



# 8 Questions to ask when looking to deploy a CAFM system





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# Computer Aided Facilities Management

Whether it's a set of corporate offices, a sprawling university campus or multiple retail warehouses, a company's land, buildings and maintenance often account for a significant proportion of its outgoings. Overseeing the management of these facilities spread across multiple buildings and locations can be a complex task. It's more than coordinating repairs, cleaning and security – facilities managers play an essential role in assuring safety, compliance, functionality and efficiency – to name a few.

The impact of the COVID-19 pandemic has also caused disruption to working practices, presenting new operational and compliance challenges. While many have been reliant on spreadsheets and manual, paper-based processes to keep track of tasks, as demands increase on facilities managers to do more with less, the inefficiencies and inaccuracies of using spreadsheets is clear. Technology is the fundamental layer that underpins business success and growth and is a crucial factor in facilities management

to optimise processes and help managers become more efficient.

For those looking to invest in a Computer Aided Facilities Management (CAFM) system, it can seem a daunting process at first. In this article, Esther Coleman, Product Manager, Idox, goes back to basics, covering some of the essential questions to ask during the process, as well as the invaluable benefits you can expect to unlock.



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# 1

## What is a CAFM system?



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**From planned and reactive maintenance to asset management, help desk assistance to room booking, CAFM can bring all aspects of estate management under one roof.**

A CAFM system is designed to incorporate multiple facilities management functions within one platform, to streamline the administration of these tasks and provide a single source of truth for a business. The collaborative nature of a CAFM system means that workflows can be optimised to ensure tasks are being completed in the most efficient, cost-effective and compliant manner possible.

Every business will have its own facilities management requirements. From planned and reactive maintenance to asset management, real-time reporting to room booking, CAFM can bring all aspects of estate management under one roof. In

today's digitally-enabled world, business operations that continue to rely on paper-based systems and spreadsheets will struggle to complete with those that embrace data-driven decision making and greater efficiency through technology.





When researching facilities management systems, it's likely that in addition to CAFM, you'll also come across CMMS (Computerised Maintenance Management System) and IWMS (Integrated Workplace Management System) – so how do these differ to CAFM?

#### CMMS

This system is designed purely for managing planned and reactive maintenance, tracking how often equipment is repaired, associated costs as well as labour resources. Ensuring assets are maintained, safe and compliant is the sole focus of a CMMS.

#### IWMS

IWMS is often described as a combination of CMMS and CAFM. In addition to supporting facilities managers to track equipment and optimise space, it goes beyond the remit of managing a physical environment of an estate, monitoring elements such as lease management and environmental impact.

But why should FM teams need to weigh up the differences in these systems to settle on just one? The nature of FM means that responsibilities are regularly changing and the needs of a business constantly growing and evolving. As such, they need a system that can flex and scale accordingly, with a comprehensive set of tools that can be customised to suit their requirements, no matter the size or sector. Deploying the most successful CAFM system will mean never having to decide between these complex acronyms.



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# 2

## Do I need a CAFM system?

If you're considering moving to a CAFM system, it's likely that you're experiencing a number of challenges when it comes to managing your estates such as:

- coordinating mobile asset and work management
- Gathering, storing, accessing and interpreting facilities data
- Asset management
- Demonstrating compliance
- Generating data-driven management reports
- Automation of routine tasks
- Cost control
- Administrative burden
- Management efficiency
- Health & safety

The use of spreadsheets to organise teams and operations may seem like a straightforward approach to combating these challenges – familiar software, no need for training, lack of license and support costs – but in actual fact, spreadsheets can end up costing an organisation in many other ways including time, inefficiency, inaccuracy and non-compliance.





**The reality is that the use of spreadsheets in facilities management significantly increases risk. With potentially multiple different people updating different spreadsheets and disparate systems, there is a high likelihood of data loss or the wrong data being entered into the wrong place.**

Unlike a CAFM system, spreadsheets do not provide a single source of truth where you can consolidate all data, communications, documents and other crucial information in one place. Without this central hub, a high proportion of time is wasted on searching through emails and folders and working out the current status, instead of concentrating on the task at hand.

Budget and efficiency challenges highlight the need for FM teams to be data driven. But while information can be inputted

into Excel to list assets and identify when maintenance should take place, for example, it cannot set up maintenance schedules and automatically notify the correct team to carry out the work. Spreadsheets lack the meaningful format that can provide FM teams with the necessary insight and automation to oversee and manage such a complex estate.



**Spreadsheets can end up costing an organisation in many other ways including time, inefficiency, inaccuracy and non-compliance.**







# 3

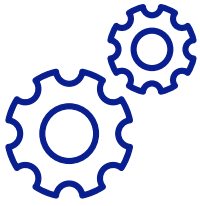
## What are the benefits of a CAFM system?

CAFM provides a system whereby the recording, tracking and management of logistical tasks can be digitised to create efficiency, save money, demonstrate compliance and generate added insight to inform decision making.

Even a relatively small estate can be a complex environment to manage when you consider some of the required tasks, including:

- Planned and reactive maintenance
- Health and safety compliance
- Managing financial and physical resources
- Asset management
- Room booking and occupancy management
- Mobile workforce management
- Monitoring sustainability factors





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As such, in order to effectively manage such a number of responsibilities, FM teams require intuitive software that streamlines and consolidates these numerous tasks into one centralised dashboard.

Compared to a traditionally manual process of using disparate systems including email, shared drives and spreadsheets, there are numerous benefits to be achieved:

#### **Enhanced planning**

CAFM provides a streamlined and reliable method to manage reactive and planned maintenance across an estate. With automated alerts and scheduled reports, maintenance tasks can't be missed and a complete audit trail provides peace of mind for compliance requirements. Centralised document management means more informed decisions can be taken, faster.

#### **Increased visibility**

With use of a CAFM system, FM teams can instantly acquire complete visibility of all facilities tasks, costs, assets and contractors from one dashboard, instead of trying to filter through mass amounts of documentation across multiple disparate systems each time.

#### **Simple integration**

Integration of the CAFM system with wider parts of the business is crucial and can enable a far more streamlined process when it comes to room booking, for example. This supports the optimisation of meeting room provision, as well as providing insight for expansion or reduction.

#### **Data access anywhere, anytime**

A cloud-based CAFM solution means users can log on in any location – and gain real-time access to work orders and assets. With an optimum user experience, admin time is reduced, engineers have access to up-to-date information to support their role and overall pressure on FM teams is reduced, as the system helps to manage, mitigate and assess risks as they arise.

Without the support of an innovative CAFM system, organisations will potentially lack vital business insight that could help them to save on costs, create invaluable efficiencies and enhance service delivery across their estate.



A person wearing a blue and white plaid shirt and jeans is carrying a large, black, heavy-duty toolbox. The person's arm is visible, and they are wearing a white glove on their hand. The toolbox is black with silver latches and a handle. The background is white.

# 4

## What resource is required to deploy a CAFM system?

One hurdle that can typically challenge FMs when embarking on a CAFM system implementation is thinking they need to immediately create a list of every single task and function they want to hand over to the new software. While this will certainly be the end goal, this list will quickly reveal what appears to be a tall order of asset lists, work order groups and other functions that can seem overwhelming at first.

While these reference points will need to be collected, actually, the CAFM system can be implemented without having this data immediately to hand. Instead of spending time collecting the entire asset lists (by which time it's complete, the assets could have changed again), you can get the system live, start raising the planned

maintenance work orders and then begin loading the assets as they come. You can begin enjoying the benefits of the system with a minimal amount of information – you don't have to collect every piece of data just to get the system to start.



**Taking an iterative approach to deployment, particularly with a vendor that provides access to all modules with no additional fees, means that you can focus on the core value to the business – whether that’s demonstrating compliance or generating management reports – with the knowledge that you can continue to unlock further value through expanding use of the solution without incurring extra costs.**

For example, a high majority of companies instructed employees to work from home at the start of the pandemic and are now looking to adopt a hybrid approach with hot-desking. Those with a CAFM system may have never had need to use a desk booking module before, but had a sudden need for it in 2020 and were able to benefit from an additional extra value stream that was immediately available to them. Room booking is proving to be an increasingly important requirement for FMs, enabling

them to completely redesign work spaces to allow for social distancing, one-way routes and add in breakout areas that they may not have previously needed. With the tools and insight provided by a CAFM system, any spare square footage can be optimised or re-allocated to provide value to the business. Many businesses are taking the opportunity to re-imagine the workplace for the better – a CAFM system can be the software that provides the foundations to deliver those changes.



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# 5

## How can CAFM help with compliance?

Protecting the health and safety of staff and customers is high on the agenda of every organisation. Not only is this a moral obligation, but failure to keep on top of health and safety regulations can expose businesses to significant fines and subsequent reputation damage.

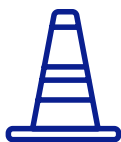
Below are three areas where CAFM can support in the area of compliance:

### Lone workers

With the impact of the pandemic, many organisations have been under pressure not just to transform roles to keep employees safe, but also cut costs. As a result, many roles that previously required two employees have been adapted for a single worker, thereby significantly increasing the number of lone workers that a company

employs. Without colleague supervision, how can you ensure the safety of lone workers? Equally, how can you maintain or improve productivity levels with a dispersed workforce operating independently? It's paramount that organisations can keep a comprehensive audit trail of risk assessments and that every worker has the tools and processes required to keep them safe, or else the business risks facing severe financial penalties.





**In the event of a health and safety incident on site, can you provide clear evidence that you maintained the related equipment or machinery in line with guidelines?**

### **Document and policy management**

With the scope of FM responsibilities spread across an entire estate, the high volume of policies, regulations and subsequent documentation comes hand in hand. Though workers and contractors might be working in many separate locations, they still require access to the right resources to perform their roles in a compliant fashion. Information such as planning permission, processes, schedules, financials and building regulations must be readily accessible and organised, not only to remain compliant but also enable workers to become more efficient and use their time on the role they are employed for – not endlessly searching for documentation spread across multiple locations.

### **Training**

Depending on the sector and task required, there will be times when workers must be trained to a certain standard to carry out the role. Within the CAFM system, check lists can be set up for jobs so that users can confirm they meet the qualification level and particular jobs, whether reactive or planned, can be assigned to specific ‘trades’ accordingly. Moreover, documents can be allocated expiry dates with warnings ahead of time, so businesses can ensure that any required worker training doesn’t unexpectedly lapse.

### **Tracking required tasks**

No matter what type of business your organisation conducts, there will be certain protocols that must be adhered to for compliance purposes. Tasks such as routine inspections of equipment, maintenance, checking fire extinguishers, cleaning air conditioning systems, fire drills must all be completed in a timely manner. Yet so many tasks can be tricky to stay on top of, and can be quickly overlooked without a management process in place.

Even if you choose to outsource certain tasks to a third-party contractor, the liability still remains with your business. CAFM software, therefore, offers a form of insurance. In the event of a health and safety incident on site, can you provide clear evidence that you maintained the related equipment or machinery in line with guidelines? How easily can you access that information and share it with the regulatory official who is looking to audit your processes and documentation? You can never completely mitigate human error, but with a system that puts controls and measures in place that enables you to demonstrate a clear and up to date audit trail, you can mitigate the risk of regulatory breach.

# 6

## How much will a CAFM system cost?

When considering investing in any software, one of the most important elements is the cost. Clearly this is a crucial factor in the purchasing decision, but in the case of a CAFM system the focus should primarily be on the end result and subsequent return on investment. Ensuring value for money and that the solution is future proof and flexible to adapt for your business needs means looking beyond the initial purchase cost.



**An ideal CAFM system will evolve and scale seamlessly in line with your business needs.**

Not all CAFM systems are the same, and neither are the FM requirements of one business to the next. It's therefore imperative to look into the detail of the long-term cost, such as enquiring whether there are charges for additional modules or upgrades, or hidden costs for implementation? Will the vendor tailor the product to your needs and is that included in the cost? You don't want be stung with having to pay for unexpected elements, or spend time configuring the system yourself.

An ideal CAFM system will evolve and scale seamlessly in line with your business needs.

The most successful CAFM integration will be the result of a strong partnership with a vendor that enables you to capitalise on a proactive approach to managing your estate. In addition to the system functionality, seamless integration and flexibility, the experience and reputation of the vendor can be the difference in ensuring you have the support and guidance on hand to achieve your FM goals.



# 7

## What should you look for in a CAFM provider?



It's important to find out answers to questions such as how will the vendor manage ongoing product development? Will this be informed by regular customer feedback?

When it comes to a CAFM integration, there is not one model that fits all – each estate will have different set-ups, challenges and requirements. As such, CAFM software should provide versatility, not just in the product in terms of its functionality and integration with current systems, but also from the provider.

A vendor must have well-rounded experience across a number of sectors to ensure a high level of support backed up by a broad track record of knowledge and expertise that suits a wide variety of sectors.

Your needs as a business will evolve as the relationship continues, so it's crucial that collaboration is high on the agenda. It's important to find out answers to questions such as how will the vendor manage

ongoing product development? Will this be informed by regular customer feedback? Will they host routine user groups to gather input and feedback? Elements such as this demonstrate how much the vendor prioritises customer collaboration and make certain that your voice is heard.

Workforce mobilisation is another crucial component of a CAFM system. Being able to access functionality such as the help-desk and reporting systems out in the field means

that staff and contractors can manage their own workload and report back in a timely and efficient manner – all essential in keeping the business moving. Even if remote working functionality isn't something you're considering right away, the right CAFM system should have this element at its core, ready to be rolled out as soon as it's required.



# 8

## How can CAFM support sustainability goals?

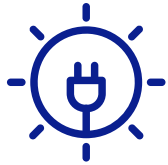
Sustainability is high on the agenda for the majority of organisations. From climate change agreements (CCAs) to legislation which aims to guarantee an end to the UK's contribution to global warming by 2050, the UK government is taking steps to enforce sustainability among industries and promote environmentally friendly practices.

Technology will play a pivotal role in supporting businesses in their sustainability efforts. As organisations look to monitor energy efficiency of their estates and reduce waste, it's clear that much of the responsibility falls to facilities managers – especially as the way in which many buildings are used has now fundamentally changed with remote working. CAFM technology has the potential to streamline processes within organisations and enable increased insight as to where emissions can be reduced.

One element that's central to this is the need for data to be centralised, so that FM's are empowered to make more informed decisions which will ultimately benefit their business – and, in turn, the planet. So how can CAFM software support businesses in their sustainability goals?







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### **Optimising office space**

- With enhanced strategic oversight of facilities enabled by CAFM, FMs can benefit from a smart response to fluctuating energy and occupancy levels. Through the use of sensors, it's clear which rooms in an office are in use and therefore require heating and lighting, instead of wasting resources on unused areas. With a more efficient use of space informed by additional insight into usage patterns, FMs can redesign office spaces accordingly, potentially mothballing certain unused areas to reduce energy consumption.
- Sensors can also be used for environmental monitoring, enabling buildings to monitor pollution and air quality and provide a holistic picture of air quality levels across regions.
- An innovative use of unused outside space is re-purposing it as oxygen-emitting ecosystems to offset carbon emissions. These garden areas are proving particularly popular in densely populated urban areas to help reduce levels of carbon.

### **Streamlined estate management**

FM can oversee vast estates with multiple buildings across numerous sites, which can create complexities when managing a dispersed mobile workforce. CAFM can streamline this process to send workers where and when they are needed, for example, ensuring the person who is nearest to the location and has the right equipment is sent to resolve the issue, rather than someone that has to travel from further away.

### **Prolonging asset life cycles**

Every asset has a particular life cycle, prolonged by regular servicing to keep it running at an optimum level. Certain assets will require more attention than others but at some point, the cost and emissions required to keep an asset going are no longer in the company's best interest. Planned Preventative Maintenance (PPM) via a CAFM system can support this analysis, identifying which assets are working smoothly and don't require servicing (and those that do), thereby helping to reduce the level of reactive maintenance jobs and freeing up FMs for more valuable tasks.







Call us on 0333 011 1200 or email [marketing@idoxgroup.com](mailto:marketing@idoxgroup.com) to find out more about Idox's facility management software, CAFM Explorer®.