivery Methods by Asset Class

A Consultant who works regularly with these performance parameters in strategic planning can quickly ease a daunting situation, making use of information available or easily acquired, and join with the FM team to deliver the plan.

### More from Engage

Engage posts demonstrate a variety of FM challenges - needs often not being met within FM organizations. Most are capabilities are found widely among consultants.

1. Policy Development
2. Development of Fixed Asset Information Models and capturing Asset Data
3. Resource Assessment; Budget and Manpower
4. Portfolio Utilisation Studies
5. Capital Replacement Strategies
6. Lifecycle Costing Plans
7. FM Strategy - Master Plan development (at all stages)
8. Capital Replacement Strategies

### Conclusion

The cited whitepaper in this example guides creation of an SFP. When this is an unaccustomed task, or when other high priority work competes for FM time before a deadline, the value of using a consultant is clear. In addition, the consultant, simply by involvement, can help bring direction and awareness of the FM role in the organization. The basic question is always what do I need, how soon, to meet which targets, and what can I afford? Additionally, learning and capabilities we gain by working with a consultant can be a strong consideration.

### Coming Up

A future article will focus on the business case for an FM Consultant. When can using a consultant reduce FM costs?

Author Karla Reid, FM Consultant in Abu Dhabi, manages the *Here's How* project.

<sup>3</sup> IFMA Whitepaper – Strategic Facilities Planning

Terry Cocherl and David Reynolds provided copy editing.

We welcome your feedback and ideas.

<https://fmcc.ifma.org/need-a-consultant-heres-how-guide/>

## SECTION 2: HOW TO BUILD A BUSINESS CASE FOR AN FM CONSULTANT

Peter Stroup and Richard Fanelli

Obtaining the expertise of an FM Consultant is a practice