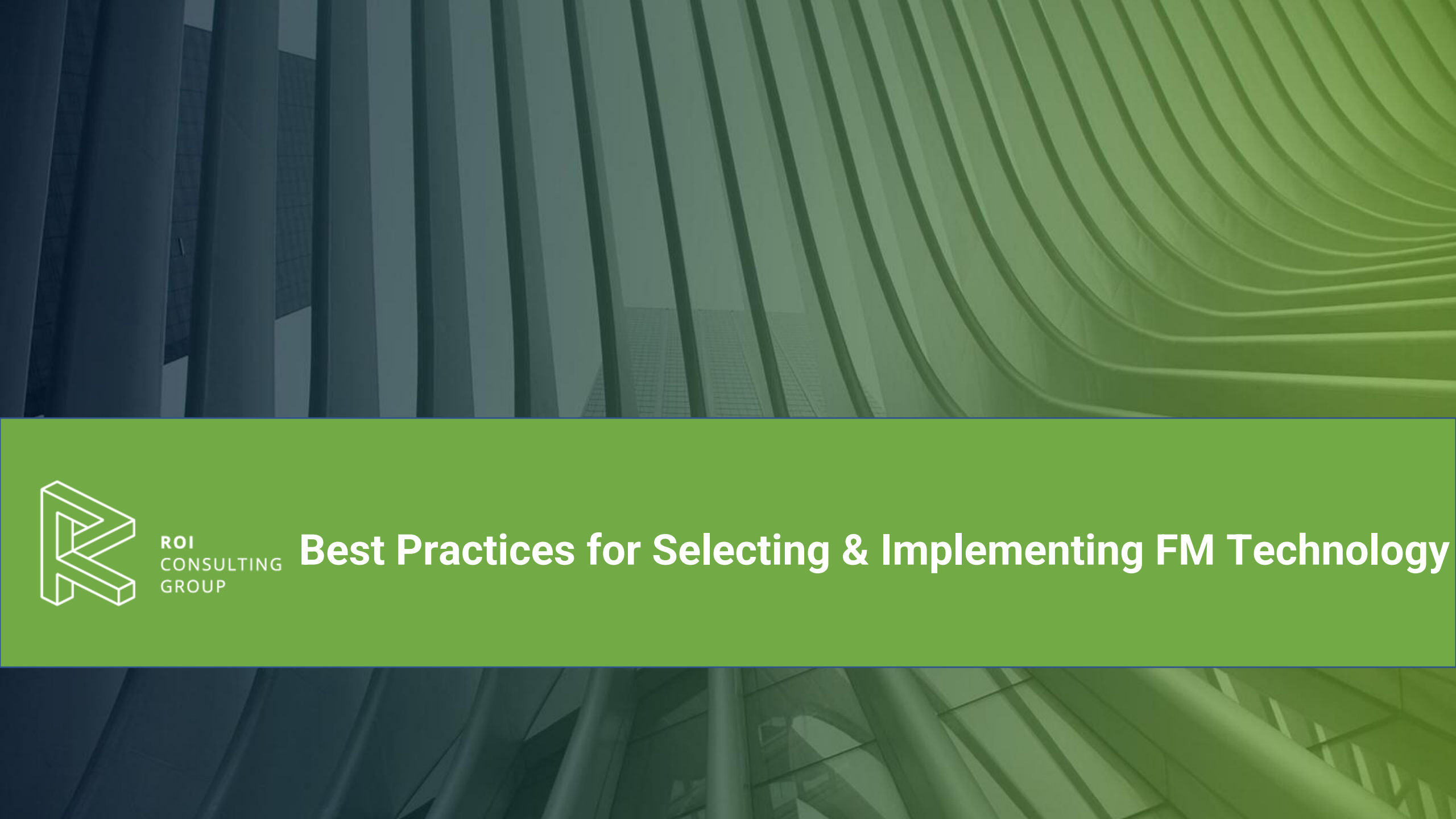

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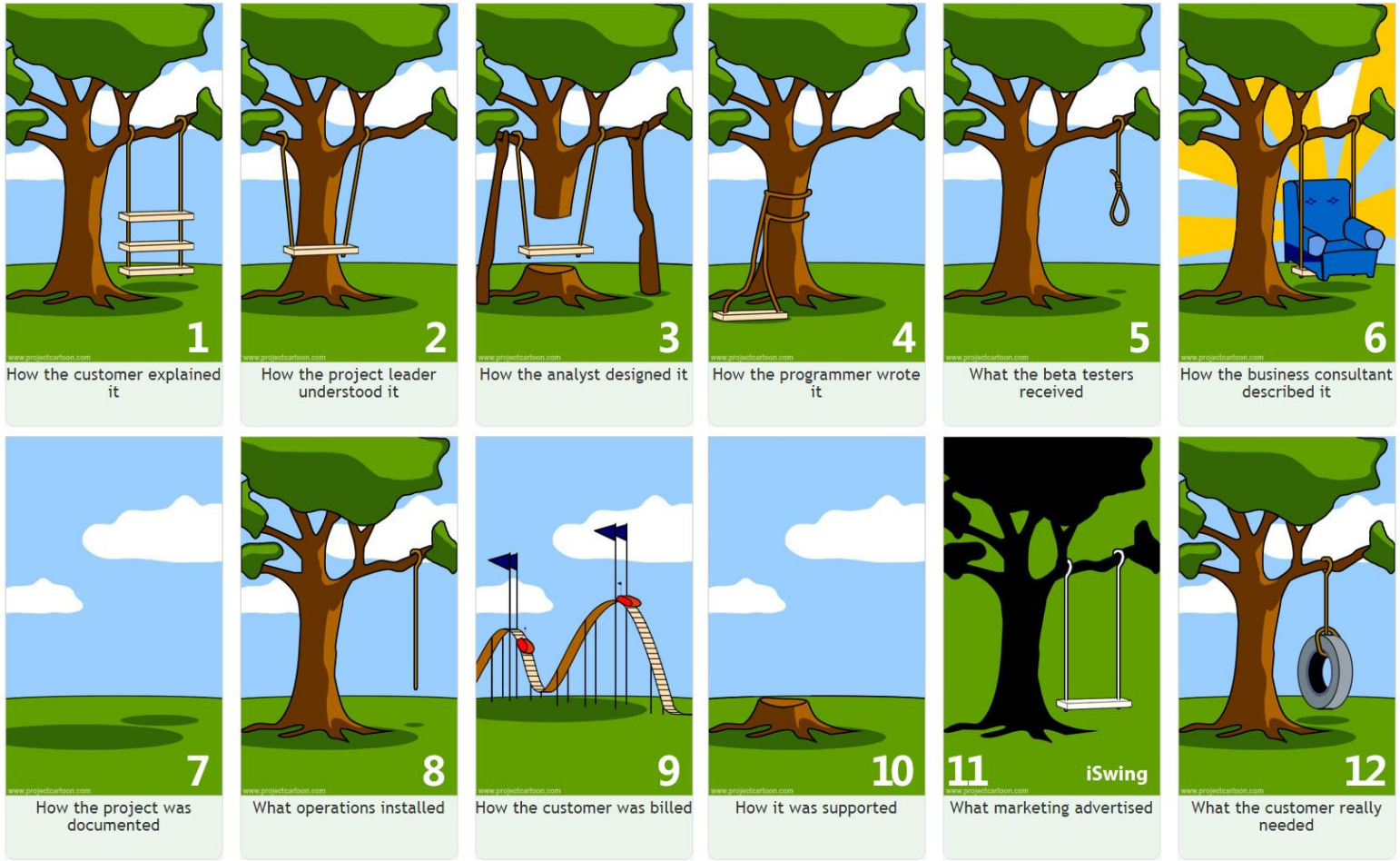
Best Practices for Selecting & Implementing FM Technology

Technology Selection & Implementation Best Practices



https://chrisprijic.com/my-guidelines-on-product-development/

Introduction

Best Practices for Selecting Technology

- Needs Assessment
- Vendor Evaluation
- Technology Considerations
- Justification
- Pilot and Testing

Best Practices for Implementing Technology

- Project Planning
- Data Migration and System Integration
- Change Management
- Customization and Configuration
- Testing and Quality Assurance
- Go-Live and Post-Implementation

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Best Practices for Selecting Technology

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Typical Selection Framework

1. Discover & Define	2. Identify Options	3. Evaluate	4. Validate	5. Select
TASKS				
• Stakeholder workshops • Identify business requirements • Identify IT and procurement requirements • Define evaluation criteria	• Market review • Develop request for information (RFI) • Eliminate irrelevant vendors	• Define demo scripts • Create vendor scoring matrix • Evaluate vendors • Develop detailed scope • Develop request for proposals (RFP)	• Deep dive demonstrations • Client reference calls • Evaluate and eliminate Vendors	• Review licensing • Review pricing • Pricing negotiations • Contracts
OUTCOMES				
Relevant Software Category 	Software Longlist 	Software Shortlist 	Software choice 	Finalize contract
• Business requirements Document • Current state documentation • Evaluation criteria matrix	• Longlist of potential vendors • RFI document	• Shortlist of potential vendors • RFP document	• Vendor selection	• Final contract

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Needs Assessment

Do’s

- Identify organizational goals and pain points
- Engage stakeholders
- Define key requirements (be honest about this)
- Understand your team’s capabilities and limitations
- Get input from people in the trenches not just management

Don’ts

- Leave IT out of the process
- Google every possible feature/function when you don’t really need them
- Think technology is going to magically do your job for you
- Aim for bleeding edge technology when spreadsheets are still a challenge

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Vendor Evaluation

Do’s

- Research reputable IWMS vendors
  - IFMA ITC
  - IFMA Engage
  - IFMA WWP
  - Gartner/Verdantix
- Compare features, pricing, and support models
- Have all vendors follow the same demo script
- Assess vendor stability and industry reputation

Don’ts

- Torture vendors unnecessarily (RFQ, RFI, RFP, 3 rounds of demos, pilot)
- Assume demo prep only takes 5 minutes
- Responding to a 200 page RFP should take more than a week
- Vague or non-specific RFP questions
- Forget to record vendor demonstration
- Ghost the vendors

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Technology Considerations

Do’s

- Cloud-based vs. on-premise solutions
- Integration with existing systems (e.g., ERP, BIM, IoT)
- Mobile accessibility and user interface
- Make sure you understand IT requirements/restrictions upfront

Don’ts

- Buy solely based on price or a pretty interface
- Assume all software is licensed the same
- Just because a vendor says they do something – doesn’t mean they do it well
- Latest and greatest is not always better than tried and true
- Make the new system exactly like the one you are replacing

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Justification

Do’s

- Evaluate licensing, implementation, and maintenance costs – try to look at a 3-5 year TCO
- Consider long-term ROI and scalability
- Benchmark the time/cost of processes pre/post implementation

Don’ts

- Include generic ROI info from a vendor’s marketing materials to justify the purchase to management

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Pilot and Testing

Do’s

- Conduct proof-of-concept trials
- Gather feedback from end-users
- Ensure alignment with business objectives

Don’ts

- Underestimate the level of effort required to setup and conduct a pilot
- Assume the new product is going to work exactly like the old one
- Redesign during UAT

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Best Practices for Implementing Technology

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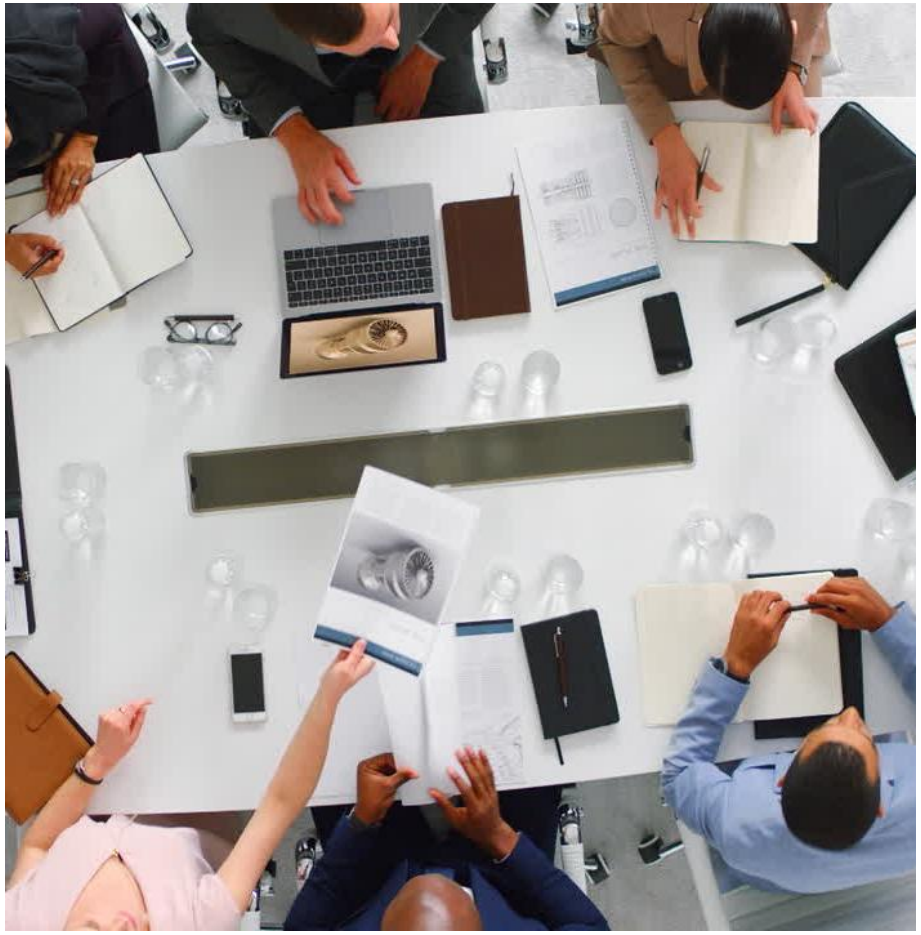
Implementation Delivery



Do’s

- Make sure you have a comprehensive SOW with lots of details
- Understand the difference between Waterfall and Agile
- Understand difference between White Glove or Turnkey vs. “Quick Start” or DIY Implementations

Don’ts

- Try to implement everything all at once
- Think everything needs to be perfect in order to go-live
- Agree to a T&M with out a cap or guardrails

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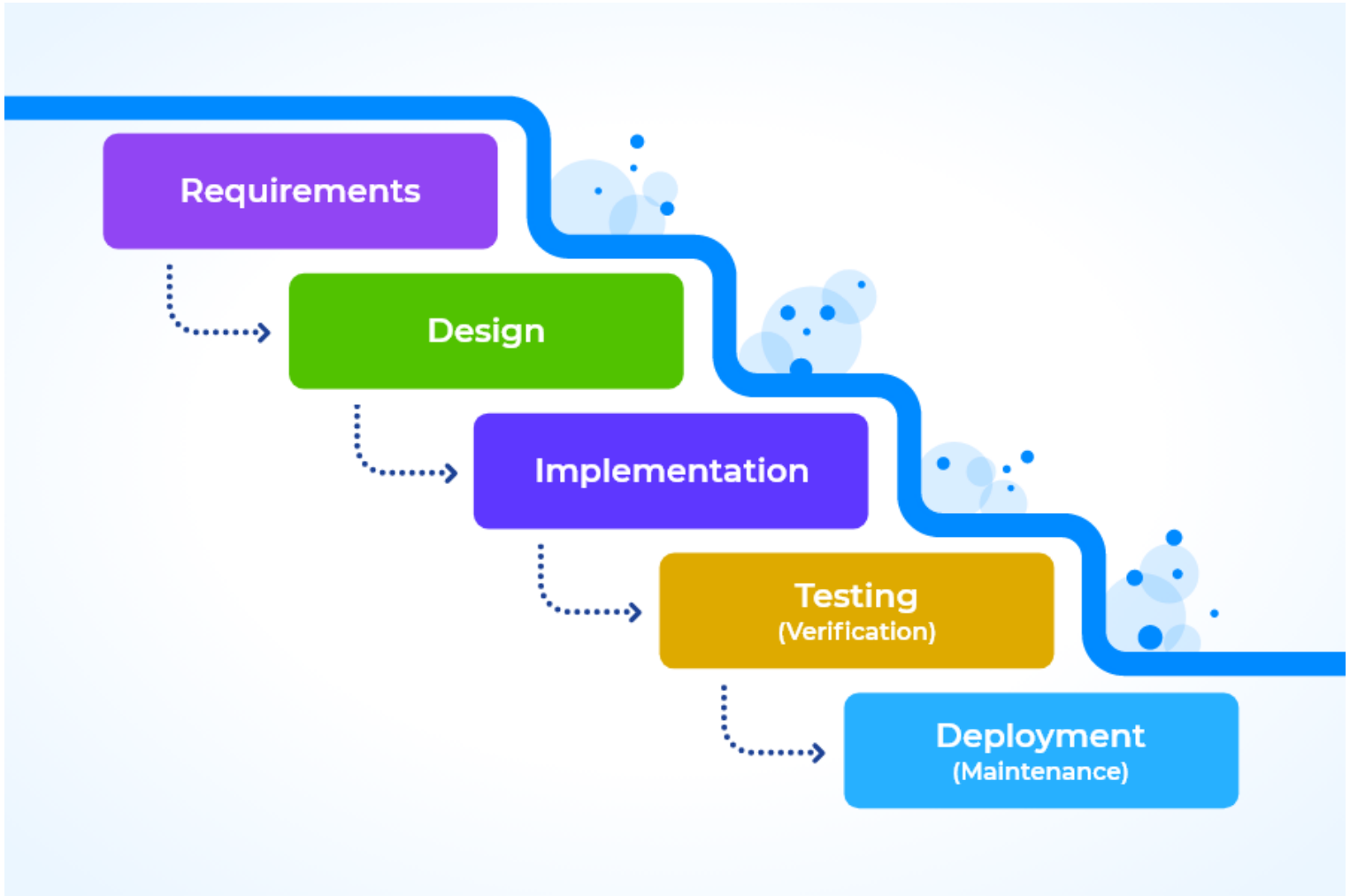
Waterfall Implementation Process



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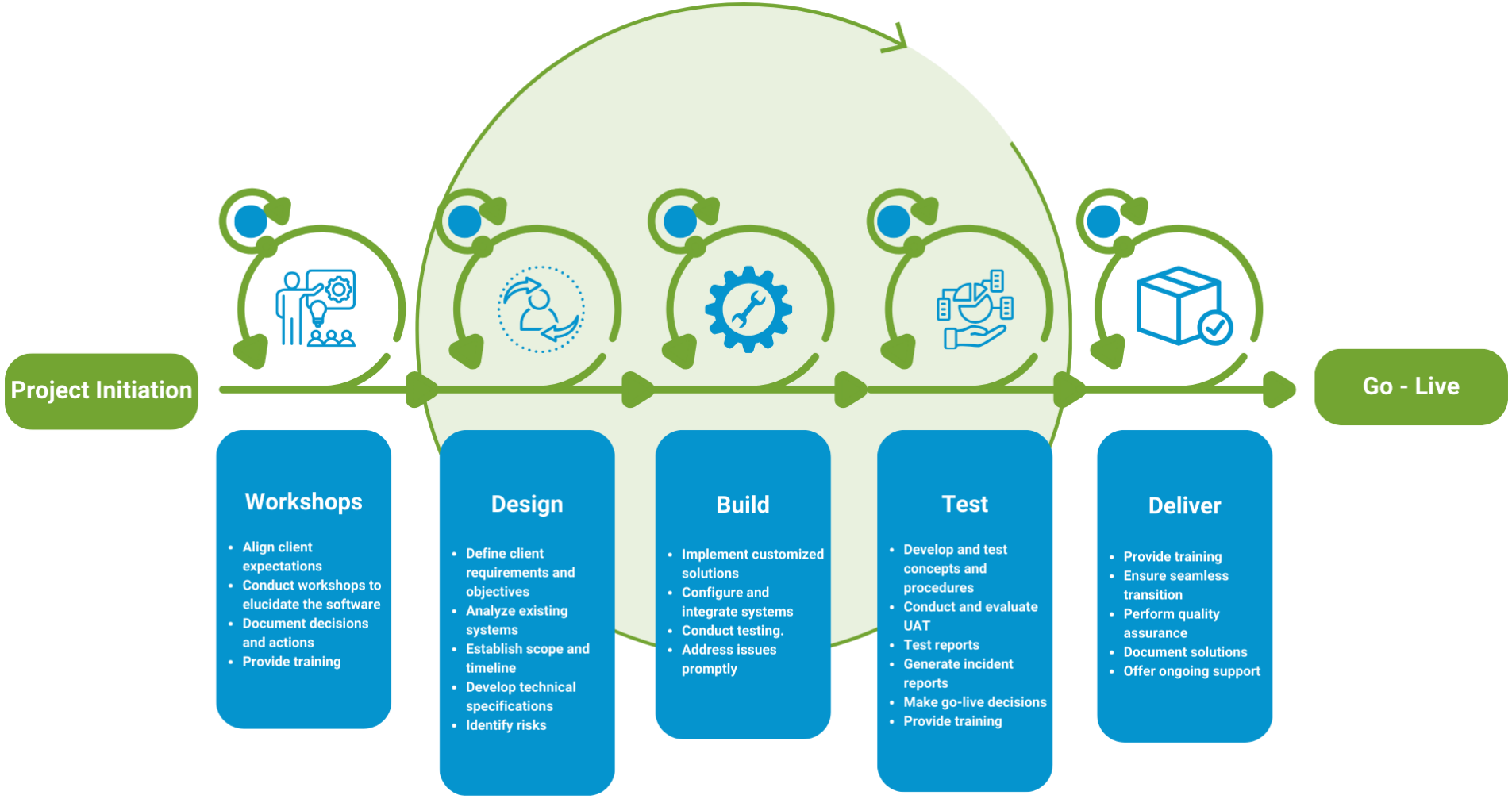
Agile Implementation Process



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Project Planning

Do’s

- Form a cross-functional implementation team
- Develop a clear timeline and milestones
- Allocate sufficient resources and budget
- Get all long lead items ready asap

Don’ts

- Underestimate the level of involvement required from the stake holders
- Include everyone in every meeting
- Decision by committee

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Data Migration and System Integration

Do’s

- Ensure data accuracy and consistency
- Map integration points with existing systems
- Establish the source of truth for all data
- Test integrations thoroughly

Don’ts

- Assume the vendor is going to know if your data is correct
- Assume the vendor is going to scrub your data – unless it is in their contract
- Fix other department’s data

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Change Management

Do’s

- Communicate benefits and changes to stakeholders early and often
- Provide comprehensive training programs
- Address resistance and foster user adoption

Don’ts

- Wait until the last minute to start socializing new technology
- Make concessions for individuals
- Allow users to deviate from the plan

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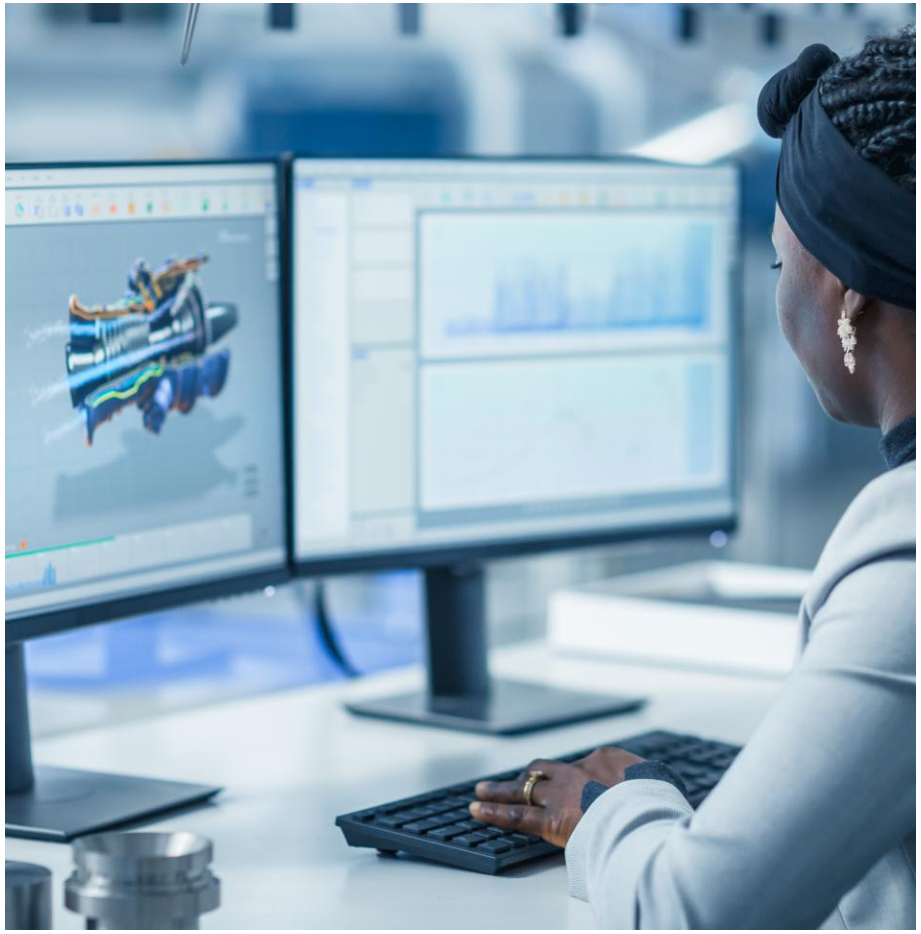
Customization and Configuration



Do’s

- Know the difference
- Tailor solutions to specific organizational needs
- Avoid customization if possible
- Keep it simple
- Consider long term ramifications and downstream impacts

Don’ts

- Customize a new solution to make it exactly like the old solution
- Feature creep

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Testing, Training and Quality Assurance

Do’s

- Perform rigorous system testing (functional, performance, security)
- Perform end-to-end testing not just isolated features
- Validate workflows and reporting capabilities
- Perform regular data integrity checks
- Bottom-up deployment
- Use multiple environments as intended

Don’ts

- Cut corners on training
- Train the trainer is not the same as a user showing a new hire how to do something
- Assume users are doing everything correctly

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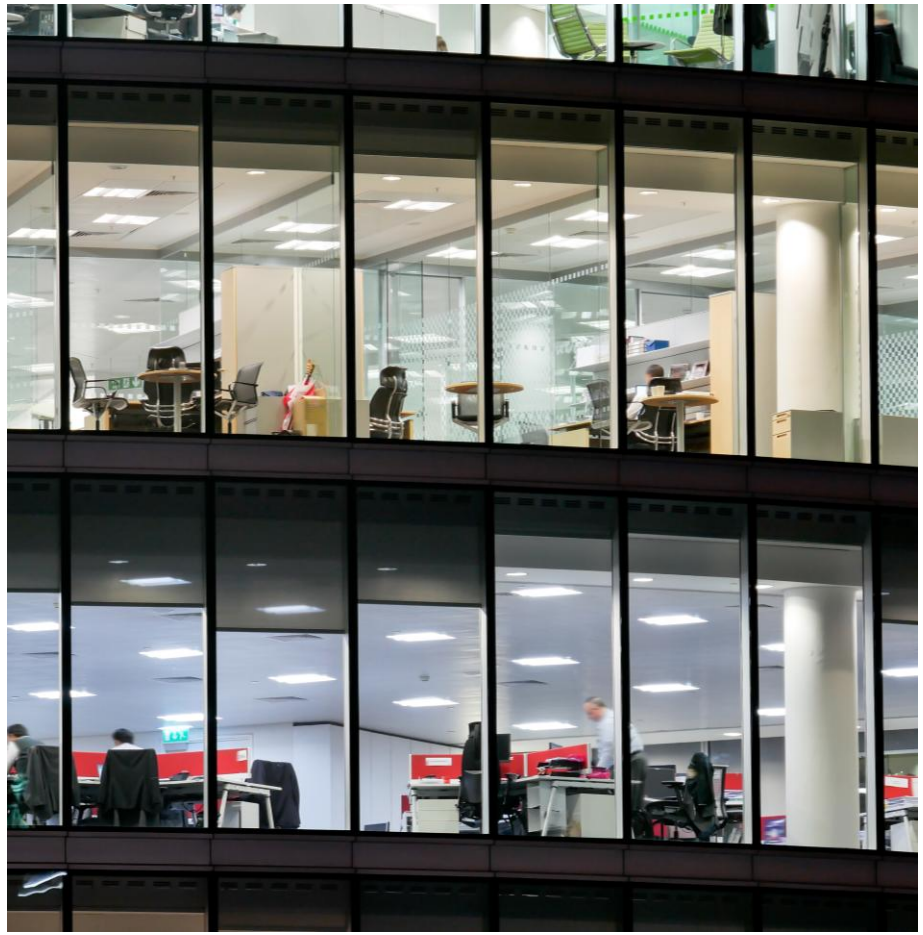
Go-Live and Post-Implementation



Do’s

- Consider Hypercare
- Monitor system performance and user feedback
- Plan for upgrades/updates accordingly
- Establish ongoing support and maintenance plans

Don’ts

- Let data get stale
- Assume users are actually using the new system
- Use it or lose it support/maintenance contracts

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