A Buyer's Guide to Facility Management Software

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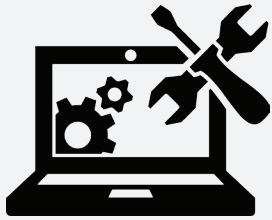
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A company's real estate and facilities portfolio serves as the second largest expense behind its people. Finding the right software solution to manage an organization's facilities can provide a significant return on investment, helping organizations improve efficiency and reduce costs – all while driving profitability.

The facility management software market features a number of solutions and providers, each with their own strengths and offerings. The most common solution in today's market includes a computerized maintenance management system (CMMS). These may be offered as a point solution or as part of a broader suite of software that automate the management of the entire real estate management lifecycle. When it comes to purchasing facility management software, there are a few things to consider throughout the process.

What is a CMMS?

A computerized maintenance management system (CMMS) helps improve maintenance operations and improve visibility. CMMS solutions centralize all data related to building operations and automate maintenance requests.

1. True cloud technology

In the facility management software market, companies offer the software in three primary methods:

- On-premises: On-premises software requires hardware and supporting infrastructure in order for the organization to host it from their location. Oftentimes, these software solutions are more customized per the customer, which makes it difficult and expensive to upgrade to newer releases.

- Web-based: Web-based software serves as a mix between on-premises and true cloud software. This type of application can be accessed via web browser, but it does require that files are stored on location. Because of this, the device must be configured to access the application in order for it to be web-accessible.

- True cloud: True cloud software, which may also be referred to as Software as a Service (SaaS), means that it can be accessed from any Internet-enabled device by using a compatible web browser. No hardware, server or data support is needed. In addition, upgrades are pushed to the software on a regular basis – requiring no work from the client's end or further investment.

More companies are relying on the cloud for their software solutions; in fact, research shows that the global market for the cloud is expected to reach $79.1 billion globally by 2018.[1]

Because of the nature of facility management, a true cloud solution provides the infrastructure most companies and facility departments need. It can easily be accessed from various locations without requiring servers and hardware. In addition, cloud software features native mobile functionality, which means it's designed to be accessed on the go.

Key questions:

- [If on-premises] What is the organization's commitment to maintaining the product?
- How often does the software receive upgrades?
- Do I have to purchase any hardware or services to ensure functionality of the software?
- Where is my data stored?
- Is there a security certification for the application?
- How much will it cost to upgrade the software?

1 January 29, 2014, Forbes

2. Mobile capabilities

Forty percent of the world's workforce will be mobile by 2016, according to Gartner.[1] Because of the nature of the responsibilities, facility departments are seeing mobile as an essential component of their day-to-day work. A solid facility management solution should have a strong mobile component to it.

Device-agnostic mobile capabilities are preferred, particularly if team members use their own devices to access the data. Because of this, it's ideal to be able to allow users to access the software solution via web browser as well as with a mobile app. Having a program that can be accessed from any browser, on any device, opens up mobile to a broader audience than relying on a mobile app, which may only be compatible with specific operating systems or types of devices.

There are differences among mobile applications. Some only operate with access to data networks or WiFi, while others operate offline – which may be more preferred for technicians that work in areas of the building that frequently do not receive data reception or have access to networks.

Evaluate the mobile capabilities of the software solution, as many CMMS solutions only offer a subset of functionality in its respective mobile app. It may be used to submit or process a work order, but cannot pull up any reports. If the software solution doesn't have native mobile functionality and can only be accessed via a mobile app, it can make it more difficult for technicians to use while on the go.

Key questions:
- Can the application be accessed from a web browser on a mobile device?
- Does the mobile app operate online and/or offline?
- What functionality can be accessed via the mobile app?
- How are upgrades received for the mobile app? Does it require additional investment?
- Who are the primary users of the mobile app?
- How much does the mobile application cost?

1 November 6, 2012, Gartner

3. Users

Most software providers will base their pricing on either the total number of square feet that it will manage or the total number of users to access. For on-premises software solutions, it requires the organization to purchase separate licenses for each user. These licenses may include different access rights and functionality to meet the needs of different stakeholders within the organization.

Pricing based on square footage will leave it open for the number of users for the CMMS; many facility management software providers allow unlimited users. This method of pricing ensures that access is given to all key stakeholders, including any vendors that provide support to maintenance activities.

Some organizations are able to provide limited access to all its employees. This ensures that issues are reported immediately and in a consistent manner. In addition, it can give management access to real-time reports without taking a facility team member away from their core job responsibilities to pull the data.

If a software provider offers unlimited user functionality, it's important to understand how they manage security and access. A person who only accesses the system to submit a request doesn't need insight into the full schedule of work order requests. Similarly, a technician doesn't need visibility into his coworker's timecard data. Knowing how this information is stored and accessed can easily differentiate solutions from each other.

Key questions:
- How many users are included within the price of the software?
- If we need to add more users, what's the additional cost per user?
- What are the various "levels" of access for users?
- Is it possible to customize the functionality that users can access?
- How are security rights established and changed?

4. Depth in functionality

Not all facility management software solutions are created equal. There are facility management software solutions that simply serve as tracking mechanisms for reactive work order requests. It doesn't store any data, nor does it allow any insight into assets and their performance.

On the other hand, there are other software solutions that provide more extensive capabilities to ensure visibility into all facility operations. This may include tracking reactive work order requests, scheduling and managing preventive work order requests, managing the entire asset lifecycle, tracking resource use and reporting on all parameters. There may be additional modules that can be added to manage vendor relationships and performance, or enhance financial tracking.

For organizations that are moving from a paper-based or manual system to an automated CMMS, core functionality often includes:

- **Maintenance management:** Maintenance management can refer to managing reactive work order requests or preventive maintenance, or a combination of both. The most advanced solutions will enable management of both reactive and preventive, as well as linking the two for a comprehensive maintenance management solution.

- **Asset tracking and management:** Asset tracking includes essential location data unique to an organization, such as which floor or room the asset may be located. Tracking also includes essential details like manufacturer, warranty details, purchase date and recent maintenance requests. More advanced solutions will offer complete asset lifecycle management to track all details from procurement to decommissioning. These solutions provide insight into key asset maintenance decisions like replace vs. repair.

- **Vendor management:** Beyond providing system access to vendors, CMMS solutions may also enable vendor management, including tracking key information like certificates of insurance and activity history. There may be functionality to create a rating system, allowing stakeholders to complete performance surveys to develop a preferred vendor list.

What works for you?

There are hundreds of CMMS solutions on the market. Understanding the differences in functionality will help you narrow your search and uncover the best solution for your needs.

- **Resource allocation:** Understanding use of time and money can help organizations make smarter decisions with their budgets. Advanced CMMS solutions may have separate modules to track employee time, as well as cost details as they complete work orders.

- **Reporting:** CMMS solutions provide visibility into operations, which can highlight key gaps and areas for improvement. Reports may be as simple as pulling a list of work orders completed in a timeframe, or as dynamic as assessing cost leakages. Reporting functionality can be available within the application or may be accessed through a third-party that integrates with the solution.

Additional functionality that software providers may also offer include:
- **Financial management:** Go beyond ad-hoc tracking of data within the solution and leverage modules to streamline tracking. In addition, financial management tools may include integrations with financial systems of record to easily share data with other departments for accounting purposes.

- **Incident and event tracking:** The facility management team is often in charge of tracking issues related to safety. Incident and event tracking module offers an opportunity to track any incidents that occur on-site and automatically issue any work orders that may be needed to fix the issue, such as broken glass in an area.

- **Emergency planning:** Depending on the structure of the organization, the facility management team may be in charge of emergency planning. Leveraging a module as part of the CMMS solution, it can ensure that emergency plans and business continuity models are stored in a central location for key stakeholders to access when needed.

- **Visitor/security:** Some organizations have multiple locations with numerous vendors coming and going. Modules focused on visitor and security simplify the registration process and provides a single source to track all data related to building entry.

Data security also serves as an important component of functionality for many facility teams. This should be a key component of the evaluation process to ensure that the software provider meets security guidelines. True cloud solutions will often have security certifications.

Prior to starting a search for facility management software, the organization should determine which functionality is most important to them.

Create a list of "must have" functionality, complemented by a list of "nice to have" features. That way, the search focuses on software solutions with similar capabilities and, likely, a similar price range. Otherwise, it's easy to fall into a trap of going for the cheapest solution, even if it doesn't have the baseline functionality to support the needs of the organization.

A CMMS wish list

Create a wish list that includes ideal functionality. Prioritize based on what the team cannot operate without and evaluate potential vendors based on that list to find the best solution for the organization.

5. Reporting

Gaining visibility into the operations of the facility team can provide a number of benefits, including:

- Reducing maintenance costs
- Increasing operational efficiency
- Improving internal customer communication
- Streamlining vendor management processes
- Reducing organizational risk

A CMMS should offer comprehensive reporting to gain insight into the performance and operations of the facility team. This reporting can provide visibility on a variety of levels.

Simple data points, such as the hours that each team member records on a daily basis, can help management with staffing decisions. More complex data points, such as the cost and number of breakdowns for particular assets, can be leveraged for decisions like whether to replace an asset due to performance issues.

In evaluating the reporting functionality of a solution, it's important to think about what types of reports are critical to the organization. Each organization has different metrics to track, and these should easily be done through reporting.

Key questions:

- Does the solution offer in-app reporting?
- How much does it cost to add reporting to the solution?
- What types of reports can be pulled?
- Is there an opportunity to customize reports?
- When extracting reports, what types of files are created (.csv, .xls, .pdf, etc.)?

6. Implementations

After purchasing the software, it can be used out of the box – meaning it has no data in it and the key users of the solution don't receive any training. Most software providers will offer implementation or services to add data and train stakeholders on how to best use the system. Training can ensure user adoption within the organization, as people are more likely to use software if they are familiar with the functionality.

The pricing for implementations can vary by vendor, based on the services that they offer. In addition, some vendors may provide pricing for a base-level package but charge by the hour, meaning that the cost can end up much higher than anticipated.

In addition to considering the services and associated pricing, it's also important to understand the experience of the team implementing the software. Some software providers will work with third-party organizations. These organizations implement several different types of software, and are not as experienced with one particular solution.

On the other hand, other software providers will have an in-house professional services team completely focused on implementing the solution. As a result, they may have a better understanding of different use cases on the software and know how to meet the dynamic needs of each client.

Determining the right implementation approach for an organization depends on its use case and individual needs. Learn the differences between implementation packages and know exactly what is included in each, particularly if there is a large variance in pricing between vendors.

Key questions:

- What services are included with the implementation package?
- How much does it cost? Is it a flat rate or does it vary based on the number of hours it takes to implement?
- How long does implementation take?
- What is the experience of the team that will implement the software?
- What are future training opportunities that are available for my team? How much does that cost?

7. Software functionality updates and upgrades

Technology changes at a rapid rate, and as a result, software needs to evolve just as quickly to ensure it's providing the best value to the organization. It's important to understand how the vendor rolls out software updates and upgrades.

As noted earlier, on-premise software solutions require an investment from the organization prior to rolling out the software update and upgrade. Because these solutions are often highly customized, the time it takes to update each piece within the system to upgrade can cause a great deal of pain.

True cloud solutions keep upgrading simple as the software provider does all the work. The updates are often pushed out on a monthly basis after the software provider conducts extensive internal testing on the solution. As a result, all users are on the latest version of the software, which ensures the best functionality and highest security. As an added bonus, users are not required to pay extra for the updates – they are already included as part of the subscription price.

For true cloud solutions, upgrades are handled in a similar fashion – although they are not rolled out as frequent as monthly updates. These upgrades may include more in-depth changes to functionality, such as adding a new module or transforming a workflow.

Key questions:

- How often does the company release software updates?
- How long does it take to roll out new updates (if on-premises software)
- How does the company fix and repair bugs?
- Does the software provider allow customization?
- How much does it cost for updates and upgrades?

8. Future product state

As an organization grows and changes, so does their needs for facility management. The facility team grows with an organization and adapts to changes that may occur, such as regional or international spread.

Because of this, it's important to consider the future of the CMMS solution. While it may fit the needs of the organization today, how will that change as the company grows and shifts? Finding a solution that can scale with the organization's needs can ensure that the return on investment continues to grow at an exponential rate.

Also consider what the relationship will look like with the software provider. Is it simply a transaction, or is there an opportunity to grow a partnership?

Many software providers offer additional solutions beyond CMMS to meet the demands of managing the entire real estate lifecycle. This may include space and occupancy management, lease administration, project management or capital planning. Knowing the software provider's vision for the future and whether it's in line with the organization can help make a decision that enables the growth of a long-term partnership.

Key questions:
- What is the company's vision for the next five, 10, 15 years?
- How will the needs of facility management teams change in the next decade?
- How is the software solution adapting to the changing needs of facility management teams?
- What other software solutions are available? How will these change in the next five years?
- What are key focus areas for the product development team?

In Summary

The facility management software market features numerous vendors, varying from those that are simple in nature to those that are more complex and adept to grow with an organization.

Because of this, investing in facility management software requires an evaluation of the organization and its needs, as well as research into specific software vendors to understand how they can meet the unique needs of the organization.

It's also important to evaluate factors beyond today's functionality of the system. Understanding the software provider's vision for the future and how it will serve the organization can ensure the highest return on a software investment for years to come.

About Accruent

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