

Successful procurement of FM services

Overview

This course is designed to guide buyers and managers of FM services through the process of developing a procurement strategy to meet business needs and achieve a 'best value' solution.

Participants will be shown how to determine the correct procurement strategy through profiling current services, understanding the actual service requirements and establishing the true cost of service delivery. The structure and content of service contracts and how to specify services clearly and concisely will be explained and participants will learn how to set meaningful service levels to aid performance measurement and control costs. Selection of bidders, the management of a clear tender process specific to services and winning negotiation techniques will also be explained. The interrelationship between procurement and service delivery will be explored, as will the criteria for successful mobilisation and day-to-day management.

Training objectives

This course will enhance the participants' commercial awareness and enable them to:

- Determine appropriate contract strategies
- Identify opportunities for service level improvements and cost savings
- Understand service contracts
- Manage the tender process
- Initiate contracted service provision effectively
- Manage contracts and resolve disputes

Audience

This course is intended for all those involved in the procurement of FM services, whether in the public or the private sectors, including:

- FM managers and staff
- Procurement managers and staff
- Contract managers and staff

Format

A highly interactive one-day course, with workshops and informal breakout discussions a feature of every session. Additionally, the course notes have been prepared as a real aid to inform, containing many checklists and example forms to assist participants in their workplace.

Special features

The course outline below is an indicative programme, which can easily be tailored to focus on those issues which are of particular relevance to your organisation or sector.

The supporting materials can be supplied in either printed or electronic form.

Post-course support, whereby participants can call or email the trainer direct with any questions or concerns, can also be arranged.

The expert trainer

Graham is a very experienced and senior practitioner in the facilities management arena. A Fellow of the British Institute of Facilities Managers, he is a regular speaker on public training seminars and conferences and was a major contributor to the development of the BIFM training programme. He is a member of the International Facilities Management Association (IFMA), a regular contributor to a

number of publications and a visiting lecturer to UCL, Reading University and the College of Estate Management. His practical experience was gained in the management of major building projects and later as the Head of Facilities of a national public sector organisation (where he was at the forefront of guiding the public sector in outsourcing services – including PFI – and was responsible for leading associated change management programmes), as a Group Board director of a major FM company, as Chairman of an FM consulting company and now as Director of an independent consultancy specialising in FM and PFI with clients such as Clearstream International DBG, Mitchells & Butlers and Stonemartin Corporate Centres.

Graham is a specialist in strategic reviews of support services and in procurement strategies as well as an expert in the drafting of contract documentation and bid preparation. This is one of his most popular courses.

Course outline

1 The procurement process

- Setting procurement outcomes
- Who should be involved
- Reviewing current service provision
- Service profiling
- Current cost and future budget
- Impact of business objectives

2 Contract strategy

- Determining a contract strategy
- Driving out unnecessary costs
- Setting expectations
- Culture and constraints
- Planning and control
- Contractual relationship style (partnering, alliance, etc)

3 Understanding service contracts

- Contract document structure
- Terms and conditions
- What type of specification?
- Pitfalls of supplier contracts
- How to draft service specifications
- How to structure pricing schedules

4 The tender process

- How to control the process
- Deadlines and responsibilities
- Getting the best from bidders
- Structured evaluation methods
- Understanding the price!
- Running an effective tender board
- Interviewing and negotiation techniques
- Completing the deal efficiently and effectively

5 Mobilisation

- Resourcing (client, contractor)
- Communication issues
- Establishing working relationships
- Interpreting the contract
- Setting KPIs
- Meetings and documentation
- Anticipating and resolving common problems

6 Contract management

- How to focus on strategic management
- Driving innovation
- Managing performance and costs
- Measurement made easy
- Dispute management
- Reviews, development, extensions and re-tendering
- Useful tips on managing specific services

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<http://www.in-house-training.com>

Email: info@in-house-training.com