



# Creating an IWMS Implementation Plan



## Overview

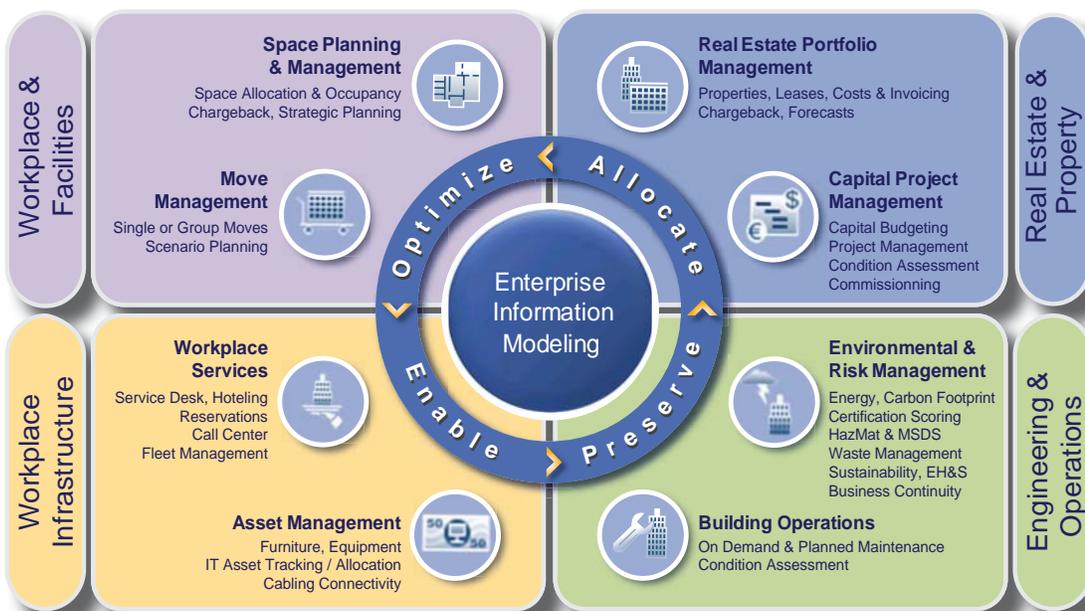
The increased information available through an Integrated Workplace Management System (IWMS) impacts every part of an organization and can dramatically increase the enterprise's productivity in managing real estate, infrastructure, and facilities. Assessing the IWMS opportunity provides a better understanding of the potential benefits that can be optimized with an IWMS implementation. And an IWMS Needs Analysis maps the route to the successful utilization of your information and systems.

### Features of an IWMS Implementation Plan:

- Experienced direction from IWMS specialists
- Definition of a project's strategic goals
- Objective analysis of current methods and systems
- Identification of objectives and prioritization of the required tasks
- Analysis of required resources to achieve optimal results
- Clearly documented implementation plan

### Benefits of a Plan:

- Provides a clear understanding of the project scope
- Develops coordinated efforts and goals
- Reduces costs and time required for implementation
- Avoids redundant responsibilities, tasks, and information systems
- Provides the basis for an efficient and focused implementation
- Increases overall system functionality and process productivity



*A comprehensive IWMS solution addresses the broad array of real estate, infrastructure, and facilities management functions with a fully integrated approach to reduce costs, mitigate risk, and optimize service levels.*

## IWMS Implementation Phases

Once your organization recognizes the need for an integrated workplace management system, the next step is mapping the route to a successful implementation. The opportunity within an organization to optimize the use of its real estate and facilities assets is significant, however, it is important not to underestimate the initial effort required to begin the implementation. Typical phases involved in implementing a successful IWMS solution are:

### Phase 1 - IWMS Needs Analysis

1. Preliminary Assessment
2. IWMS Opportunity Analysis
  - a) Resource Costs Analysis
  - b) Data Requirements
  - c) Data Access and Flow
  - d) Training Requirements
  - e) Implementation Plan and Analysis Report

### Phase 2 - IWMS Solution Design

1. System Design
2. Standards Development
3. Software Personalization
4. IWMS Procedures Guide

### Phase 3 - IWMS Implementation

1. Software Installation
2. Data Development and/or Integration
3. Report Production
4. User Training

### Phase 4 - Post-Implementation Support

1. Technical Support
2. Review and Evaluation
3. System Enhancements
4. Supplementary User Training

This document describes the benefits of an IWMS Needs Analysis, an overview of the activities involved, and the range of IWMS Opportunity Audits that can be performed for different levels of IWMS implementations.

*IWMS dashboards present critical business information that supports strategic and tactical decision-making*



## Why Conduct an IWMS Needs Analysis?

A Needs Analysis is the most important phase of an IWMS project. The primary goals of this analysis are to determine an organization's requirements for managing its physical assets and facilities processes; the optimal approaches for automating these real estate and facilities management tasks; and the resources required.

### Define Project Scope

The Needs Analysis is the phase of the project where purposes of the project are identified; a project team and the roles they will play are defined; issues are prioritized; desired results are identified; the level of effort needed to obtain those results is determined; and an action plan and timeline for accomplishing goals are established.

### Determine Priorities

Each organization has different levels of information systems, data, and methods already in place for managing its real estate portfolio and facilities assets. A Needs Analysis includes a review of existing systems, data sources, and methods; attempts to identify any additional areas that can most benefit from automation; analyzes current methods to see whether they can be improved, and determines the required steps to integrate existing systems. Typically, an organization will want to perform a number of tasks—priorities must be determined in light of the available resources and benefits.



### Establish User-Specific Needs and Personalization

Each organization has unique issues and different means by which to address them. IWMS solutions often come pre-packaged with generic formats for tracking and managing information. However, the best COTS (Commercial-Off-The-Shelf) solutions are also adaptable to unique needs of end-users. A Needs Analysis will identify those areas in which the software should be personalized to best fit the client's needs.

### Specify an Implementation Plan

Implementing a software system without setting goals and detailing the steps required to arrive at those goals is analogous to driving cross-country without a road map or GPS device. A Needs Analysis helps develop a map indicating the route to success. It provides a clear understanding of the obstacles that lie ahead, and plans for the appropriate measures to deal with those obstacles.

## IWMS Needs Analysis Activities

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The Needs Analysis usually involves an on-site visit followed by a period of reporting findings. A number of key areas will be addressed in an analysis of the IWMS requirements of an organization:

### Preliminary Assessment

Prior to the on-site visit, communication is initiated to establish some guidelines and structure for the on-site visit. This involves:

- Identifying and prioritizing needs and goals
- Collecting any relevant materials that the client can provide demonstrating current methods, data, reporting, and capabilities
- Establishing an initial analysis approach
- Determining the scope of the Needs Analysis
- Defining the project team—this may include in-house staff, consultants, software vendors, A/E firms, and others
- Specifying the roles of the project team members to avoid conflicting responsibilities

### Actual IWMS Needs Analysis

#### *Analysis of Current Resources*

The first stage of the on-site visit includes the following key activities:

- Analyzing current capabilities
- Evaluating conceptual reporting and presentation requirements
- Reviewing current space and asset standards

#### *Investigation of Data Requirements*

The next major area of review in the IWMS Assessment includes:

- Evaluating current data models
- Establishing modified data models or developing additional ones
- Examining current data sources and translation requirements

#### *Analysis of Data Access and Reporting Requirements*

The following steps help maximize the benefits of an IWMS system:

- Examining additional reporting benefits
- Analyzing executive information needs
- Identifying key methods and procedures
- Evaluating data flow requirements
- Investigating additional information distribution benefits to other organizational units

## Appropriate Training and Scheduling

An organization may need to provide different levels of training for the Project team, managers, end-users, systems staff, and/or others:

- The IWMS implementation Project Team may need initial training on the default functionality of the system to determine existing methods and which areas need the most discussion and analysis
- Managers may only need an overview and access to summary information
- End-users may need detailed relational database, BIM/CAD, and IWMS training
- Systems support personnel will need to understand the file structure of the IWMS system and possible integration with other ERP systems
- Other topics to explore include: setting up single sign-on with an active directory, automating drawing publishing, automating workflow rules, using Web Services, and scoping global deployments
- Additional staff may need training in features that address their particular needs

## Implementation Plan and Analysis Report

The result of the analysis is a report that incorporates the following deliverables:

- Translating conceptual requirements into actionable entities
- Establishing the key system parameters and components
- Identifying key tasks and milestones
- Determining Action Plan and Timeline alternatives
- Defining on-going technical needs
- Documenting recommendations, implementation options, and associated costs

## Degrees of Assessment

IWMS Needs Analyses can be conducted on a variety of levels, depending on the types of assets to be managed, the number of departments involved, and an organization's overall goals.

### Pilot Assessment

The simplest IWMS Needs Analysis can be conducted as part of the training program. For ARCHIBUS, a typical end-user training program consists of a 4-day course designed to teach the basic skills needed to work effectively with ARCHIBUS and provides an overview of its many business applications. Participants will learn about the basic components of ARCHIBUS - databases, drawings, and reports, and its suite of products – ARCHIBUS Web Central, ARCHIBUS Smart Client, and the Smart Client for AutoCAD and Revit. Participants will become competent in the core ARCHIBUS application domains: Space Planning & Management, Building Operations, Real Estate Portfolio Management, and Asset Management. It may be advisable to budget additional days for initial implementation exercises using the clients' drawings and data. During this training period, the trainer can evaluate the differences between the users' data and the default structure of the system. Minor alterations to the system's structure can be made as part of the training session. If more extensive changes are desired, a proposal can be developed based on the needs determined during the training session.

The benefit of this method is that the user and the software solution provider learn each other's structures at the same time and can more intelligently discuss the issues involved in aligning the client's needs with the system's capabilities. An additional benefit is that the cost involved in getting up and running is, typically, minimal. The drawbacks are that this type of analysis only addresses the needs of those users who are in the training session and may not fully cover the needs of other departments relying on output from the system.



### Immediate IWMS Needs Analysis

An Immediate IWMS Needs Analysis involves in-depth analysis as outlined above in the IWMS "Needs Analysis Activities" section. All departmental representatives are brought together for a number of day-long, in-house evaluations of their current systems, data, methods, and goals. Interdepartmental asset management information needs are discussed as well as internal departmental needs.

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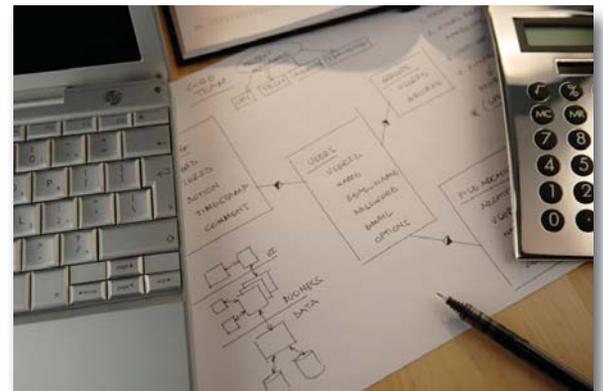
Once the general parameters of the system have been defined, individual meetings are held with department(s) having immediate needs and planning to implement the system immediately. Functional system parameters for the department(s) are specified. The detailed needs of departments who may decide to integrate at a later time are deferred until a later date.

A formal document is prepared which describes the needs of each department and detailed specifications for a proposed solution.

The advantages of this level of analysis are that only the areas that will immediately benefit are analyzed at a detailed level. Start-up time is shorter and data can be implemented quickly in the areas that will realize the most benefit. The disadvantage is that other departments' detailed needs may subsequently involve some rework.

## IWMS Opportunity Assessment

The most extensive analysis is provided by the IWMS Opportunity Assessment. This assessment involves all of the activities of the Immediate IWMS Needs Analysis. In addition, any department that will need access to any of the IWMS information will be evaluated in detail. All cross-departmental data flows will be determined and an attempt will be made to define a system that provides every department with data in the format they require. Departments with existing systems will be evaluated to determine how their systems are best integrated with other departments.



The IWMS Opportunity Assessment allows for the possibility of re-engineering existing workflows and processes rather than merely automating the existing ones. The IWMS Opportunity Assessment can determine where entire cross-departmental facilities and asset management activities may be redefined to be more efficient and productive. An organization may discover that the best way to automate two departments' operations is to merge some of their functions. The data management activities of one department may best be served by the data generated from other departments.

The potential changes in workflow and technology will have an impact on the people in the organization. The IWMS Opportunity Assessment will attempt to identify and balance the risks and benefits that may be associated with significant changes in workflow. Typically, this requires a plan for a phased transition from the current state to the ideal state so that the change can be managed most beneficially.

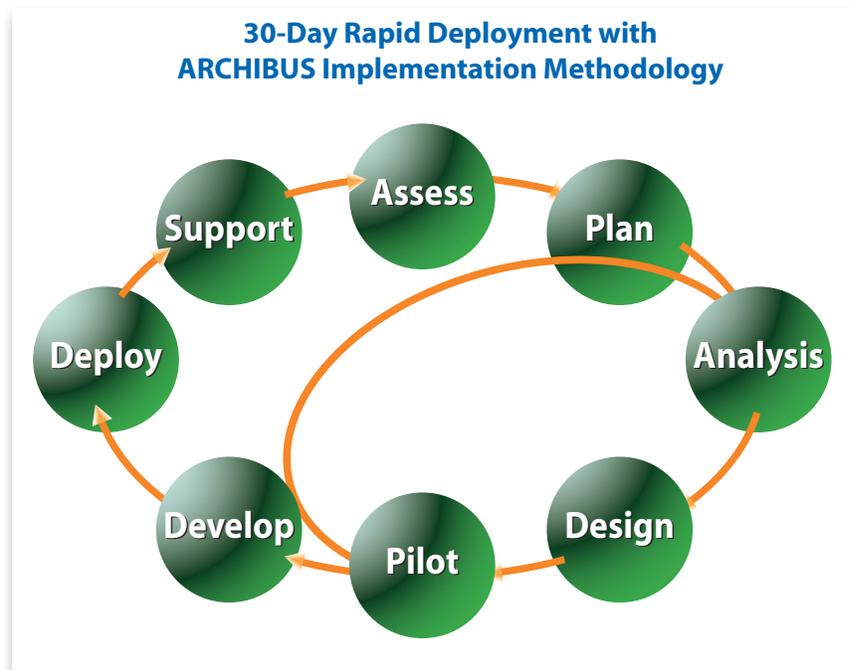
This analysis allows the identification of the ideal IWMS solution and the best target IWMS solution (between the ideal and the achievable). The target is identified by maximizing the potential results/effort ratio. A formal document is prepared which describes the needs of each department, the flow of data throughout the organization, and a detailed specification for a proposed solution.

The benefits of this level of assessment are that the needs of every department are addressed and the resulting specification coordinates all of the data through the organization. In addition, all of the operating processes as well as individual departmental functions are evaluated. This method is not ideal for all projects, though. Evaluating everyone's needs and keeping everyone satisfied can be a lengthy process. Various degrees or aspects of the IWMS Needs Analysis can be combined to match the needs of the client organization.

## Other Deployment Considerations

Don't underestimate the role that experience plays in successfully implementing the necessary systems and processes to transform your real estate, infrastructure, and facilities portfolio.

The ARCHIBUS Implementation Methodology™ is rooted in 30 years of ARCHIBUS, Inc. experience as a pioneer in the development of real estate, infrastructure, and facilities automation solutions. It also aggregates the acquired deployment knowledge based on the best practices and benchmarks of our 4,000,000+ users. Today, you can successfully deploy an ARCHIBUS "commercial-off-the-shelf" solution in as little as 30 days.



Specialized professional services from ARCHIBUS, Inc. and our global network of 1,600+ Business Partners include opportunity/technology audits, implementation planning and support, project creation/migration, application personalization/customization, application integration, implementation/management audits, and more.

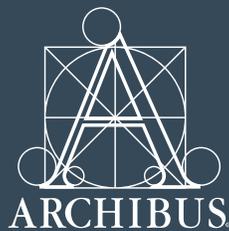
Contact your local ARCHIBUS Business Partner or ARCHIBUS, Inc. Professional Services Group ([professionalservices@archibus.com](mailto:professionalservices@archibus.com) or +1 617-227-2508) for more information on services available, or to arrange a Needs Analysis at your organization.

## About ARCHIBUS, Inc.

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ARCHIBUS is the #1 global provider of real estate, infrastructure, and facilities management solutions and services with the total annual expenditures for ARCHIBUS-related products and services exceeding \$2.0 billion (USD). Through effective innovation and business transformation, ARCHIBUS users save their organizations over \$100 billion (USD) annually. With ARCHIBUS, organizations can use a single, comprehensive, integrated solution to make informed strategic decisions that optimize return-on-investment, lower asset lifecycle costs, and increase enterprise-wide productivity and profitability. ARCHIBUS is the world-wide proponent for the creation of ubiquitous environmental sustainability.

More than 4,000,000 ARCHIBUS enterprise and Web users collectively manage over 5,000,000 properties, with organizations reporting facilities-related cost savings as high as 34%. With over 1,600 ARCHIBUS Business Partners, local and regional support worldwide is available in over 130 countries and more than two dozen languages. Headquartered in Boston, Massachusetts, ARCHIBUS, Inc. has pioneered computer-aided infrastructure and facilities management technologies since 1982. For more information, visit [archibus.com](http://archibus.com).



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