



HR & SPACE MANAGEMENT

The Case for a Visually Integrated HR and Space Management Solution

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Executive Summary

In most companies, the worlds of human resource management and physical infrastructures have long been separate silos inside the building walls, creating inefficiencies and conflicts when changes need to take place in the workplace. A major cause of disruption is the on-boarding of new employees – where HR data cannot connect to space planning data (floor plans). Consider when HR assigns new employees to vacant workspaces, not knowing what the future plans are for that particular space. Cross-departmental disputes arise, both management and staff invest time needlessly, and it plays out throughout the organization in various degrees of chaos.

One company, Southern California Edison (SCE), experienced this very scenario in their workplace of over 50,000 employees and partnered with Facility Management Planners, Inc. (FMP) to implement an Integrated Workplace Management System (IWMS) to achieve their goal of being able to visually compare their HR data (stored within their SAP system) with their space data (in AutoCAD drawings) in a single software solution.

The IWMS solution that was designed and implemented into SCE handled the visual integration of HR and space data, creating immediate benefits in eliminating human error in HR's placement of new employees, developing a new, single online source for reserving rooms without any conflicts, and bringing the company's infrastructure and human capital data into one visually accessible and manageable tool.

SUMMARY AT-A-GLANCE

- Managing change in an organization is an ongoing challenge. And nowhere is that more apparent than in the HR department in recruiting and hiring employees
- When there is a disconnect between HR's information and space planning's data, disruption can occur in the workplace when seating new employees arbitrarily – and not having access to space planning's visual data.
- Our case study here with Southern California Edison shows how they achieved their goals of being able to visually compare their HR data with their space data with an Integrated Workplace Management System (IWMS), creating a streamlined and effective on-boarding process.



Introduction to the Problem

If there's one constant that never changes in business, it's that change is a constant. This is especially true today more than ever. The intersection of technology, data, and interconnected workplaces has created a constant disruptive energy that is difficult for companies to manage. Organizations invest time and resources anticipating, managing, and establishing policies and practices to make change work. In this report, we will focus on one of those areas within an organization that faces change on a daily basis – a company's Human Resources (HR) department – specifically hiring and recruiting.

Most companies have detailed procedures in place for recruitment and hiring. This is a comprehensive task, which includes a multitude of tasks involving personnel inside and outside of the HR department. For example, when a company brings on a new employee, this employee needs to be seated in a cubicle or office on company property, requiring specific equipment to perform their job effectively. At the time the workspace is assigned, a company may seat this new employee in a space simply because it is vacant and easy. But this sudden and arbitrary placement of an employee may create a chain reaction of disorganization and inter-departmental conflict, bringing on new issues to solve and much time and money can be wasted over what is a seemingly innocuous task – finding a desk for a new employee. But it's not a simple task anymore. Especially when we extrapolate this process across an entire corporate-wide, company portfolio, and the hiring – or “on-boarding” process – for employees becomes a daunting task to manage effectively.

While it may seem harmless to seat one or two employees “temporarily” in a location, this disconnect between HR and space planning sucks all the accountability or communication between departments out of the building. And this vacuum of knowledge and connectivity allows corporate politics to fill the void, many times leading to territorial disputes, finger pointing, and cyclical debate. All killers of efficiency and productivity. Therefore, two different types of data need to be exchanged and accessible in communication with each other if personnel space is to be managed effectively:

1. The HR Data (employee information)
2. Space Data (floor plans)

To see how these two data sets come together to solve this problem, throughout this report we will focus on one case study – Southern California Edison (SCE) – a utility company based in California. Their challenge was finding a way to visually compare their HR data, which was kept in their SAP system, with their space data, which was interactively maintained through ARCHIBUS® within AutoCAD drawings. (We will go into more depth on ARCHIBUS later on in this report.) This led to the inability to determine their net occupancy. Net occupancy refers to the count of how many people are occupying a given space, and by comparison, the remaining vacant spaces that might be either available or occupied by some other non-personnel space.

The solution to this problem is creating real-time communication between the corresponding HR and space departments to make the on-boarding process as streamlined and effective as possible. For a company to effectively forecast growth and space needs, a thorough knowledge of historical trends, space availability, organizational distribution, and employee locations is needed. Having these resources will provide a tremendous productivity advantage, allowing new employees to be seated efficiently with little transitional time required and no disruption in the workplace environment.



Implementing an Integrated Workplace Management System (IWMS)

What is IWMS? And why would it be a good fit?

Utilizing an Integrated Workplace Management System to facilitate and integrate the communication of HR data and space data is an effective and highly desirable solution. An IWMS system is characterized by an enterprise-level software solution that integrates four key components of functionality:

1. Real Estate and Property Management
2. Space and Planning Management
3. Asset Management, and
4. Building Maintenance.

What makes an IWMS the best solution is its ability to be flexible enough to be designed to simulate unique business and managerial processes. With the introduction of easily accessible web-based technologies and applications, IWMS can take workflows and processes a step further by providing in-depth, dynamic data solutions for companies and businesses looking to get the most out of their workforce, research, data, and operational metrics.

When looking for the right IWMS solution, three attributes must align:

- **One Application** – for an IWMS to be truly interconnected and visually available throughout an organization, it has to house all information in one database or system application.
- **Process Driven** – it has to be workflow dependent, whereby a business can tailor the IWMS to fit its unique business processes
- **Web-Based** – in today's mobile workforce, having accessibility to all users eliminates the need for costly multiple resources and programs.

The Product Solution: ARCHIBUS®

“ARCHIBUS is the No. 1 provider of Real Estate, Infrastructure, and Facilities Management software.”*

ARCHIBUS is an open-sourced, modular IWMS that utilizes a centralized repository for storing and manipulating information used in a web-based dynamic environment. With over 30 years of helping businesses achieve success in facilities management, their software has evolved into strategic, centralized solutions that operate from a single database and offer workflow tools, executive dashboards, and predefined and customized reporting.

**I know this is what they say on their website, but it needs to either be footnoted with supporting data or a quote from someone of rank in the industry saying that.*

FMP's Solution for HR and Space Management to Visually Connect

Facility Management Planners, Inc. (FMP) is a progressive consulting and information management firm that partners with clients to design a solution to manage the entire lifecycle of their real estate and facility infrastructure assets. FMP empowers users to take charge of their own business processes, and in so doing, helps a business to control costs and protect capital by providing relevant, actionable data. FMP understands why introducing new business processes benefits an organization. And more importantly, FMP knows how to execute the changes, even in refining the ones that already exist. FMP provides any business environment with a vast array of analytical tools that stimulate accountability and efficiency and increase visibility and automation enterprise-wide.



Maximizing SCE's ROI with a Combined Team: ARCHIBUS + FMP

SCE – with 50,000+ active employees and 8 million square feet spread across Southern California – wanted a better solution to effectively on-boarding employees. They were seeing the negative effects of not being able to integrate HR and space data. They engaged internally with their SCE Facilities, IT, and HR departments to collectively map out the ideal information integration process. With FMP and the ARCHIBUS solution, a single data integration solution was designed to handle the visual integration of HR and space data within SCE.

Immediately, SCE benefited from the implementation efforts with:

- Data analysis and clean-up that eliminated redundancies and errors throughout the organization.
- A fully accessible Room Reservation system created to promote accountability and reduce scheduling conflicts.
- New powerful, interconnected, and understandable workflows in data views, making the processes more user-friendly.
- Created efficiency of scale in being able to expand into the future with possibilities for further integration and future business development within their modular system.

Taking a Deeper Dive into the Specific Problems and their Accompanying Solutions

In this section, we take a deeper dive into the three ways that SCE reached their goal and took advantage of IWMS with FMP's guidance and implementation. The three problem areas are:

1. Closing the Gap on Two Separate Systems
2. Handling Room Reservations
3. SAP Unable to Handle Data Types

Problem 1: Closing the Gap on Two Separate Systems

One of the problems that prevented SCE from achieving its ultimate goal of calculating net occupancy was the fact that their information was not gathered in one centralized source. SCE manages their HR Data through SAP, and space data is maintained through ARCHIBUS. This type of storage is known as siloed information, where data is kept in separate repositories or formats, and is incapable of working with other managerial systems.

Updating and extracting data was a time-consuming manual process rather than a result of a dynamic database workflow processes. Additionally, the HR data was unable to communicate with the space data because the space data was in a drawing or visual format. Space data can be kept in the SAP system, however it was in a list format, which does not present any opportunity to plan or create proposed reconfigurations.

The FMP + ARCHIBUS Solution:

The highly desirable alternative to this is to create a real-time interface between the HR and space management data by merging them both into one system. This changes and simplifies the workflow process. It completely eliminates the “lag time” and chance of error when transferring information between departments. A workflow was created by utilizing an HCM SAP connector to ARCHIBUS, and as consequence, the previously specialized process required for updating ARCHIBUS with the SAP HR data was transformed into an automated process. Space management now has immediate access to the HR data because the HR department is entering employee information in real time – transferring and processing data into the same database that the space management department is working with.



Problem 2: Handling Room Reservations

SCE's method for scheduling or removing room reservations for personnel and support type spaces was anything but lean and agile. A space manager had to physically walk the floor with a copy of the floor plan in hand to determine which spaces were vacant, occupied, or reserved. Then mark such notes on the floor plan. The problem with handling room reservations in this manner – aside from the time and effort wasted by having to constantly walk the floor – was that if the space was previously reserved by someone else, the space manager would not know about it unless some sort of “reserved” mark was designated on the space. Records of reservations were not kept or shared, and there was no formalized process for determining if the reservation for a space was still active. Furthermore, since no process was ever created, every space manager took the task into their own hands and created their own way of making reservations. Imagine the limitless possibilities for different and confusing methodology.

The FMP + ARCHIBUS Solution:

FMP designed a space certification process for SCE to aid in accounting for perceived occupancy. As part of this process, managers are now required to input a reservation into their existing system whenever they want to reserve a space. Additionally, spaces are now categorized, where vacant spaces take on multiple types of uses instead of just being unoccupied. For example, these vacant spaces might be used for temporary storage, a reservation, or hoteling for contractors. In this sense, it helps space managers gain an understanding of which spaces are truly vacant, allowing them to plan for incoming new hires.

Problem 3: SAP Unable to Handle Data Types

Sometimes software is not designed to properly handle certain types of data. Just like having the right tool for the job, tasks can be a breeze if used correctly. However, having the wrong tool can either drastically increase the amount of time required to accomplish a task, or if no other tool is available, a costly and time-wasting workaround or “Band-Aid” type solution will be created to satisfy the demand. In SCE's situation, the SAP system was used to store and manage all HR data, but this system was unable to provide a visual way to analyze the associated space data. This isn't to say that the list format is not desirable or effective – it means there was an inability to relate the space data to the HR data. Consequently, there was no way to report on the occupancy of a building, and further, the perceived occupancy was unable to be determined as well.

The FMP + ARCHIBUS Solution:

ARCHIBUS's foundation is space data. Based on this space information, the relationship that this space data has to employee data can then be visualized and realized. ARCHIBUS has proven ability to handle space data the way in which space planners and facilities teams need to see and manage their data. This created all-new benefits inside SCE:

- Bi-directional management
- Vacant space takes on multiple types of uses
- Multiple employees can be assigned to one room, which in turn, eliminates duplicate information and records
- Automation of employee data being populated daily through a web call removes the chance for human input error

The Business Benefits of IWMS for SCE

Understanding the importance of perceived occupancy as a valuable statistic can be achieved when availability of space is seen at the useable level. What types of people occupy space? How many of them are occupying it? And if there are available spaces, will they become reserved in the future? These types of questions can now be answered and viewed in real-time using the Web Central interface from ARCHIBUS.



Let's explore two of the benefits from combining HR data and space data, and how that integration made a huge impact within SCE:

Achieving True Visual Integration Across the Enterprise

Web Central – ARCHIBUS's virtual database where all data can be viewed, analyzed, and generated – embodies a practical, user-friendly interface, where multiple users across different disciplines and specializations can utilize the tools with ease. All executives, employees, contractors and consultants have the opportunity to use the same application. In the case of SCE, using Web Central means that all drawings and space data can be viewed without requiring any AutoCAD experience. This means that for those space planners whose expertise is in HR, will no longer need to wait for CAD specialists to share drawings. The Web Central interface from ARCHIBUS helps every user become more invested and more familiar with a company's assets, whether it be HR or space related.

The company-wide usage of this internet/web-based application also means that the remote functionality of the software is an effective workplace efficiency tool for those who work remotely or are often in the field, as is the case in more and more companies that have increasing mobile workforces.

Turning the Facilities Department Lean and Agile

Maintaining the SAP system, while concurrently maintaining space data in a separate system, required specific processes and extensive manual input. The previous process for managing employee locations was comprised of lengthy, arduous Excel worksheets. A CAFM liaison would have to clean up data from the worksheets, verify seating arrangements (usually done by contacting numerous space managers from multiple offices), and normalize a set of move tickets and process them through the SAP system. This translated to higher costs, specialized training, and in worst-case situations, a much higher chance for error due to the amount of data handling.

All of these steps have not only now been removed, but they are all automated in this On-Boarding SAP ARCHIBUS connector. System automation of the HR processes drastically cut down on manual input, reducing maintenance-based tasks and increasing the accuracy of the data.

Conclusion

The collaboration with SCE and FMP began a transformation to automate, streamline, and connect many forms of data that were previously difficult to manage. While the many systems that they had implemented were all accurate, the key was that the data contained therein was not relational, and the pre-existing and still current SAP system now communicates directly with the ARCHIBUS system. The automation of the systems has produced a much more manageable solution, and in turn, has improved the ability to maintain accurate records due to the ability for the end user to use and view space and employee data on a visual level.

"We believe ARCHIBUS will save us money by giving us a better handle on our space inventory so that we can more accurately match our projected space needs and available resources." - Robert G. Schuur, Senior Project Manager, Strategic Planning, SCE[date?]



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About FMP and for More Information

FMP specializes in enterprise-wide consulting and data management solutions that allow our clients to gain control over their real estate and assets, helping them to make well-informed strategic decisions and lower operational costs. We offer our clients proven facility management best practices combined with innovative IWMS technologies. FMP leverages the ARCHIBUS® software to suit the wide variety of processes and tasks companies already have in place. ARCHIBUS is an industry-leading tool for those looking to leverage all of their company's assets, and to effectively manage all facets of their operational process. In union with ARCHIBUS, FMP creates an information system to effectively handle the evolving workplace.

Let FMP provide the right systems consolidation tools to build cost containment and efficiency into your Lease Management process. To learn more about FMP's solutions, please visit us at www.fmpca.com or call 619.398.8963 or email: info@fmpca.com.

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