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# How to Write an Awesome Facilities Management Data Specification

Mark Mergenschroer  
Customer Success Engineer – BIM 360 Ops

## Learning Objectives

- Critical questions to ask facilities teams to focus on essential asset data
- Implement asset data requirements, establish responsibilities of data collection, and set dates for the data deliverable
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- How to write a facilities management data specification

## Description

Have you seen a facilities management spec? What is a facilities management spec? As a facilities manager, would you like to have a say in what your data deliverable is? As a contractor, would you like to focus your owner on what matters?

What if the asset data was collected, organized, and usable before the facility opened? What if the preventative maintenance was scheduled and the maintenance records were accessible on a phone or tablet before Day One?

Our industry is producing some fantastic data, but owners are often left with none of it or an overwhelming, unusable amount of it. This class will focus on what a facilities team genuinely needs to maintain the building.

This class will give you the questions to ask, to focus on the data facilities technicians need, not the data we want to provide them. We'll also discuss the processes needed to achieve success.

## Speaker

Mark is entering his 24<sup>th</sup> year in the industry and has moved into the role of Customer Success Engineer for the Autodesk BIM 360 Ops Software. With this role, Mark will be working with customers on the successful integration of BIM 360 Ops, leading pre-sales opportunities, speaking at industry events and developing case studies with our customers.

Mark is an adjunct professor at Arizona State University on the subject of Building Commissioning and Facility Start-Up. Mark has focused on new and improved ways for a Facility Manager to maintain the operations of a building for its lifecycle.

## Sample Asset Management Questions to Ask Your Owner

These sample questions can help identify critical items to understand the needs of your client better.

### Asset Management Goals

1. Why are you looking for an asset management solution? What are your goals?
2. Do you currently have a system to track asset data?
3. How do you manage your preventive maintenance?
4. What issues do you have with your existing process?
5. How do you manage work orders today?

### Portfolio Information

1. How many buildings do you manage?
2. Are the buildings located on a single campus or dispersed?
3. Do you have a floor naming standard?
4. Do you have a room number and room name standard?
5. Do you have department categories to define different types of departments?
6. Do you have a data source that currently has this information available to download in a spreadsheet?
7. Do you have updated AutoCAD or Revit drawings that accurately represent your facility?
8. Do you want the 3D Revit geometry tied to your building assets?
9. Will you keep a Revit model up-to-date after construction is complete? What is your process to do this?
10. What is your current process to keep your building drawings and PDF's up to date with all building changes?
11. Are you interested in documenting construction using photometric scanning? Do you want pictures of what is behind a wall or above a ceiling?
12. What reports do you need?

## **Asset and Maintenance Information**

1. What is your current process for managing equipment information?
2. Do you track assets?
3. Do you have a list of assets that you would like to have maintained?
4. Do you have an asset-naming or numbering standard?
5. Do you have barcodes or QR codes on your assets?
6. What is your current work order ticketing process?
7. How do you manage and track preventive maintenance?
8. Do you have a data source with preventive maintenance checklists or protocols that can export to a spreadsheet?
9. Will you use the manufacturer's recommended maintenance procedure or the facilities best practice procedures?
10. Do you have full-time facility technicians?
11. How do your technicians access work order and asset data information on the go?
12. Do your technicians enter their notes at the end of the shift? How much time do they spend entering data in the office?
13. What percent of your maintenance is performed by outside vendors?
14. Where are your building, asset, and preventive maintenance records stored today?
15. How do you group work orders for reporting? (For example, HVAC or electrical)
16. What reports do you need?

## **Occupants and Tenants**

1. How do your occupants report issues today?
2. What if your occupants could report issues directly in the ticketing system?
3. Do you want single-sign-on for your occupants and staff?
4. Do you have a tenant management system that you want to integrate with a facility ticketing system?