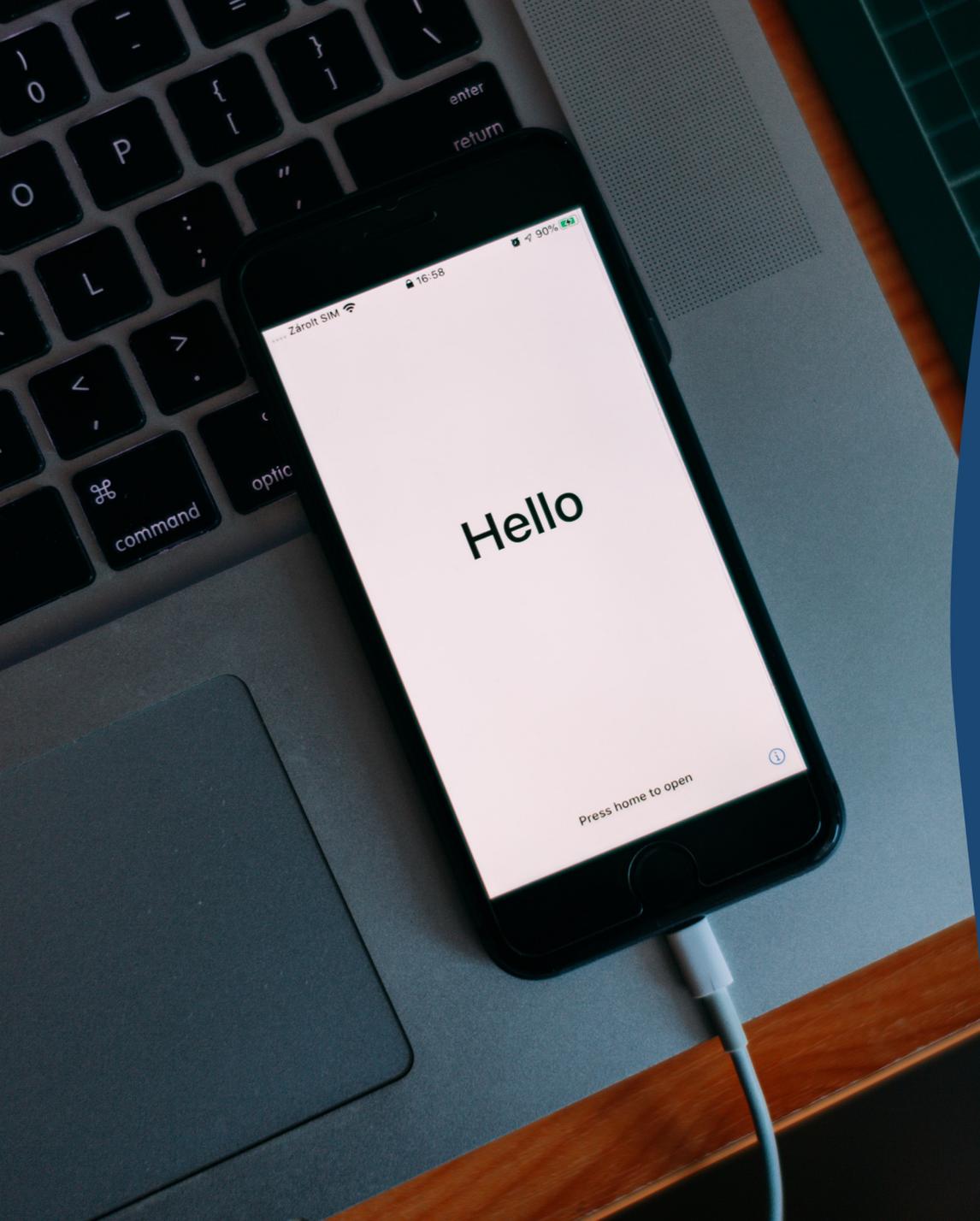


# The Integrated Workplace Management System (IWMS) Guide

Authors: Neil Plumridge & Mike Large





# Introduction

- Are you planning on procuring and implementing an IWMS but not sure what needs to be considered?
- Maybe you aren't sure whether an IWMS is right for your organisational requirements?

In this guide, we'll aim to cover these points, provide guidance, demystify this market and inform your internal strategic decision-making process.

# About the Authors

## Neil Plumridge – Business Development Manager I MACS EU



I have been Implementing solutions for Corporate Real Estate including CAD/CAFM/IWMS since the mid 1980's and have seen a lot of changes over that time. I have helped many household names, including the BBC, British Airways, GlaxoSmithKline, Barclays Bank, Transport for London, Pfizer, Astra Zeneca, and the Ministry of Defence. Now, as the Business Development Manager at MACS EU, I am working with client's who are at the beginning of their IWMS journey.

## Mike Large – Director | Centaur Solutions Limited



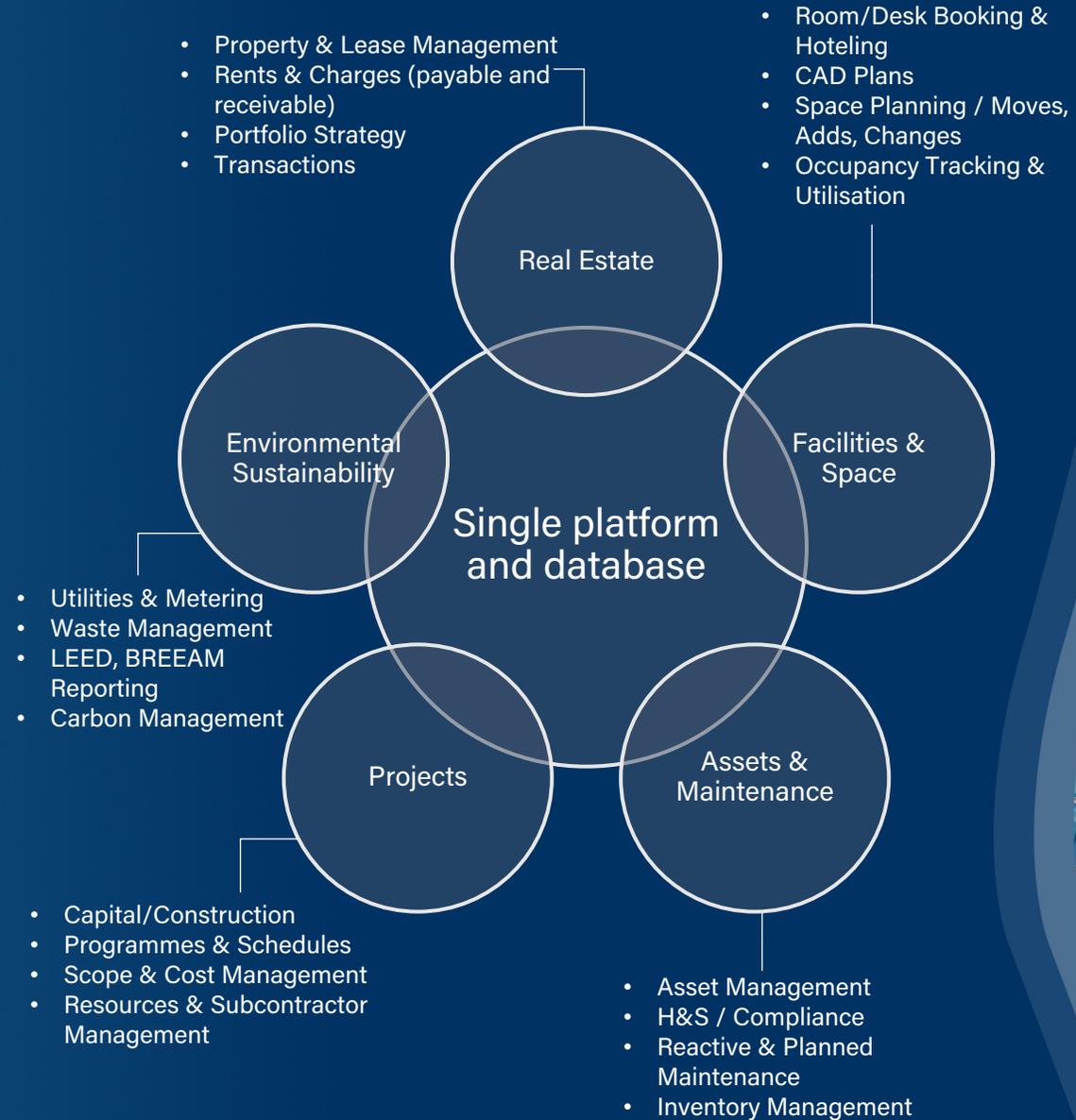
During the last 15 years working in Real Estate and FM, I have either researched, procured or implemented IWMS solutions. There are without doubt lessons to be learnt along the way which prompted this guide. With the pace in which technology moves and the impacts of COVID on the workplace, the IWMS market is likely to be a growth area, as organisations seek to address the required changes to their strategic portfolio plans, maximise the usage of their retained property and minimise their costs.

# What is an IWMS?

There are many definitions or interpretations available when you engage for your trusted internet search engine. However, Gartner offers arguably the most definitive:

*"An enterprise class software platform that integrates five key components of functionality, operated from a single technology platform and database repository. These are:*

- *Real estate and lease management*
- *Facilities and space management*
- *Asset and maintenance management*
- *Project management*
- *Environmental sustainability management"*



# Why is “Platform” important?

The reason for highlighting the word “platform” when describing an IWMS is because there are solutions on the IWMS market that started life as a point-solution (or single function), such as a CAFM or CAD/Space Management, but then additional bolt-on modules were developed, to give the range of ‘functional capabilities’ found in an IWMS.

An IWMS Platform, however, has been specifically developed to work as an IWMS from the outset and is therefore integrates seamlessly, which enhances the end user experience and shares common data across the functional areas. A genuine IWMS often has a more open architecture approach, offering greater flexibility for configuration, customisation and integration with your other solutions, such as ERPs, IoT devices, sensors, smart meters etc.

## What may I encounter if it isn't a genuine IWMS Platform?



A solution that has one strong functional area, with others lacking the depth of either established IWMS platforms, or best of breed solutions.



A solution that may not look or feel that joined-up as the various functional modules were developed at different times.



A complex architecture with the core system and the additional functional modules coupled together at the application and database layers. This can complicate integrations with your other solutions and make upgrades more challenging.



A less comprehensive roadmap of future development as there is no single platform to work with.

# Who are the main players?

The various software vendors will argue whether they are a genuine IWMS platform, or an evolved point solution, with other modules then developed and bolted on. Gartner has a Magic Quadrant for the IWMS market, as does Verdantix, but its always best to **SEEK ADVICE from those with experience** to help you find the solution that best fits your requirements and goals.

The most established and recognised global IWMS platforms include:



# 9 key areas to consider

<p><b>1</b> </p> <p><b>End Game</b></p> <ul style="list-style-type: none"><li>• Are you going to utilise the full range of functionality found in an IWMS, or are you just looking for a specific solution, such as a Maintenance Management (CAFM) or Lease Management solution? If the latter, maybe an IWMS is overkill, and you would be better served by a point solution.</li></ul>	<p><b>2</b> </p> <p><b>Operating Model</b></p> <ul style="list-style-type: none"><li>• Which real estate services have you outsourced? You'll need to consider how your IWMS is going to impact and integrate with your supply chain.</li><li>• Are you planning on outsourcing any services? You'll need to factor this into your systems strategy and your various procurements.</li></ul>	<p><b>3</b> </p> <p><b>Integration</b></p> <ul style="list-style-type: none"><li>• Establish your overall solution architecture from the outset and understand how introducing an IWMS needs to interact with your existing systems., including all relevant security requirements.</li><li>• Integration takes time and can be costly, so ensure there is an absolute business need e.g., to facilitate a business process or to share master data sets.</li></ul>	<p><b>4</b> </p> <p><b>Resources</b></p> <ul style="list-style-type: none"><li>• Identify your project roles and team. Consider all the areas needed to successfully implement an IWMS such as: Project Management, Testing, Change Management, Process Mapping and Data activities.</li><li>• Consider how you will fill the various roles e.g., internal, contractors, consultants etc.</li></ul>	<p><b>5</b> </p> <p><b>Support</b></p> <ul style="list-style-type: none"><li>• Establish your intended support model between your internal applications team and the vendor.</li><li>• Identify your SLAs for each incident category which is appropriate for the criticality of the IWMS in your organisation.</li><li>• Be clear on the process for new functional requirements in BAU.</li></ul>
<p><b>6</b> </p> <p><b>Budget</b></p> <ul style="list-style-type: none"><li>• It is always best to have a budget in mind before you start your journey and to share it with the vendor to ensure you don't expend a lot of time researching a solution that is outside your budget..</li><li>• For large-scale complex implementations, it is difficult for a vendor to fix the costs. It may be easier to fix after an initiation or discovery phase where the vendor is able to obtain more information.</li></ul>	<p><b>7</b> </p> <p><b>Timeframe</b></p> <ul style="list-style-type: none"><li>• Have you set a realistic timeframe from setting your strategy, gathering your requirements, running your procurement to select an IWMS, through to implementation?</li><li>• What is driving your timeframe? Do you have existing systems that are going out of support? Have you left enough time to replace them?</li></ul>	<p><b>8</b> </p> <p><b>Fit</b></p> <ul style="list-style-type: none"><li>• Does your chosen solution keep configuration changes in the database? If not, this could seriously complicate upgrades and patches.</li><li>• Keep configuration to a minimum and start with the basic functionality out of the box.</li><li>• Use your RFP process to confirm how your requirements will be met. If your system requires a lot of customisation, you may have chosen the wrong solution.</li></ul>	<p><b>9</b> </p> <p><b>Data</b></p> <ul style="list-style-type: none"><li>• Identify your data sets for migration, assess the quality and validity. If you want the vendor to do this, it will cost you more. Ideally, you'll have an internal Data Analyst who already knows your data. Also be clear if you are ok that your data may be in the cloud outside of your home country.</li><li>• Your data planning and activities should be starting before you start on your journey to procure an IWMS.</li></ul>	



# IWMS Project Checklist

This is intended as a "general" project IWMS selection and implantation checklist and may not suit all situations. At what stage you decide to address these elements, may impact at a later stages, whether procurement of your IWMS or the implementation of it.

Strategy	People	Process	Data	Technology
<ul style="list-style-type: none"> <li>✓ Vision is set</li> <li>✓ Impacts on outsourcing is known and factored in</li> <li>✓ The case for an IWMS is made</li> <li>✓ The initial budget is established</li> <li>✓ Business and IT onboard</li> </ul>	<ul style="list-style-type: none"> <li>✓ Project Sponsor identified</li> <li>✓ Project team identified</li> <li>✓ Change strategy created</li> <li>✓ Business SMEs identified</li> <li>✓ IT participants identified</li> <li>✓ Testers and End Users identified (for license volumes)</li> <li>✓ User personas established for the volumes per license type</li> </ul>	<ul style="list-style-type: none"> <li>✓ Business process architecture defined</li> <li>✓ Process maps documented</li> <li>✓ Functional requirements captured, logged and prioritised</li> <li>✓ IWMS RFP/Spec documented</li> <li>✓ Procurement approach and evaluation criteria set</li> </ul>	<ul style="list-style-type: none"> <li>✓ Data sources identified</li> <li>✓ Data team identified</li> <li>✓ Data gathering, cleanse, validation and migration strategy and plan created</li> <li>✓ Interim data management solution and process designed and implemented</li> <li>✓ Data activities underway</li> </ul>	<ul style="list-style-type: none"> <li>✓ Info/Data/Cyber Security and other non-functional requirements captured, logged and prioritised</li> <li>✓ Target solution architecture is defined (includes integration requirements)</li> <li>✓ Support model defined</li> <li>✓ Target SLAs for each incident priority drafted</li> </ul>

## Key Success Factors

- ★ Strategy defined and agreed
- ★ Project team in place
- ★ Data activities planned and started
- ★ Buy-in across the organisation
- ★ Requirements clear and documented
- ★ Integration needs identified
- ★ Budget established
- ★ IWMS selected based on meeting requirements and cost
- ★ Business processes documented

# DO

- ✓ **Share your budget expectations early.** You can waste a lot of your own time and effort if the system being proposed exceeds your budget.
- ✓ **Consider your internal costs.** The cost of your own staff can be significant. Often a client assigns more staff than the solution supplier to a project.
- ✓ **Review your data early.** You should check what shape your data is in, and if preferably sanitise it before you even start looking at systems. This has the added advantage of ensuring your data is accurate even if you don't proceed.
- ✓ **Make sure you have the right people on your team.** Don't just chose a PM because he/she will be using the system. You must have experienced people on your team, not just on the supplier side.
- ✓ **Understand what problem you are trying to solve and how it will benefit your company.** Why are you doing this in the first place and at what point have you reached your ROI?
- ✓ **Remember your solution will need appropriately trained and passionate staff** to maintain, enhance and promote its value in BAU.

# DON'T

- ✗ **Ask for a full project plan as part of an RFP.** This can only be accurate after initial reviews and SoW are created. Ask for an "indicative plan" and proof of a standardised delivery methodology.
- ✗ **Ask for a fixed price in the RFP.** Again, this can be provided with the SoW. Fixing the price before the supplier has enough information will lead to inaccurate pricing (and may make the project significantly more expensive).
- ✗ **Base your purchasing decision solely on price.** Just because its cheap, doesn't mean the experience will be cheerful or because its expensive that you will get a "Rolls Royce" experience. Choose what it right for your business needs and budget.
- ✗ **Buy an IWMS when a point solution will do.** You really need to understand why you are looking for an IWMS. If you have one or two issues to resolve a point solution may end up being quicker and cheaper.



A person is sitting on a light-colored sofa in a modern living room. They are leaning forward, using a laptop that is placed on a white, round coffee table. The room has a wooden floor and a large window in the background, suggesting a bright, airy environment.

# Summary

Hopefully, this guide will have provided you with a little more to think about before you make the big decision to invest in an IWMS. In summary:

- ★ Make sure your data is as clean as possible.
- ★ Make sure you understand the problem you are trying to solve and how an IWMS will benefit your company.
- ★ Know exactly what you want, why you want it and when you need it.
- ★ Be clear on how much you want to spend (including software, hosting, configuration, data activities, integration support, maintenance and your own internal team costs).
- ★ Consider your own teams' level of involvement.
- ★ Choose a vendor that becomes a partner, that will actively engage with you and will stick around.
- ★ Make sure you support and grow your IWMS, so it stays relevant. Take those upgrades and enhance it to support your organisation as it changes and evolves.

If you would like any more details or to discuss your IWMS plans, please do reach out to us.



## Contact Us

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