

NEED CONSULTANT HERE'S HOW



FM CONSULTANTS
COUNCIL

May/ June
2019 Supplement

Welcome from team of FMCC to the second feature of “*Here’s How*”. The guide was developed to support our members and the wider IFMA network select, engage and work with an FM Consultant.

In this supplement we will explore the key inputs to **develop, deliver** and **win** the business case for hiring an FM Consultant.

In our presentation; Peter Stroup & Rich Fanelli provided the foundation for understanding the needs and identifying the roadmap to get the FM Consultant on board. Though a more established tool, the business case (*in more modern PMI terms known as the Project Charter¹ for some organisations*) is at the heart of any successful project whether formal or informally presented.

“Our new FM challenge is to provide greater transparency and accountability while managing external and internal driving forces”

Jim Whittaker ²highlights the drivers that push FM Professionals to understand what they need, who are their influencers and detractors. This is the basis of understanding what they need and how to get it.

Develop

Information, right information and strategic information.

¹ Brown, A. S. (2005). The charter: selling your project. Paper presented at PMI® Global Congress 2005—North America, Toronto, Ontario, Canada. Newtown Square, PA: Project Management Institute.

² http://www.ifma.org/fmj/Sept/Oct_Issue_FMJ/ Jim Whittaker; making the case for FM Standards

In the “How to presentation” Stroup/Fanelli³ noted that the qualitative base for a business case lowers the outcome whilst quantitative groundwork will be most favored especially when it impacts the bottom line.

It’s been our experience that FM Professionals will find the usual challenge in developing, delivering, winning or losing the case for their annual Opex or CAPEX facility budgets on a routine basis. “Packaging is everything.....

There are various popular methods to develop a business case⁴ Harvard Business School⁵ has offered some additional tips which many of us will identify with whether the case is quantitative or qualitative.

- Know the need
*What happened? How do we make it better?
Would also add the impact if this need is not met.*
- What’s important to your audience
Is it Financial, Corporate Social responsibility, growth, competitive edge with technology or core business?
- Drop the pennies
What’s in it for the stakeholders? Use informal meetings, monthly reports to make the crescendo for your case
- What delivers best;
Is it a formal BC Report, presentation or site tour.

Deliver

Having established the case, it needs to be delivered.

The key here is to complete the Option Analysis that makes the answer to the question and inevitable yes to hire an FM Consultant.

Packaging is everything

³

⁴ Larson, R. & Larson, E. (2011). Creating bulletproof business cases. Paper presented at PMI® Global Congress 2011—North America, Dallas, TX. Newtown Square, PA: Project Management Institute

⁵ <https://hbr.org/2014/07/the-right-way-to-present-your-business-case>

- Formal; Report, Presentation
 - Bespoke Organisation Templates
 - PMI Offers some Project Charter references-
http://www.mastering-project-management.com/support-files/pmbok_project_charter_template.pdf
 - Presentation; with case videos, brief financials and “what’s in it for me” themes can be a sure winner
- Informal; Site Meeting/ demonstration/ Introductory Consultant Briefing

Win

How would your business case look for an FM Consultant?

John Rimmer in his FM360 series offers valuable tips to close the deal.⁶

It ultimately comes down to the package and knowledge of who will receive the gift.

FM services and even more so Consulting is a hard sell as FM is the first cut in any budget.

SAMPLE

Capital Renewal Business Case Presentation;
 Provides a Case study to demonstrate these themes;



to provide a high level example of the inputs that would make the case for the prevailing situation.

[General Estates Corporation Business Case Presentation](#)

Now that we have won the case;

⁶ <http://fm360consulting.com/selling-your-business-case-closing-the-deal/>

How do we get the right Consultant at the right price?

FMCC volunteer Karla Reid, FM Consultant in Abu Dhabi, manages the *Here’s How* project and is primary author of this series.

Our next Supplement will focus on “How to procure an FM Consultant”

We look forward to your feedback and ideas.

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



[Further Reading:](#)

<https://treasury.govt.nz/information-and-services/state-sector-leadership/investment-management/better-business-cases-bbc>

<https://blog.learningpeople.com/how-to-write-a-business-case-lessons-from-a-certified-pmp>