

NEED A CONSULTANT HERE'S HOW

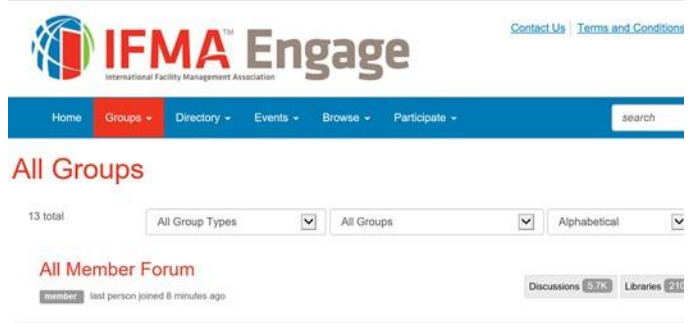


Why would you need a FM Consultant?

Welcome from the team at FMCC to the first Supplement to our booklet **“Need a Consultant? 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.

Why would an FM need a Consultant?

When the idea comes up to bring a consultant on board, typical responses can be: ‘We 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, Standart 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 nees 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 can to do this ourselves and save money.’

FMCC member and volunteer, MichelTherault described the ‘typical’ responses mentioned above, noting that they remain a challenge for FM professionals and organizations to work out when an FM consultant would be valuable.

IFMA Engage, a primary online forum for members, provides insights on both past and trending FM needs and how FM professionals go about meeting them. This Supplement will follow an inquiry from FM Engage to illustrate how a consultant can provide support in setting goals, strategic planning and/or listing the tasks required to meet the strategic plan (and organizational goals).

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?’¹. Many FMs annually produce or review a Strategic Plan for capital expenditures, operational improvements, sustainability goals, and other organizational priorities. If time is short, as planning opportunities tend to be, less careful attention by inside staff who already have enough other work to do.

Is there a better way?

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

1 <https://engage.ifma.org/groups/community-home/digestviewer/viewthread?GroupId=55&MessageKey=840a0f1d-cf35-41cd-8d1a-d9c76e864a3f&CommunityKey=d8bb96d9-817e-4e9e-bd09-374ca5fad2a1&tab=digestviewer&ReturnUrl=%2fgroups%2fcommunity-home%2fdigestviewer%3fcommunitykey%3dd8bb96d9-817e-4e9e-bd09-374ca5fad2a1%26tab%3ddigestviewer>

2 [https://higherlogicdownload.s3-external-1.amazonaws.com/IFMA/IFMA%20Strategic%20Facility%20Planning%20White%20Paper%20\(2009\).pdf?AWSAccessKeyId=AKIAJH5D4I4FWRALBOUA&Expires=1552238530&Signature=4JGg2hZtAWPNfI%2BRdnj3mI8pzWQ%3D](https://higherlogicdownload.s3-external-1.amazonaws.com/IFMA/IFMA%20Strategic%20Facility%20Planning%20White%20Paper%20(2009).pdf?AWSAccessKeyId=AKIAJH5D4I4FWRALBOUA&Expires=1552238530&Signature=4JGg2hZtAWPNfI%2BRdnj3mI8pzWQ%3D)



The White Paper reveals 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 planning process need to know the methods and techniques required to successfully create plan that corresponds with their organization's needs.³

The model applied in this case shows the direction needed to manage and optimize its portfolio regarding business goals. The model core is the collection of the following 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?

As mentioned, for internal FM staff core functions still loom, and the firefighting of day-to-day issues never ends, disrupting the time needed to properly plan. The strategic needs of an organization may be best identified by adopting the plan guideline to develop requirements and scope for a Request for Quotation (RFQ). This can then be sent to FM Consultants to respond to the RFQ criteria with feedback on costs, activities, milestones, and a final delivery date.

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. Obtaining reliable external benchmarking information can be scarce. Data is often limited to the organisation portfolio itself, while industry wide benchmarks could assist in developing targets for the organisation and the FM team such as:

- Utilization per sq ft per asset class or square meters
- Energy consumption per sq ft per asset class or square meters
- FM Resources per m² 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 human resources
4. Portfolio utilization studies
5. Capital replacement strategies
6. Lifecycle costing plans
7. FM Strategy - Master Plan development (at all stages)

Conclusion

The cited whitepaper in this example guides the creation of an Strategic Facilities Plan. When this is an unaccustomed task, or when other high priority work competes for FM time, the value of using a FM Consultant is clear. In addition, the FM 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.

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³ 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/](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