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Opening DOORS

Tired of being a corporate outsider? An understanding of critical business topics can make insiders of FMs

BY STORMY FRIDAY

One of the biggest complaints among facility managers is that they are often left out — left out of decisions that will affect facilities, left out of information loops that would allow them to plan more effectively, left out of meetings where they could have made a valuable contribution. Facility managers everywhere have long lusted after the coveted position of corporate insider, someone who is so well versed on topics relating to the company that business leaders include them in strategic or operational discussions because they bring value to the deliberations.

The facility managers that have achieved this insider status often are asked to share their trade secrets so that others might follow in their footsteps. They quickly point to diligent research on critical corporate topics and the painstaking

process of committing essential facts and figures to memory, so they can be recalled when they are asked to participate in a discussion.

But what are the topics that facility managers need to understand? And where can the in-



formation be found? From the laundry list of potential topics, facility managers who have become corporate insiders zero in on the following 14 areas as vital, and suggest every facility manager be able to discuss and debate them in detail.

1 Strategic and Operational Plans. The strategic plan is the corporate bible in terms of where a company is headed. It describes the leadership team's vision and goals for the future, and the strategic direction the company will move in to get there. The operational plans are the actionable steps individual departments must take in order to achieve the goals and objectives stated in the strategic plan. Every facility manager should have copies of these plans within arm's reach and the documents should be dog-eared to reflect repeated use and reference.

2 Quarterly and Annual Reports. These reports are the companion documents to the strategic and operational plans. Each quarter and at the end of the year, a company reports on its progress towards strategic objectives, as well as how the company has fared in terms of achieving operational and financial targets. These reports provide snapshots in time for a facility manager to learn about accomplishments, trends and opportunities for future FM participation.

5 Merger and Acquisition Plans. If the goals for corporate growth are not organic, but based on acquisition and merger, a facility manager must know how and when the company plans on moving forward. For obvious reasons, acquisition and merger plans often are not available for "public consumption," which means a facility manager needs to be plugged in to corporate intelligence channels to obtain the information. Knowing about acquisition and merger plans also gives a facility manager the chance to volunteer for the due diligence team that investigates a potential acquisition or merger. As a key member of the team, a facility manager can demonstrate FM expertise on how the bricks and mortar of the new company will impact the existing company's bottom line.

6 Product and Service Development Plans. In a product or service-driven corporate environment, researching new products or services in the pipeline gives a facility manager a perfect excuse to spend time with department heads responsible for these decisions. Decisions about new products and services also have the potential to affect FM service delivery, making it imperative for a facility manager to be proactively involved with the scheduling and timing of new products and services.

7 Regulatory and Legal Issues Impacting the Company. In addition to the regulatory and legal issues affecting facilities management, a facility manager must be fully aware of issues that affect the overall company. Everything from health and safety within facilities to employment, environmental and industry-specific regulations should be of concern and studied by a facility manager. While it isn't necessary for a facility manager to have a legal brief on every issue, it is extremely important for a facility manager to have a grasp of the corporate implications on regulatory and legal matters.

The suggestion from FM insiders for facility managers is to become acquainted with the chief legal officer for the company and have regular meetings to obtain updates. In addition to a learning experience, any help a facility manager can provide the legal department to fend off a potential lawsuit or preempt an impending regulatory change that adversely affects the company, will lend credence to the inner sanctum's notion that FM is indispensable.

8 Information Technology (IT) Plans. It is a well-known fact among FM insiders that the corporate IT plan provides a wealth of information about what is happening within the company. Not only does the IT plan describe the technology changes that will be occurring over a prescribed timeframe, it also provides advance notice about changes that will significantly impact facility management. For facility management organizations that have well established Computerized Maintenance and Management Systems (CMMS) and integrated building infrastructure control and monitoring systems, a drastic change in corporate technology could have a dramatic impact on the facility management organization's ability to perform. At the same time, familiarity with future IT plans allows

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3 Financial Projections, Plans and Reports. Nothing makes a facility manager sound like an insider more than the ability to "finance-speak" in the manner of corporate executives. To achieve in this area means a facility manager must thoroughly understand how the company determines and communicates profit margins and financial growth rates, adjustments to the balance sheet, return on investment, and other financial conditions that impact the bottom line of the company. In other words, a facility manager must learn to think and talk like the chief financial officer (CFO). If a facility manager happens to report up through the CFO, then finance-speak becomes even more significant.

4 Business Continuity and Disaster Recovery Plans. A facility manager must be conversant with the details of the company's business continuity plans, how FM fits into the overall plan and how the FM organization participates in the business continuity management process. Because business continuity focuses on risk evaluation and control, business impact analysis and continuity strategies to ensure complete or partial business continuity, the facility manager needs to have an in-depth knowledge of the plans.



the facility management organization to prepare in advance for customer space and infrastructure changes that will be needed to accommodate new computer hardware and other equipment.

9 Real Estate Plans. If the facility management organization does not have responsibility for corporate real estate and leasing, or is not part of a larger organization with responsibility for the functions, then a facility manager has to have first-hand knowledge of what is happening in this arena. In order to manage proactively, rather than reactively, understand the corporate strategy regarding build/buy/lease decision making, and have a working knowledge of the day-to-day real estate operation.

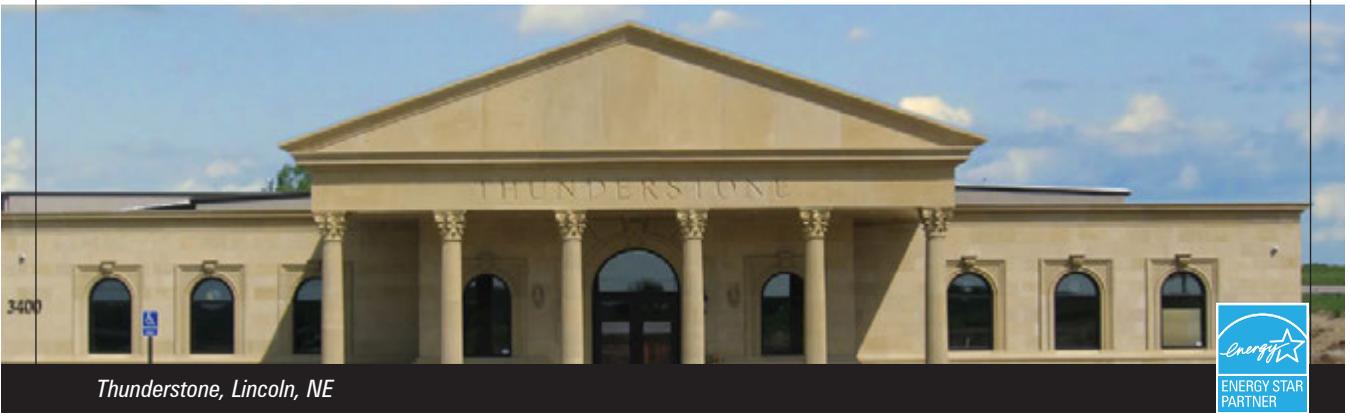
10 Corporate Sustainability Efforts. Aside from what the facility management organization is doing, a facility manager should know what is happening on the corporate side with respect to sustainability. For this purpose, sustainability encompasses green, LEED and other ways that the company is trying to be environmentally responsible. If facility managers aren't leading these efforts, at the very least they need to be fully informed about the corporate strategies and goals.

11 Department Leadership Team Meetings. Many FM insiders have worked their way into department leadership team meetings, either to make a presentation or just to learn about what is happening in the department. From experience, these facility managers say they typically aren't invited to their first meeting and must convince a department head they have timely information to share with the department's leadership team. By making a good first impression, a facility manager can earn a regular spot at these meetings.

Department leadership team meetings provide a wealth of information about a department's activities and how they will affect the facility management organization. These meetings also give a facility manager the opportunity to preview pending facility management changes, provide updates on projects and other activities affecting a department, and learn about strategic initiatives the department may be contemplating.

12 Corporate Sourcing Philosophy. A key component of a facility manager's leadership role is to assess the facility management organization's core functions to determine if partnering with an external service provider will result in more cost effective and efficient service delivery. Proposals regarding potential sourcing arrangements in facility management need to be made within the context of the overall

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corporate philosophy about sourcing in general.

In some companies, for example, senior management would never consider outsourcing custodial services, as the corporate philosophy regards individuals performing this function to be part of the corporate “family.” A proposal from the facility manager to consider outsourcing this function would meet with resistance from the inner sanctum. A facility manager needs to understand the basic philosophy regarding outsourcing and how it has been applied to other departments

als behave, how change will be led and tolerated by company personnel, and what norms must be followed. Without this knowledge, a facility manager will never become an insider; with it he or she has limitless possibilities for success.

Sources for Information

It would be wonderful to be able to say that all a facility manager has to do is call up the corporate librarian and ask for the information described above. If it were that easy, the FM profession would be over-run with corporate insiders.

In reality, facility managers have to do

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within the company, before making a business case to outsource a facility management service.

13 Benchmarking and Best Practice Applications.

One sure way for a facility manager to dazzle the corporate inner circle is to have facts and figures available on the application of facility management benchmarks and best practices, and their potential to have a positive impact on the company’s business. Senior executives love to hear about a proven practice from another company that can readily be adopted. When a facility manager makes a fully-developed business case for application of a best practice, senior executives take notice.

14 Corporate Culture.

This is an often-neglected corporate topic, but is understood by some facility managers as the most important. Corporate culture tells a facility manager more about how the company operates than any of the plans or practices previously discussed. A savvy facility manager knows the company’s culture dictates how decisions are made, how individu-

a lot of homework — digging, talking, reading and exploring within their company. It means facility managers have to walk around the company’s facilities to observe and inhale the corporate culture. They need to see how individuals interact with one another, where they meet and how they conduct their formal and informal business. And they have to comb the corporate annals to understand strategic trends and obtain insight into future goals, objectives and strategies for growth and expansion. What’s more, they put in the time required to memorize the information they’ve uncovered.

Facility managers also have to cultivate relationships with key individuals within the company. They have to knock on doors and get to know who the key players are and how they fit into the decision making process. Companies have “soothsayers” and “information gatekeepers” who always have an inside scoop on what is happening and facility managers need to sit with them and absorb their wisdom.

Facility managers who have become corporate insiders typically have the finest libraries in their offices, often boasting documents that are not found



anywhere else in the company. As part of their learning journeys, they cultivate individuals who will have a hot-off-the-press edition of the annual report or strategic plan to ensure they will be on the distribution list for advance copies.

These same facility managers attend information sessions and briefings on corporate research and development, and always appear at the corporate unveiling of a new product or service. They are as friendly with marketing staff as they are with legal and IT, often being invited to staff meetings or brainstorming sessions.

Outside the company, smart facility managers have a network of peers across the facility management spectrum they regularly talk with to share ideas and problem-solve. They attend industry workshops, forums, webinars and other information dissemination opportunities, absorbing every best practice for some potential application within their facility management organization. These facility managers aren't afraid to conduct benchmarking sessions with peer institutions and even competitors, in order to ensure that their organizations are leading in continuous improvement and industry standards. They blog and connect through social networks to make certain that they have a broad constituency to draw upon, should a problem or issue require an extended reach.

Becoming a corporate insider is a reachable goal for any facility manager who is willing to work at having a strong corporate knowledge base. The reward is the ability to influence corporate decisions rather than simply react to them. **COM**

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