FMX Facilities Management eXpress

FACILITIES MANAGEMENT SOFTWARE BUYER'S GUIDE

A GUIDE TO PURCHASING THE FM
SOFTWARE THAT'S RIGHT FOR YOU

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WHAT IS FM SOFTWARE?

Facilities Management (FM) software enables facilities managers to more effectively track work orders, schedule resources and events, and plan maintenance while controlling costs and preserving asset value.
FM software is a solution that maximizes efficiency, streamlines processes, and delivers insights into facility operations.

Many lines of communication are involved in the everyday tasks that keep facilities up and running. The optimal FM software acts as a centralized hub. It gives staff, tenants, and vendors a place to submit and follow work orders and provides facility managers with insight into maintenance activities and costs. An effective FM software solution will offer:

• Modules for managing work orders, scheduling preventive maintenance, managing inventory and assets, and scheduling events

• Extensive customization options to fit your team's operations

• Robust reporting and analytics

• A simple, easy-to-use interface with a short learning curve

• Mobile access

• Email and text notifications

• A dedicated customer support team and additional educational resources

When used effectively, FM software helps facility departments take better control of their operations and gain deeper insights into their facility's cost and maintenance trends. This guide will help you define your needs and walk you through the buying process, so you can find an FM software solution that best fits your organization.

WHAT ARE THE BENEFITS OF FM SOFTWARE?

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Facilities management is often an understaffed, underfunded department.

Those responsible for managing facilities can find it hard to gather enough information to make decisions. As a result, personnel tend to spend their time reacting to the latest (or loudest) request, leaving less time available for developing or following a proactive maintenance plan. Manually tracking and monitoring work orders and repairs using outdated processes inevitably leads to missed and delayed maintenance activities, double booking of facilities, and increased overall costs. A good FM software helps facility managers decide whether to make a repair or to replace equipment, which work order to prioritize, which staff member to send on a job, and when to do the work. It helps busy FM departments catch up by streamlining their processes and improving the accountability of staff and vendors, saving departments both time and money.

WHAT ARE THE BENEFITS OF FM SOFTWARE?

IMPROVE EFFICIENCY

To a busy facility manager, time is everything. The time it takes to address an issue directly affects your facilities and the happiness of the occupants. FM software enables you to stay organized and automates cumbersome processes that would otherwise eat away at your time. Scheduling preventive maintenance through an FM software also improves uptime and extend the lifespan of your equipment.

Streamline Your Workflow

FM software allows you to pivot quickly between tasks, eliminate disappearing work orders, and automate processes, such as sharing updates on work orders with the requester. Customizable user permissions let you take control of who can interact with what and make approval processes quick and easy.

Extend Lifespan of Equipment

It's no secret that practicing regular preventive maintenance prolongs the life of your equipment, saves energy, reduces downtime, and prevents costly emergency repairs. FM software takes the hard work out of preventive maintenance by providing users with a central place to schedule preventive maintenance tasks, receive automated alerts when tasks must be carried out, and keep up-to-date with required inspections.

WHAT ARE THE BENEFITS OF FM SOFTWARE?

DECREASE COSTS, MAXIMIZE BUDGETS

With FM software, you'll be able to track maintenance, labor, and inventory costs like never before. FM software grants you the ability to pull reports and gain insight into problem areas. This information helps facility managers discover ways to cut costs and improve their facilities.

Discover Cost-Saving Opportunities

When facility management processes are carried out by pencil and paper, or through outdated FM software, you miss out on the chance to view your department's performance and cost data over extended periods of time. An FM software with reporting features helps you analyze data that could lead to fixing or replacing equipment items whose costs outweigh their value.

WHAT ARE THE BENEFITS OF FM SOFTWARE?

IMPROVE ACCOUNTABILITY

It's critical that facility managers keep track of the progress of maintenance tasks to ensure they're completed in a timely manner. FM software helps you keep tabs on the work performance of yourself, your team, and outside vendors. It enables you to keep up with the timelines of work orders, communicate with your team and vendors, and track data, such as the time spent resolving tasks.

Communicate Directly With Your Vendors

By setting up your outside vendors as users within your FM software you can track when communication was sent, if due dates are missed, how long tasks take to be completed, and the payment process that follows project completion. Holding vendors to deadlines set within an FM software has been shown to improve the attentiveness and efficiency of outside vendors.

Evaluate Your Staff's Work Activity

Knowing the ins and outs of your team's work performance is key to providing efficient and effective service to your organization. The ability to assign and review each team member's work orders allows you to stay on top of their work progress. Analytics related to team performance helps you uncover insights such as who is the fastest/slowest at closing out tasks and evaluate if their time is being put to good use.

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WHEN SHOULD WE IMPLEMENT FM SOFTWARE?

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When it comes to FM software, the earlier you get started, the quicker you receive your return on investment.

Still not sure if it's the right time for your organization to pursue a new FM software system? Let's dive into some common reasons why organizations delay implementing FM software, and why these scenarios are actually the perfect time to implement.

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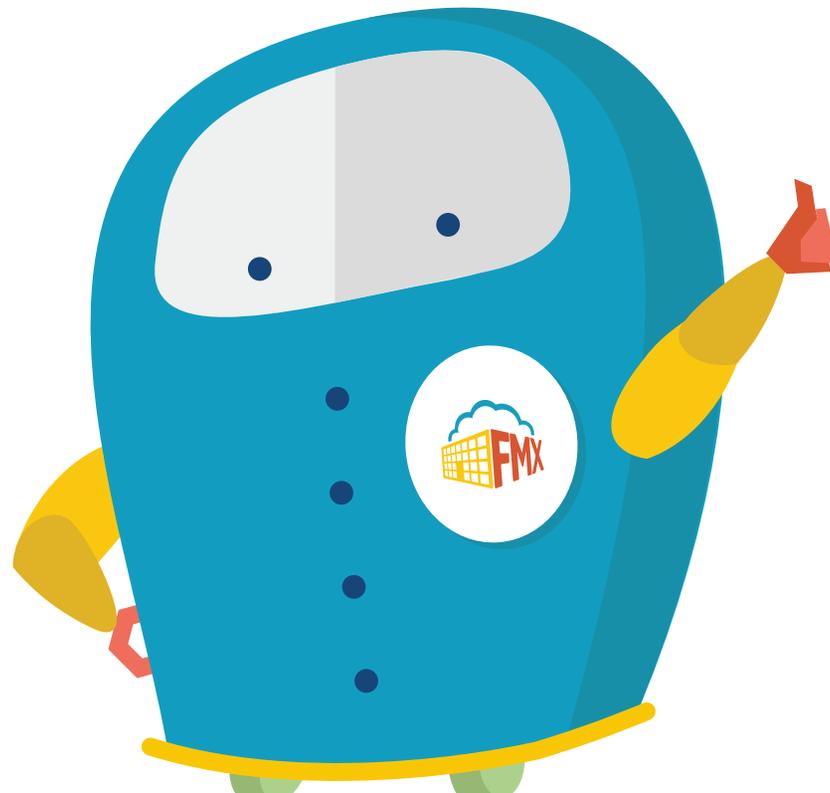
Reason one:

"WE'RE MOVING INTO A NEW FACILITY."

This is your chance to start fresh and protect your investment in a new facility.

It's the perfect time to organize FM tasks and begin an accurate account of inventory, resources, etc.

Because staff will already be adjusting to the new environment, this is an ideal time to introduce a new software so they can grow accustomed to using it in the new space.

Reason two:

"WE'RE HESITANT TO CHANGE OUR CURRENT SYSTEM."

Because you are already familiar with your needs and the capabilities of FM software, you can more confidently assess and choose an FM software that suits your organization better than what you currently have in place.

Loading information into a new FM system will be less of a hassle because your information already exists in your current FM system.

You're already allocating budget to an FM system and FM systems change and improve constantly. It's worth your time to see what else is out there and if you can get a better product for the same amount of money, or less.

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Reason three:

"OUR BUDGET IS TIGHT."

## FM systems have been proven to provide a return on investment in as little as six months.

Create a compelling argument for an FM system by projecting the savings and becoming well-versed on the features and benefits your chosen solution offers.

Investigate cloud-based FM systems. Cloud-based systems generally have a smaller upfront cost than their on-premise counterparts since they follow a subscription-based model.

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EVALUATING FM SOFTWARE SYSTEMS

Finding the right FM software for your organization begins with asking yourself the right questions. We've broken this process down into two steps.
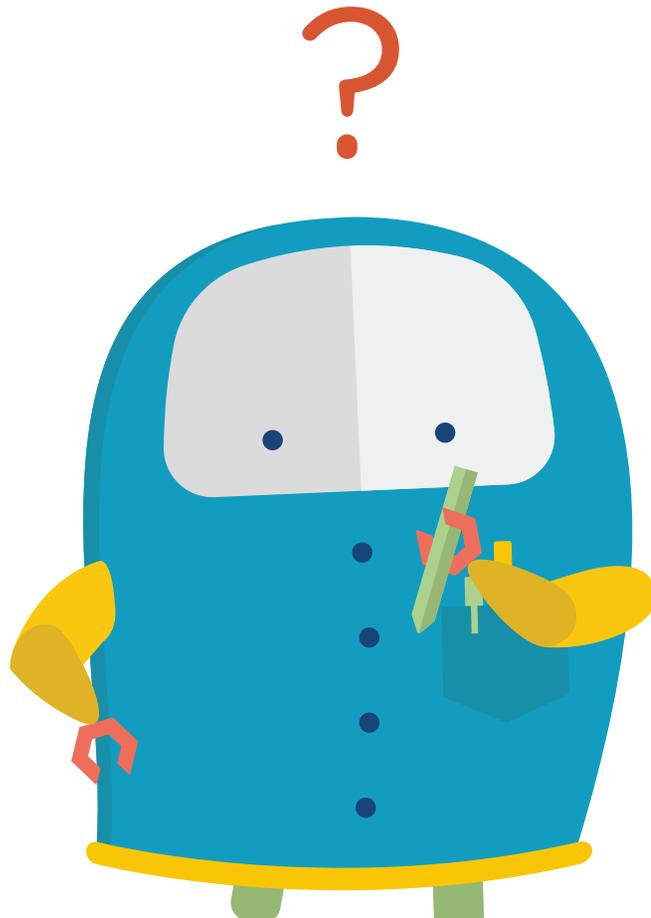
1 STEP ONE:
Self-Assessment

Step one focuses on discovering your pain points. We'll provide you with questions that will help to define your organization's needs.

2 STEP TWO:
Vendor Evaluation

Step two will help you better understand what features are available in most FM systems. With each feature comes a set of key questions you can ask vendors during your evaluation process.

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STEP 1: SELF-ASSESSMENT

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Self-Assessment

Review and answer the following questions about your current processes to help identify your needs and areas that can be improved upon.

• What prompted you to seek out an FM software solution?
   Define three of your largest pain points or challenges.

• What areas are most important to your organization?
  - Work Order Management
  - Preventive Maintenance
  - Event Scheduling
  - Inventory & Asset Management
  - Transportation Scheduling
  - Analytics & Reporting
  - Technology Ticketing
  - Purchase Order Management

• How do you currently track work orders?

• How does your team prioritize work orders?

• How are you measuring and evaluating your department's efficiency?

• Are you looking for a cloud-based or on-premise software solution?

STEP 2: VENDOR EVALUATION

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Vendor Evaluation

To ensure you find the right fit for your needs, become familiar with the various features most FM systems offer.

The key questions provided in this guide will assist you in your evaluation process. Use them to guarantee that you're fully educated on the offerings of each product you evaluate.

When it comes to the in-person evaluation process, be wary of companies that do not offer live demos. Live demos are crucial as they give you a feel for the product's speed, user-friendliness, and overall capabilities. If the salesperson uses still images, instead of demonstrating workflows in real time in the program, this is a red flag. It may be a sign that the software is not reliable enough for the salesperson to feel comfortable using it during the demo, which does not bode well for you.

MODULES

Here are the typical modules a well-equipped FM software solution should offer. When you're comparing FM software, be aware of the application's usefulness versus its complexity. Modules should be simple to use but still have the flexibility to meet your specific needs. If your workflow includes processes outside of the modules offered, ask vendors if they accommodate and create customized modules for customers. A thorough evaluation process requires participation in a combination of free trials and live demonstrations. By fully experiencing the FM software in this way you'll feel more confident in your final decision.

Work Order Management

This is a basic function every FM software system should have. The ideal choice will have a workflow that makes creating, responding to, assigning, tracking, and resolving work orders a simple task for users of all skill levels. It should also be capable of tracking the cost of work orders and the time spent on them. Most solutions will give organizations the option for staff to submit their requests via email in addition to entering them directly into the software. This simple and familiar way of submitting requests makes it easier for users to adapt to your chosen solution.

Preventive Maintenance Scheduling

This is a vital module that helps eliminate unplanned downtime and unnecessary expense. The ideal software should automatically issue reminders for scheduled preventive maintenance tasks.

Event Scheduling

If rooms and resources in your facilities are booked for events, this feature is a must-have. FM software should ensure event success by eliminating the double-booking of rooms and resources and enabling flexible approval processes.

Inventory and Asset Management

Tracking inventory and assets can be a simple task with the help of FM software and doing so should allow for inventory items to be linked to corresponding work orders.
A feature in high demand that streamlines inventory tracking is the QR code creator. Having a unique QR code for each asset saves time as you can access asset information in the field. Scan codes from any smartphone or tablet to adjust inventory quantities and obtain asset maintenance procedures and history.

Technology Ticketing

A good FM software system can make tracking technology asset information and historical ticket data quick and easy. Your software solution is meant to save you time so make sure yours is capable of keeping requesters in the loop regarding the status of their tickets by sending automatic notifications.

Purchase Order Management

This feature should simplify the purchasing of equipment and inventory by allowing you to create and approve purchases while tracking received shipments.

Transportation Scheduling

This feature should allow you to assign drivers and vehicles to ensure proper staffing for trips while keeping track of vehicle maintenance and repair costs.

Key Questions ?

Does the system have all the modules needed to support our operations?

Does the system have the ability to turn modules on and off based on our needs and changes in our operations?

If the system doesn't quite contain our ideal modules, does it have the ability to create customized modules to better meet our needs?

Does the system have QR coding capabilities for assets and inventory?

Does the system track historical data for assets/equipment and work orders?

Does the system allow users to upload image and document attachments to work orders and events? Is there a limit to how many files or the size of files that can be uploaded?

INTERFACE

A well designed interface can be the difference between your new FM software becoming a success or a flop within your organization. It's important the solution you choose is capable of keeping your information organized and is easy enough for all your intended users to navigate. If your colleagues and staff don't feel comfortable using the software, chances are they'll be slow to warm up to it.

Key Questions ?

What filtering and searching options are supported in your interface? For example, can we filter our work orders or events by type, location, date, urgency, etc.?

Does your interface include a calendar view so we can see when events are occurring and work orders or preventive maintenance tasks are due? If so, does the calendar view support dragging and dropping items for easy rescheduling?

Can we export the information from the system to an external calendar like Google Calendar, Apple Calendar, or Microsoft Outlook?
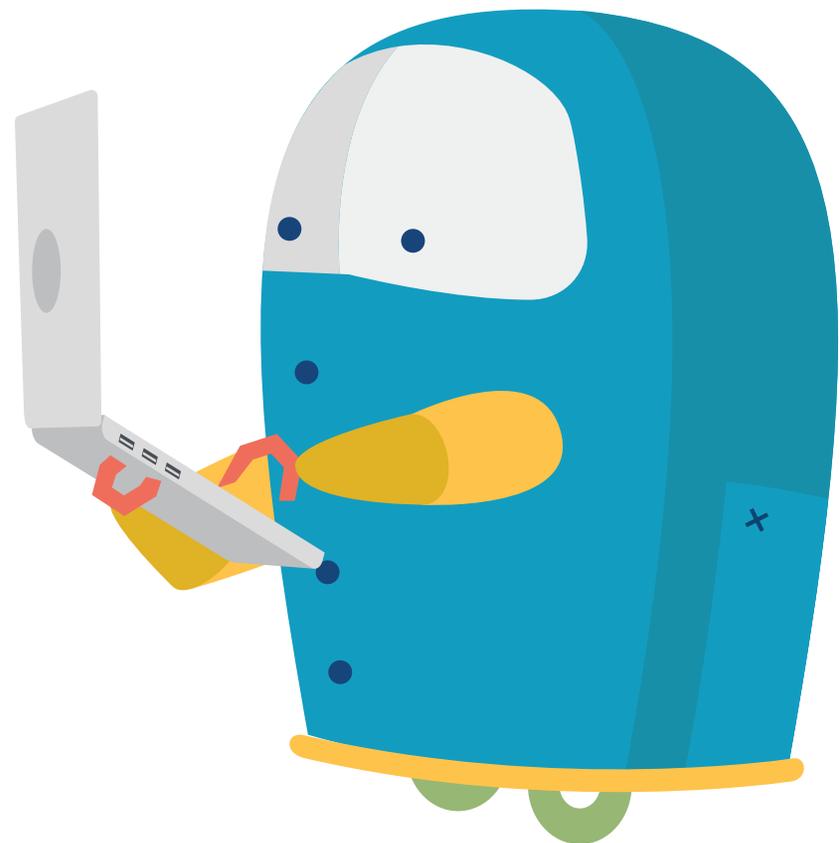
CUSTOM FIELD SUPPORT

Custom fields, also known as user-defined fields, are incredibly useful and allow for forms and other areas of the system to be tailored to meet the needs of your organization. For example, if your organization needs to document a vehicle's license plate number when storing it as an asset in the system, and your chosen system doesn't contain an out-of-the-box field to capture that information, make sure you have the ability to create a new customized field to track license plate numbers.

Key Questions ?

Does your system support the creation of custom fields/user-defined fields? If so, can we create custom fields in the system ourselves or does someone from your company have to create them for us?

What types of custom fields are supported in your system? (i.e., text boxes, drop-down lists, dates, attachments, HTML snippets, etc.)

Can custom fields be used when filtering, searching, or running reports in the system?

UNLIMITED USERS AND ROLE-BASED USER ACCESS

The ability to grant access to an unlimited number of users prevents bottlenecks in your workflow. Empowering more people to use your software solution improves communication and streamlines lengthy processes.

Key Questions ?

Do you offer unlimited users or do you charge per user?

How are user roles and permissions defined in the system? Can we add and configure user roles and permissions ourselves?

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REPORTING AND ANALYTICS

Don't just store your data, use it to extract insights into your operations. The ideal software will have robust, interactive analytics features, enabling you to identify your KPIs and view this data in a variety of charts and reports. Drilling down into reports and exporting the data to share with your team is also an important capability to consider. Some vendors will offer customizable reports that can be created specifically for your organization.

Key Questions ?

Does your system offer pre-built reports? If so, which reports are included?

Does your system offer interactive dashboards? If so, can the dashboards be customized?

Can we download the reports and dashboards in a variety of formats? (e.g., Microsoft Excel, PDF, etc.)

Can we share the reports and dashboards with other users or colleagues?

MOBILE ACCESS

Many issues can come up in a day that require you to address them in-person. An FM software system that does not allow mobile access hinders your efficiency. This feature keeps you up-to-date with your facilities anytime, anywhere, and without being chained to your desk.

Key Questions ?

Can the system be accessed from a mobile device? If so, which system functions can we perform on a mobile device?

SINGLE SIGN-ON CAPABILITIES

If you're looking to integrate your FM software with an on-premise active directory system or Google Apps, be sure to check that your solution has this capability so you can ensure your colleagues have a seamless login experience.

Key Questions ?

Which single sign-on options are supported with your system (e.g., Active Directory, Google Apps, etc.)?

What information is required from our IT department to configure the single sign-on integration with your system?

What user information can be synced with the single sign-on integration? (e.g., name, email, phone, role, etc.)

EMAIL/TEXT NOTIFICATIONS

A huge return on investment received from your FM software will be in the form of extra time for you and your team. Your FM software system should allow you to set up email and text notifications to alert users when they're assigned to a task, when the status of a work order or event changes, or when a work order is resolved.

Key Questions ?

Does your system send automatic email and/or text notifications to users?

Can users adjust their email preferences to select which events they want to be notified about?

Do the email notifications contain contextual information such as a description and link to the specific work order/event in the system?

Can we take action on a work order/event by replying to the email notification?

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CUSTOMER SUPPORT

When you purchase FM software, you're entering a partnership with that company. Before you take this leap, be positive that you will have adequate support if the need ever arises. Make sure you know what support options your solution offers. An ideal solution will have a resource library, a responsive support team, and unlimited customer support.

Key Questions ?

What forms of customer support do you offer? (e.g., phone, email, chat, etc.)

Is there a limited number of customer support hours included with the purchase of your system?

What types of software training do you offer for our users and is there a fee involved?

Will you assist us with importing users, facility/asset data, and historical data into the system? If so, what's involved in that process?

What sort of support documentation do you provide? (e.g., help articles, tutorial videos, manuals, etc.)

DATA OWNERSHIP

Data ownership may not be at the forefront of your mind during the evaluation process, but you'll wish it had been if you ever decide to change software. Some companies may keep your data, meaning it cannot be exported out of the system if you choose to use another service. Others might make the data export or transfer process very cumbersome. Get to know the data export processes your chosen solution offers in case you ever need to export your data.

Key Questions

Do we own the data we enter into the system?

Can we export our data from the system in a usable format (i.e., a spreadsheet)?

How long would we have access to export our data out of the system if we are no longer a customer?

SOFTWARE DEVELOPMENT

The facilities management industry is ever changing—you need software that can keep up. Choose a solution with a positive track record for updating and improving their software.

Key Questions

How many major and minor updates and enhancements do you release in a year and what is your process for deploying them to your users?

How do you incorporate customer feedback into your software updates?

What security measures are in place to ensure that the system is safe?

How do you make sure that our data is not lost and that the system remains online?

PRICING

Pricing varies among software companies and it pays to ask as many questions as necessary so you fully understand what you're paying for. Some companies will increase annual costs at the end of each subscription term, this is called uplift. Become familiar with each vendor's process so you don't get caught off guard.
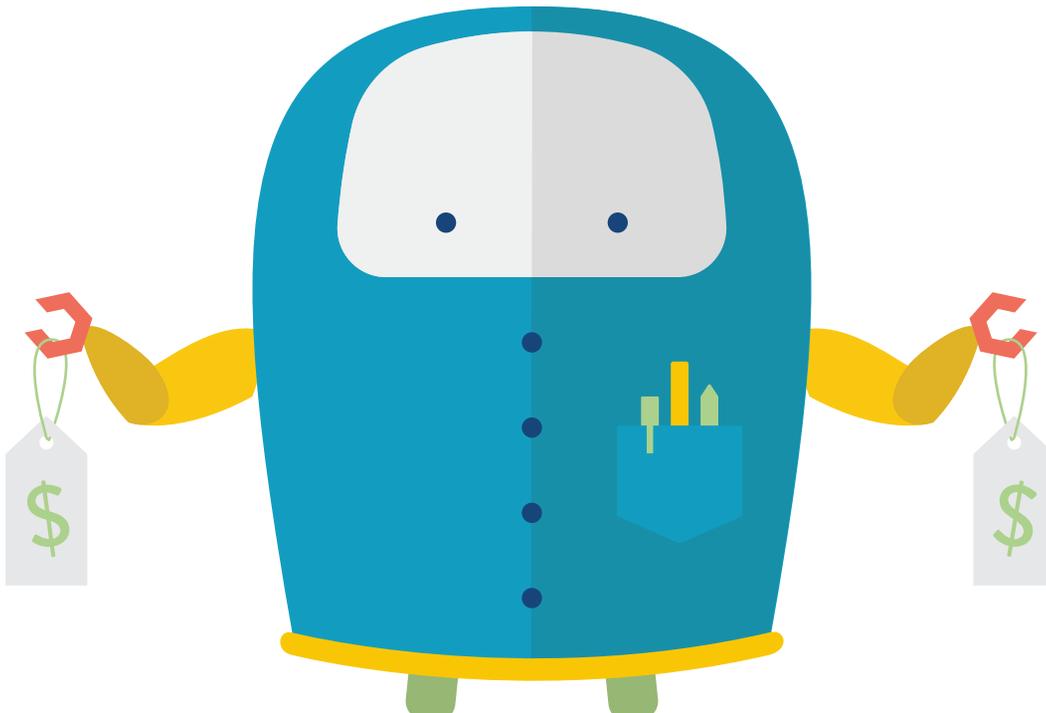
Key Questions ?

How much does the system cost?

How is the cost determined? Which factors would change the cost over time?

What payment options and frequency are available?

Is there an annual uplift in the cost? If so, what is the amount?

Keep track of your research with our free Fm Software Evaluation Matrix.

To further simplify your search, we've developed an easy-to-use Facilities Management Software Evaluation Matrix. This optimized excel spreadsheet will help you organize your research and keep your needs at the forefront, so you can be confident in your final decision.

By downloading the evaluation matrix, you'll be able to:

• Strengthen your vendor evaluation process by using our provided questions

• Track information from each vendor and view them side-by-side for easy comparison

• Use our built-in formula to score each vendor based on their software capabilities and the features you deem most important

DOWNLOAD THE MATRIX

Facilities Management eXpress

ABOUT FMX

Facilities Management eXpress is a cloud-based, facilities management software solution that enables facilities managers to more efficiently and effectively track work orders, schedule resources, and plan maintenance. The easy-to-use, highly-configurable solution features a calendar view that anyone can use to submit, track, and manage their requests, events, and assets. Facilities owners and managers gain visibility into activities and costs, while building staff and tenants get updated status information on their facilities requests.

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