

**Name of Project**

FM Contracts Review

**Client**

FM partner to major building society

**Contract Detail**

Multiple FM work streams

Preparation of contract schedules

**BPM Consultants**

Brian Morris

**Confidentiality Clause**

The Case Study is presented as an example of our activity and capability. Due to the nature of the commercial and trusted relationship with our clients, the names of the businesses have been removed (to protect privacy; intellectual property rights and the integrity of the innocent and the guilty alike!).

**Introduction**

BPM's client is facilities management partner to a major building society. It delivers a full range of FM services to the Society across its head office buildings and its extensive UK branch network.

Previously there were two separate FM companies providing services to the Society's Retail Network and to its Administrative buildings. These were being combined into a single contract with the FM Company. The Society had not prepared schedules of services for this new contract and various old schedules existed within documents that had been prepared at different times for the original separate contracts.

The Society and the FM Company required a single set of Service Schedules for the combined contract for the Retail and Administrative portfolios. At the same time they were taking the opportunity to review client requirements, service levels and Key Performance Indicators to ensure the new contract met the client's business objectives.

**Assignment**

BPM was engaged by the FM Company to produce a complete new set of service schedules in a new and consistent format ready for inclusion in the contract agreement. This required BPM to liaise with work stream leaders in both the FM Company and the Society to ensure all client requirements were agreed and that service delivery was achievable within the organisational and commercial set up of the contract.

Analysis of and cross referencing of services requirements, performance measures and KPIs was essential to ensure that they were included in all appropriate work streams schedules without any gaps. Tracking of source requirements, client Q&As and multiple approvals of drafts was also key to providing a quality assured and approved set of documents for the legal agreement.

**Key Achievements**

- Schedules produced for full range of facilities management services
- Client engagement throughout process minimised redrafting for final agreement
- Information management and tracking of issues provided transparency and assurance
- Client delighted with BPM performance for timeliness, quality and professionalism