The Importance of Leadership
领导职能的重要性
FM and Asset Management
设施及资产管理
Hosted at: Shanghai, China
Vision Statement
The FMCC is the resource and voice for Facility Management Consultants worldwide to leverage our collective expertise to benefit IFMA members, and the Facility Management profession.

Mission Statement
To serve as a global Facility Management consultants' resource and representative for Knowledge Sharing, Networking and Business Opportunities in support of our impact upon the built environment and value to their clients.
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Today’s Presentation

Moderator:

Josh Amos, IFMA Components Liaison

Presentation Title:

“The Importance of Leadership in Facilities & Asset Management – FMCC Panel Discussion”

Presenters / Panel:

• Val Moraes, CFM, MBA, President Elect FMCC, Global Liaison South Asia FMCC & Director GregMore Group (New Zealand)
• Adam Fang, FMP, Associate Director at DTZ (China)
• Graham Constable, BSc, MBA, PVM (Australia)
Presentation Logistics

• Polls will be used throughout the webinar
• Q&A at the end of the presentation
• Quick survey at the conclusion of the Webinar
• PowerPoint & Recorded Webinar will be available online via FMCC’s Website (fmcc.ifma.org)
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Val Moraes, CFM, MBA Managing Director, Gregmore Group

Val Moraes CFM is the Managing Director of GregMore Group, a Facilities Management Consultancy based in Auckland, New Zealand. He has more than 25 years of Facilities Management experience in various countries including India, Australia and New Zealand. His past experience includes senior FM roles with Super deluxe Hotels (Oberoi Group), High Rise Commercial Buildings (Colliers International) and Supermarkets (Progressive/Woolworths Australia) besides large Corporates.

He holds a Graduate Certificate in Building Management (GCBM) and a certificate in Project Management from Victoria University, Wellington. He is also the first New Zealander to be accepted as a Certified Facilities Manager (CFM) from International Facilities Management Association, (IFMA).

Besides being one of the Founding Fathers and Foundation Board Member of Facilities Management Association of New Zealand (FMANZ), he is also the Immediate Past Chair and currently sits on the FMANZ Board besides representing the association at Global FM.

Val is an Accredited Professional for Green Star rating of Buildings in New Zealand (GSNZAP).
Presenter Bio

Adam Fang, Associate Director, COE Head of PFM department for Greater China at DTZ since November, 2013. Adam has rich experiences in the field of Facilities Management operations, process reengineering, MEP and assets management, etc.

Before joining DTZ, Adam served as Facilities Engineer at Synergis Facility Management and then Account Manager for EXPO (Aden Services), ExxonMobil and DBS (JCI) respectively since 2005. From the years of FM practicing and experiencing, Adam has learnt and managed solid series of operational processes and procedures, case and root cause analysis, industrial benchmarking and customer services, etc. that made him a vocational facility manager in the field.

Adam’s majors are in Thermal Power HVAC & Refrigeration at Shanghai Maritime University and English literature at Shanghai Foreign Language University respectively.
Reducing costs is the key component of the FM value proposition. But is “reducing costs” always a good Strategy for a client?

降低成本是设施管理价值主张的重要组成部分。但“降低成本”是否对客户来讲是最好的策略？
The Typical Asset Management Element of Strategy

- **Maintenance & Operation**
  - An optimized Maintenance approach (Cost vs. risk)

- **Energy**
  - Operational and capital energy reduction measures

- **Capital Effectiveness**
  - A standard end-to-end process from budgeting through project execution that optimizes life cycle cost, risk, and energy/carbon

- **Risk**
  - An approach to managing facility asset risk linked to uptime goals
Energy vs. Capital

Initial Cost vs. Long-term Cost
初期成本 vs. 周期成本

Decision making 制定决策

Maintain Cost vs. Energy Cost
维护成本 vs. 能源成本

Run vs. Maintain
经营 vs. 维护

Investment of renovation vs. Risk
投资改造 vs. 风险

Availability vs. Efficiency
实有性 vs. 效率

Repair vs. Replace
维修 vs. 换新
Corporate & Industry Asset Management Activity

Asset Management Program/Best Practice/Organizational Requirement/Alignment/Competence/Data

ISO/Local laws and norms/industry benchmark

Specific Asset Management Programs aligned to client goals and business strategies

Act
The Path to Maintenance Management of Asset management
资产管理的维护管理之路

Strategic Asset Management 资产管理战略
• The “whole life” or “lifecycle” management of an asset.
资产生命或生命周期管理。

Tactical Maintenance Management 维护管理策略
• Maintenance keeps an asset performing to the standard that is required. 维护保持资产所需的运作标准。
• Maintenance management deals with the planning, organizing, and reliability management required to achieve asset performance standards. 维护管理涉及规划、组织和可靠性管理要求，实现资产的性能标准。
• ...Maintenance is only part of the asset life cycle 维护只是资产生命周期的一部分。
A Detailed Strategic Work Planning of Asset Maintenance

Before performing the work, the Site resource is provided with the CMMS work ticket (via handheld or paper ticket) as well as the proper asset specific procedure obtained locally based on site practices (off system).

Detailed procedures on “how” to perform the work will not be directed by CMMS, but by the local documentation provided by either the manufacturer, service provider or local facilities.

- Leasing or own the facility for different strategy of Asset Management
- Investments to replace (Capitalized budget Plan)
- Energy audit
- Database for benchmarking
- Risk Assessment
- Resources utilization

Asset Types

- Asset Management System
- Database
- Strategic Planning
- Detailed Work Instructions

Hard Copy O&M Manuals stored locally at the site

Electronic manuals uploaded into CMMS

Corporate Facilities Resources

Job Plan

Assets & Facilities

O&M Manual

Details Work Instructions

(Stored & Maintained Locally)

Asset Management System

Database

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Decision to the next step of improvements 决定下一步改进策略

Database 数据库

Cost 成本

Row Data 原始数据

Failure Rate 故障率

Age 寿命

Performance 绩效

Age 寿命

Direct Data Feed 直观数据摘要

Quantitative Analysis 定量分析

Failure Rate & Cost 故障率与成本

Cost & Performance 成本与绩效

Performance & Failure Rate 绩效与故障率

Quality Reporting 质量报告

CM vs. PM (纠正维护与预防维护)

Asset View (Report) 资产视图（报告）

Asset Benchmarking 资产基准

Risk Profile (FRAME) 风险（框架）
The Importance of Leadership
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*FM and Asset Management*
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Presenter Bio

Graham Constable, BSc, MBA, PVM

Proven competence in strategic and operational facilities and asset management and broad business experience gained over many years in leadership and consulting roles in the UK, Europe and Australia. I work predominantly at senior management and executive level helping clients with business improvements, change and organisational development. Strategic thinker, developing creative ideas and strategies for businesses and for the cost-effective management of clients’ facilities and built environments.

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Statement

All too often the FM practitioner is more focused on tactical and operational matters rather than the leadership focus required to understand and support a corporate vision and business goals. Moreover an asset management strategy needs to represent, add value to and align with a corporate vision and importantly facilitate organisational development and change.
Facilities Management

- Understand the Corporate Vision
  了解企业目标

- Understand Stakeholders and their needs, aspirations
  了解潜在客户及其需求、意向

- How best to support the vision and corporate needs
  如何尽最大达到企业目标及需求

- How and where to add value
  如何及在何处增值

- Structure the team accordingly
  团队建设

- Leadership across boundaries
  跨界领导力
Asset Management 资产管理

• Strategic Asset Management Plan (SAM Plan) versus Organisational Asset Management Strategy (OAMS)
战略性资产管理计划(SAM计划) VS 组织性资产管理战略(OAMS)

• SAM Plan focuses on the assets and integrated nature of the business in terms of managing the asset
SAM计划侧重于资产及综合业务的管理

• OAMS focuses on organisational change and development that will realise value in the assets that facilitates realisation of the corporate vision
OAMS侧重于关注组织的变更与发展产生的增值效应，以促进企业目标实现
The OAMS Structure

Client Organisational MasterPlan

Organisation Units

Finance
Assets
IT
HR
Learning & Innovation
Corporate Enablers

Org Asset Mgt Strategy (OAMS)

FMS

SAM Plan
Corporate Enablers

Corporate Shapers

Unit Plans

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The strategic drivers to the organisation (Corporate Operations) are seen as implicitly subservient to Student Support Units. Strategic drivers to the organisation (Corporate Operations) are seen as implicitly subservient to Student Support Units.

Corporate Operations is trying to navigate/satisfy multiple competing views and consequently its efforts are being fragmented.

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Finance accumulates these disparate views and tries to make sense of competing unit business views. Finance accumulates these disparate views and tries to make sense of competing unit business views.
A different model places high order Corporate Operational planning as the driver to organisational delivery. 这是企业运营规划。不同模块的高阶企业运营规划推动组织交付。

Enterprise financial capacity planning informs an integrated strategic corporate operations planning effort. 企业财务能力为综合性企业战略运营规划提供信息。

High level/long term outlook for these business drivers then enables operating units to plan within a known scope of operation. 高层/长期前景作为业务驱动因素，使得经营计划在已知范围内。

This is culture change. Not easy. 该文化改变任重道远。
Undertaking higher order operational planning then practically informs Portfolio/Project Planning and Delivery. 承接高阶行动规划，特别能为投资组合/项目规划和交付提供信息。

Addresses the expressed concerns about consistency of decision making and effective governance. 关注决策力和有效治理的一致性。

Fills the missing links in organisational strategic planning. 填补组织战略规划的缺失环节。
Q&A

Val Moraes, CFM, MBA, President Elect FMCC, Global Liaison South Asia FMCC & Director GregMore Group (New Zealand)

Graham Constable, BSc, MBA, PVM (Australia)

Adam Fang, FMP, Associate Director at DTZ (China)
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IFMA’s FMCC World FM Day Webinar Live
Session 4 – Eastern Europe / Middle East:
“Progress in evidence based workplace management”

“Progress in evidence based workplace management”

by Wim Pullen (The Netherlands)

Date: June 10th, 2015
Time: 1:00 – 2:15 pm Gulf Standard Time (Dubai) = 9:00 – 10:15 am UTC

Presenter(s):
- Wim Pullen, Director, Center for People and Buildings, Delft, Netherlands

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Thank you for joining us!

Please take a moment to answer our brief survey at the conclusion of the webinar.

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