



Greater Orlando IFMA Chapter CFM Roundtable



Welcome to the 4th CFM roundtable

presented by

**The Greater Orlando IFMA Chapter,
AND**

Our first major sponsor

Workplace Resource of Central Florida

Special thanks to our host TAMI BERRY of SPRINT



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Today's facilitators:

Larry Simmons, CFM Manager of Facilities Services, City of Orlando
Treasurer, IFMA Orlando board of directors

John Mitrovka, CFM, IIDA

First Vice President, Florida Space Planning Manager – SunTrust Bank

Geoff Allen, CFM, President of IFMA Orlando

Office Services Manager - Glatting Jackson Kercher Anglin.



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In the first three roundtables we've reviewed important reasons to pursue the CFM designation, as well as the first 6 competencies. Today we will review the remaining 3 competencies:

- Quality assessment and innovation
- Technology
- Communication



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Quality assessment and innovation Overview

Consider your experience and knowledge base in these performances:

- ❖ What results are you currently achieving ?
- ❖ Why are you getting your current results ?
- ❖ How can you get the results you want ?



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Quality assessment and innovation Overview (cont)

SYSTEMS THINKING SIMPLIFIED –

An on-going business, or the perpetual process of providing fm services is cyclical, it circles round and round continuously. Systems thinking is hard because systems are non-linear, the image on the following page represents the cyclical nature of systems.



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Quality assessment and innovation Overview (cont)

- Starting with a definition of quality, the link between quality and customer service becomes apparent:
 - *We have found that like all important ideas, quality is very simple. So simple in fact, that it is difficult for people to understand. (Roger Hale, CEO, Tennat Company)*



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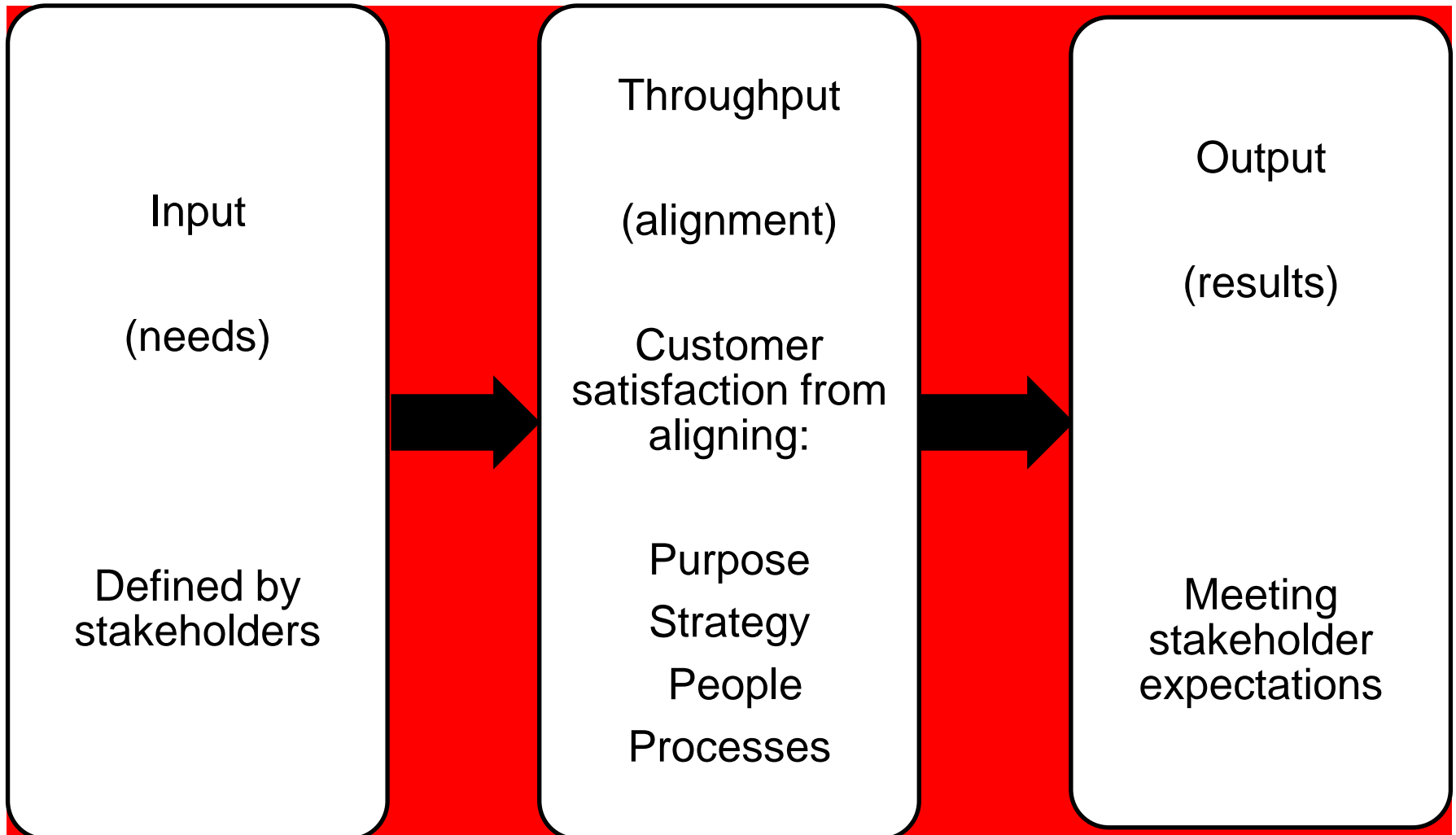
- Other quotes:

- *For Quality: Stamp out fires, automate, computerize, M.B.O., install merit pay, rank people, best efforts, zero defects. WRONG!!!! Missing ingredient: profound knowledge.*
- *Quality is about endlessly reducing the amount of special variation, so that the processes deliver their planned, **advertised output**.*
- *Quality starts in the boardroom.*
 - » (W. Edwards Deming, 1900-1993)



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SYSTEMS THINKING SIMPLIFIED





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Quality assessment and innovation - Overview (cont)

Identifying needs:

**Stakeholders – Facility users, fm employees,
Suppliers, Facility owners, Regulators**

Needs may be:

Financial – Revenue, income, cost reduction, roi

Interpersonal – Quality of relationships

Intellectual – Expansion and stimulation of the mind

Spiritual – Overriding values and purposes, legacy



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Quality assessment and innovation - Overview (cont)

Benchmarking FM data:

- Benchmarking is a process, benchmarks are industry standards
- Benchmarks can be descriptive (practices) or quantitative (performance measurements)

? Why are you getting your current results

Major approaches to discovering the causes of your results

1. The Deming approach (14 points & seven deadly diseases)
2. Six Sigma (look for deviation from the mean)
3. Japanese quality movements:

Lean Production (rather than mass, multi-skilled workers)

Kaizen (continued process improvement)

Gemba (on the line, day to day workers make it happen)



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Quality assessment and innovation (continued)

Additional considerations:

5 Why's

The Human factor

Customer retention

QMS (Quality Management System)

ISO 9000(1) (International Organization for Standardization)

Summary: The results you get are caused by the interaction of :

- How deeply you understand the needs of your stakeholders.
 - How well you integrate purpose, strategy, processes and people
 - How thoroughly you measure and report the results of processes and your whole system
-
- If we wish to meet the expectations of facility users and other stakeholders, we focus on sharing purpose and strategy, partnering with committed people and implementing effective processes. The well-aligned system then produces satisfaction for occupants, owners, staff, and managers.



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Questions for Assessment and innovation

1. Who are the facility managers customers
 - A. Other department managers
 - B. Staff and other employees
 - C. All building occupants
 - D. Executive management
2. What is the primary goal of benchmarking?
 - A. Networking with peers
 - B. Sharing ideas and issues
 - C. Improving operational performance
 - D. Developing management skills
3. What is the best way to assess the quality of services your department has been giving to occupants?
 - A. Informal conversations with occupants
 - B. Occupant surveys
 - C. Surveys completed after individual jobs are completed
 - D. If you receive complaints
4. Per uniform building code, what is the minimum width for a major exit corridor?
 - A. 3'8"
 - B. 5'0"
 - C. 6'0"
 - D. 7'6"



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Technology

Justifying and implementing technology initiatives

FM's who opt for technology solutions must be aware that future upgrades and enhancements could create compatibility problems. Senior management will be most interested in methods to save or avoid spending real dollars. Sooner or later all justifications involving new or upgraded technology boil down to cost.

- Some examples of justification used to demonstrate that technology initiatives will result in improved operations are:

- Improve reliability of service	- Reduce staff levels
- Increase efficiency	- Reduce costs
- Accelerate the pace of production	- Enhance support for decisions
- Improve accuracy	- Conserve energy
- Streamline work procedure	- Improve managerial productivity



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Technology (continued)

The six ways in which a necessary technology upgrade can be positioned are:

- The need to be more competitive
- Its linkage to specific business strategies
- The need to replace obsolete equipment
- The need to share accurate information quickly
- The need to increase support to employees
- The potential to increase profits

To position the necessary budget request for computers to process work orders and order equipment and materials, the method or methods of positioning you should use are:

- Linkage to specific business strategies
- The need to increase support to employees
- The need to share accurate information quickly

The four common reasons to delay implementation of new technology are:

- Wait for the best technology
- Wait for technology to mature
- Wait for prices to drop
- Wait until you can no longer afford to wait



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Technology (continued)

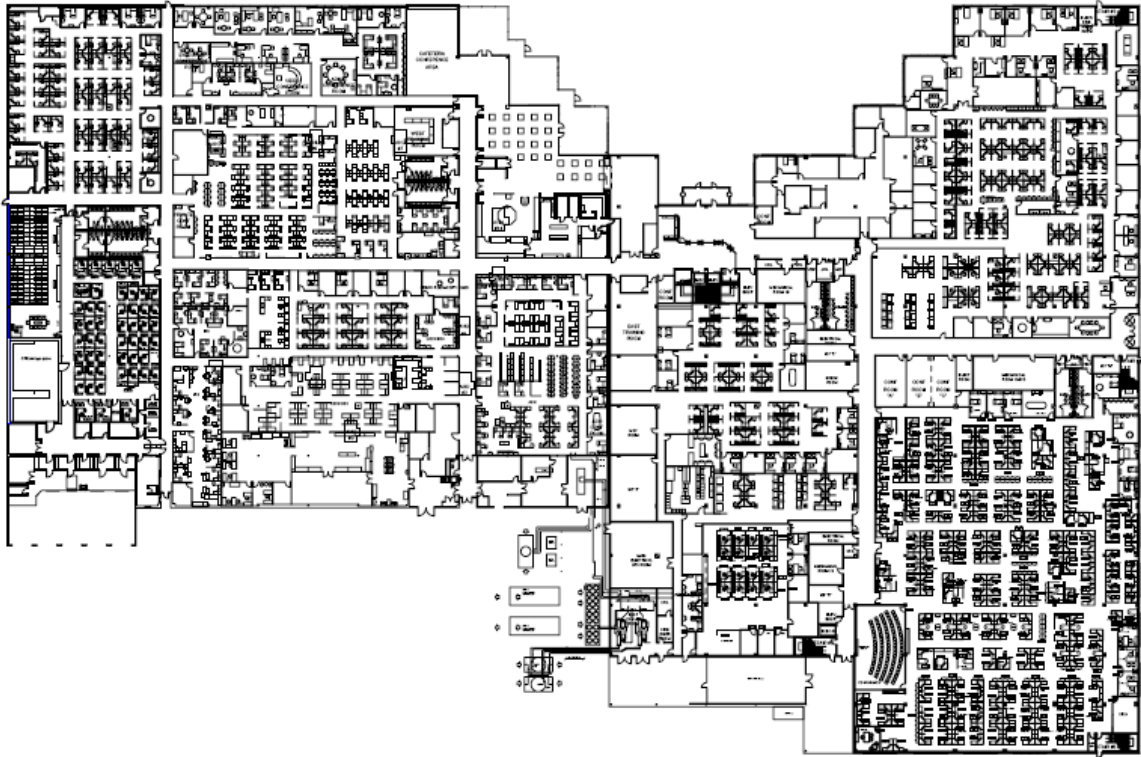
Common computer terms to be familiar with:

CPU – Rom – DRAM	Software applications
LAN's (local area networks)	Telecommunications systems
WLAN's (wireless local area networks)	Telephone systems
Operating systems – platforms	Network services
Emerging technologies	CAFM
Facilities technology	Automated building systems
Security technology	Technology intensive special space



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Technology (continued)



Property ID/Building:
Orlando Operations Center
Drawing ID:
FL00235-01-Design Plan

Date Printed: 09/27/2007 Date Revised: 07/30/07

SUNTRUST
Corporate Real Estate



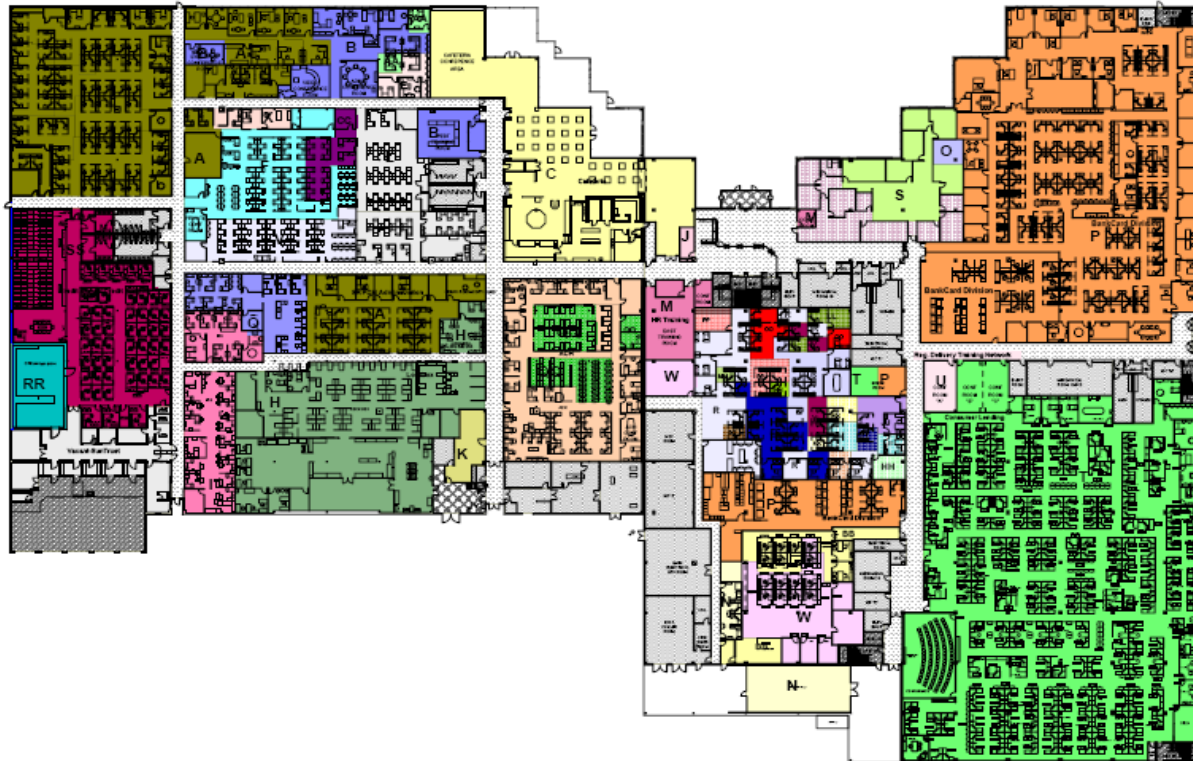
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Technology (continued)

Property ID/Building:
Orlando Operations Center
 Drawing ID:
FL00235-01-Design Plan

Date Printed: 09/07/2007 Date Revised: 07/30/07

SUNTRUST
 Corporate Real Estate



Building Space		Department Space	
<ul style="list-style-type: none"> Floor Area = 223,892 SF Non-Rentable Space = 12,281 SF Rentable Space = 8,754 SF Floor Catches Service = 10,388 SF 	<ul style="list-style-type: none"> Building Core Area = 877 SF Elevator Service = 0 SF Stairs = 0 SF 	<ul style="list-style-type: none"> IT Support Administration 10,632 SF ITS BANKING SERVICE MGMT 4,262 SF Call Center 15,343 SF ACT 4,424 SF Building Services Reporting 529 SF GENERAL PROCESSING 4,274 SF HR/Comp/Employee 2,583 SF IT Center 11,628 SF ITIS Compliance 2,761 SF Security Team (Sec. Admin) 189 SF Mail Services 785 SF Vendor Outreach 7,794 SF ITIS Training 1,088 SF Corporate Real Estate 2,218 SF HR Systems Training Admin. 263 SF BankCard Division 31,258 SF ITIS Database 2,222 SF Technology Infrastructure 4,363 SF HR/IS Relationship Mgmt 2,816 SF Contract Leasing 30,748 SF Reg. Delivery Training Network 589 SF LCR Outreach 1,088 SF ITC User Branch Services 2,862 SF Customer Services Admin. 792 SF Change Services Admin. 482 SF AA B/F Finance 349 SF IS/IT Branch Services 2,725 SF CC Asst. Controller 1,969 SF CO Systematics & Opt Admin. 207 SF IS Admin Services 1,534 SF IT Admin Support 785 SF CO Capacity & Performance Mgmt. 118 SF IT Software Database Admin. 275 SF IT Core/Database Services 493 SF IT Systems Mgmt. & Automation 580 SF IS Management & Storage Admin. 251 SF IT Service Mgmt. 355 SF MS Incident Mgmt. 82 SF NH CTO Value & Data Connectivity 97 SF CO Database Admin. 885 SF IT Infrastructure Software Products 129 SF CO TIME & MATERIALS TECH RESCAP 2,232 SF IS Power Mkt. COO Center/Trade 1,347 SF IS Credit Asset/Cash Support 8,830 SF 	



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Technology (continued)

Link Properties Current Allocation Report Property FL00235			
Run on: 9/7/2007 11:43:00 AM		Orlando Operations Center	
7465 Chancellor Drive	2007 Total Charges:	FL-OPS	
	\$0	Owned	
Orlando	Allocated SF 2007:		
FL 32829	1		
Space Manager:	2007 Rate:	Expected RBF	324,674
wcov65 - Stacy White	\$0.00	Calculated RBF	<u>323,629</u>
		Difference	-1,045
Occupants by Floor			
Co Cost Ctr	Department	USF	RBF
Floor 1			
0175 1054023	BIS Finance	349	417
0175 1054020	Systems/Network Ops Admin.	207	246
0175 1054040	Network Services	1,390	1,667
0175 1054044	IT/ Admin. Support	185	187
0175 1054046	Technology Infrastructure	4,383	5,255
0175 1054054	CTS-Branch Service	2,158	2,549
0175 1054133	SR ROW Administration	10,853	22,366
0175 1054210	BIS BANKING SERVICE MGMT	4,245	5,062
0175 1054301	LCR Processing	2,415	2,667
0175 1054336	DBRM Processing	4,216	5,056
0175 1054351	Acc. Certification	1,000	1,209
0175 1054355	Control Services Admin.	552	662
0175 1054790	Mail Services	725	845
0175 1055006	TM IMPLEMENTATION GROUP	2,232	2,676
0175 1055080	Online Solutions	2,322	2,746
0175 1055205	Mainframe & Midrange Admin.	381	452
0175 1055452	Online Database Solutions	463	560
0175 1055453	Mainframe Software Products	709	849
0175 1055463	System Mgmt. & Automation	580	695
0175 1055466	Capacity & Performance Mgmt.	116	139
0175 1055471	Software Solutions Admin.	275	329

0175 1057101	General Mgmt.	355	425								
0175 1057122	Incident Mgmt.	62	110								
0175 1057130	Banking Services Reporting	629	754								
0175 1057168	CTS Value & Data Connectivity	67	118								
0175 1057174	Distributed Admin.	885	767								
0175 1057300	CTS-Non Branch Services	3,962	4,753								
0175 1057367	Storage Solutions Admin.	482	582								
0175 1058635	ACH	6,424	7,720								
0175 1058636	Lockbox	11,628	13,650								
0175 1058615	IRB Compliance	3,701	4,440								
0175 1058600	Security Tech Ser. Admin.	184	220								
0175 2154330	Credit Admin/ Credit Support	8,883	10,634								
0175 2158140	Consumer Lending	28,735	42,680								
0175 2158150	President, COO Central Florida	1,847	1,678								
0175 3448370	BankCard Division	21,488	27,779								
0175 8203101	HR Training	1,520	1,666								
0175 8203102	HR-ORG Relationship Mgmt	2,810	3,271								
0175 8203156	HR-Occup Employment	2,893	3,075								
0175 8203241	HR-Systems Training Admin.	285	317								
0175 8203311	Reg. Delivery Training Network	580	705								
4444 4444444	Callcenter	10,340	12,407								
8888 8888888	Corporate Real Estate	2,278	2,732								
8888 8888888	Vacant-SunTrust	7,794	9,214								
Floor Total:		101,740	210,021								
Floor Gross	HR Service Admin	Arbitra	Remainder Service	Floor Common	Body Common	Shared	Unable	Core Factor	Blng Factor	Mod Date	Mod By
223,882	5,324	0	18,726	16,188	417	0	182,867	16.7%	0.7%	9/4/2007	U/M/2007



Greater Orlando IFMA Chapter CFM Roundtable Questions for Technology

1. In the development of a comprehensive automation strategy for a facility management organization, the final step of the process would be:
 - A. Performing a facility needs analysis
 - B. The establishment of automation goals
 - C. Development of an implementation plan
 - D. Education of the staff on automation

2. Using a CAFM as an inventory system for building equipment and personal property, the most important element of the module is:
 - A. Bar code readers and their software flexibility
 - B. Tracking tax basis and depreciation
 - C. Ability to issue requisitions for approval
 - D. Updating records is on a real time basis

3. Which of the following data collection areas can most benefit from the automation process within a large facility operation?
 - A. Energy management
 - B. Predictive maintenance
 - C. Staffing and work scheduling
 - D. Budget formulation and execution



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Communication - Overview

Communication permeates every aspect of our daily lives; apart from your intellectual ability there is very little else that influences people's perceptions of you as much as your ability to communicate.

A competent CFM should be able to:

- Manage the communications aspect of contract administration.
- Conduct meetings effectively.
- Create an annual report for the FM department.
- Write a project proposal.
- Give an effective presentation.
- Gain a better overall understanding of different communication types to facilitate better day-to-day communication.



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Communication (continued)

Critical communication areas:

- Selling the facilities budget
- Communicating in emergencies
- Explaining customer needs to designers and explaining designs to customers
- Writing contracts
- Conducting specific types of meetings
- Resolving customer complaints
- Communicating one-on-one with contractors, colleagues, business leaders and upper management
- Writing various forms of documents, including information and decision papers, common memoranda and directives to contractors
- Speaking in decision-making and information briefings
- Conducting interviews
- Evaluating and counseling personnel
- Communicating with local and trade media



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Communication (continued)

Corporate Facilities Communications

- Internal communication channels
 - Chain of command (official)
 - Network communication (functional)
- External communication channels
 - Media
 - Control of contractual information
 - Control of access to job sites
- Contract administration
- Meetings
- Written communications
- Marketing your department and services
- Communicating with different personality types



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Communication (continued)

Can you demonstrate the following performances?

- Use effective communication strategies
- Give directions
- Actively clarify interpretations and confirm understanding
- Make oral presentations
- Actively listen
- Present information visually
- Communicate in writing
- Use communication technologies
- Conduct effective meetings
- Comprehend written and graphic information
- Comprehend financial and technical information
- Negotiate for services, resources, information & commitments
- Establish personal and professional networks



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Questions for Communication

1. To avert innocent but unfortunate gaffes by contract personnel at the outset of a project, the contract should include:
 - A. Specific methods of handing off work from one contractor to another
 - B. Descriptions of acceptable and unacceptable communication patterns
 - C. Existing administration guidelines
 - D. Contract administration procedures
2. In what way can you best communicate the magnitude of change order costs to decision-makers?
 - A. Insist representatives of executive management attend all meetings
 - B. Have end-user representation at each meeting and ask them to initial documents and minutes
 - C. Maintain a cuts-and-adds lists of credits and overruns for executive review
 - D. Send minutes of meetings to executives for their review and sign-off
3. In a hazardous substance release emergency, under OSHA regulations, the first responder awareness level must take action to:
 - A. Contain the release
 - B. Evacuate occupants
 - C. Notify the proper authorities
 - D. Stop the release



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Thank you for participating in the 4th CFM roundtable

At our next roundtable, OCTOBER 9, we will review all 9 competencies, and engage in several group learning activities. Our intention is to have the presentations of all CFM roundtables available for download on the IFMA Orlando website before then.

- **THANK YOU FOR FILLING OUT YOUR FEEDBACK BEFORE LEAVING !**