



Organisational and Facilities Management Strategy Sample Tuition Workbook

BIFM Level 5 Qualifications Topic Workbook. Unit 5.02, Credit Value: 6

A chapter by chapter workbook devised to match the qualification specification requirements
Including practical exercises and qualification support and guidance notes

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Introductory Messages

How to Use this Workbook

The workbook consists of various sections, some with separate chapters, as below.

The Unit Specification

This is a section which indicates what the Awarding Organisation (the BIFM) have defined as the learning outcomes of the topic (what you will learn from the tuition) and the assessment criteria (the manner in which learners will demonstrate their topic knowledge and understanding). Learners should familiarise themselves with this as part of their studies.

The Tuition Sections and their Associated Chapters

These are devised to address one element of the study topic. Each chapter includes:

- Information that the learner must read in order to pick up a suitable level of topic knowledge.
- Exercises the learner is required to undertake. They allow learners to apply the learning in a practical way. The results and findings of these exercises often record ideas or answers which may be used in addressing the assessment paper tasks.

Learners should study each and every part of the tuition.

The Inclusion of a Bibliography

This summarises the sources of some of the information researched and used to support some of the tuition within this workbook. Learners will need to create their own bibliographies when conducting assignments if using materials produced or written by somebody else to support their own answers.

Distance Learners' Guidance

Distance learners are directed towards an additional section toward the rear of the workbook. Please read this section. Check the table of contents to help you find this.

Tutors' Review Checks

Tutors offer an insight into what learners' answers should include for each of the topics being assessed. These are devised around the type of information assessors are looking for in an answer and form the basis of the tutors' reviews of assignment work. Learners should use these as checklists of inclusions into your answers as they are prepared.

An Important Announcement

Please be aware that throughout all of the tuition materials the position of **Facilities Manager** is used as the primary job role or position. You may be a Building Services Manager, an Estates Supervisor, a Facility Co-ordinator, Office Manager, Premises Supervisor, or similar; but for reasons of simplicity the role of **Facilities Manager** is taken to mean any of the above.

Also, whilst we acknowledge the fact that many of the best Facilities Managers in the UK are women, we refer to the Facilities Manager throughout all of the tuition materials as male (using the terms **he or him**).

Therefore, whenever we state something along the lines of "The **Facilities Manager** needs to manage **his** team..." no disrespect or inconvenience is intended to those who are not male and/or those whose job title differs somewhat.

Awarding Organisation Specification Information

Subject Topic Inclusions and Learning Outcomes:

As an awarding organisation, the British Institute of Facilities Management (BIFM) offers guidance on what the topic inclusions for each subject area, or unit, should be. Along with the aims of the unit, this will be broken down into three other main areas:

1. Learning outcomes (What will be learned)
2. Assessment criteria (How learning may be demonstrated)
3. Indicative content (Associated subjects or topics the tutors may wish to include in order to further develop knowledge)

Each of the three aspects above are explained in the full tuition workbook.

So as to help learners to the best of our ability: We structure the workbook chapters to match each individual part of the specification, thus facilitating learning against the qualification requirements and expectations.

Learning Outcomes and Assessment Criteria for this Unit

The learning outcomes and associated assessment criteria are provided to learners in the full tuition workbook.

Given below is a brief, but edited version of the specification for this study unit.

Aims	
This unit enables the learners to analyse, implement, review and update the facilities management strategy based on an understanding of its relationship with organisational strategies and effectively communicate the facilities management strategy to a wide audience.	
Learning Outcomes	Assessment Criteria
1. Understand how organisations develop and review their business strategy	1.1 Explain how the business strategy is developed and put into practice 1.2 Evaluate the impact of the business strategy on the services offered by the facilities management team.
2. Understand approaches to developing facilities management strategies	2.1 Analyse the context in which facilities management services are provided and compare different approaches to developing an appropriate strategy 2.2 Analyse the relationship between organisational and facilities management strategies and the ways in which they influence each other

The full tuition workbook provides the full specification chart.

Section 1: Understanding Business Strategy Development

Chapter:

1a

Definitions and References

(Relates to A/C 1.1)

Comparing Strategies

The word **strategy** stems from a military term meaning *to gain an advantage over ones enemy*. In a business context we have to take this to mean gaining business advantages over our competitors; thus the development of long term business goals designed to increase our market standing or position within our own industry.

The term **business strategy** is commonly used by businesses, and all definitions of this term tend to look at corporate goals, developing outline plans to achieve these, initiating actions devised to achieve them, and just to keep things simple in terms of terminology a strategy is rather like creating a cunning plan to achieve your aims, so long as you know what they are.

Yet in developing this cunning plan (strategy) there has to be a relationship given to the subsequent operational ability to achieve it, such as allocating the necessary resources likely to be required at an operational level, devising policies, focus and vision for all to follow.

Strategic management, therefore, looks at the long-term business planning and visionary goals, some or all of which border on idealistic. And it is for those of us who work at an operational level to interpret those goals and ultimately define ways of converting them into manageable chunks, or operational objectives which we, as managers, can deal with.

Because facilities managers need to understand the context in which their services are to be provided, to associate these with business need and to respond accordingly, the FM function needs to have a **facilities management strategy**. Therefore using the same simplification as before; a cunning plan to make things happen in the long term in a facilities management context.

This strategy must be aligned to the business strategy so as to match their needs and achieve the necessary levels of support for the business goals over the long-term. The plans must be:

- ✓ Valid or appropriate (the right support to meet needs)
- ✓ Sufficient (achieving enough support at the right times)
- ✓ Scalable (matching ongoing, and possibly changeable, need and being flexible when or if required)
- ✓ Transferable (the ability to fulfil the strategic plans at an operational level)

The plan needs to be based on the Facilities Manager having a full and proper understanding of the business goals; including other factors such as the business intentions, its visions and its business drivers, the theme of the next chapter.



Exercise E1a(1)

Learners will be expected to present a definition of the terms **business strategy** and **facilities management strategy** when conducting the assessment for this study unit. This exercise requires learners to create their own definition of the two terms explored so far.

- i. Define, in your own words, your interpretation of what you understand is meant by the term *business strategy*. Create a definition of 60-80 words (approx).

You may be inspired by some of the phrases we used in the tuition but avoid a direct copy of the tuition materials so as to avoid plagiarism and demonstrate own topic understanding.

Use the space below to record and preparatory notes.

- ii. Define, in your own words, what is meant by the term *facilities management strategy*. Create a definition of 60-80 words (approx). As before, avoid a direct copy of the tuition materials.

Use the space below to record and preparatory notes.

Reading List:

Those who are rather more ambitious could investigate the worth of obtaining a book which the BIFM added to a preferred reading list which came out in 2006; called Exploring Corporate Strategy, written by Gerry Johnson, Kevan Scholes and Richard Whittington, published by Prentice hall, ISBN-10: 0-273-71017-6. Obtaining this book is not compulsory but for those with the budget to invest in business development books it may be worth seeking out.

How Strategic Planning Differs to Operational Planning

In order to clarify an associated subject we shall spend a moment looking at the difference between **strategic planning** and an **operational planning**.

Strategic plans are those concerned with looking to the future; working towards goals and visions and ensuring long-term planning is assured as well as there being suitable provision for its management. The (BIFM qualification) **Level 5** managers are involved more with this aspect of planning than they are operational planning.

Operational plans are those concerned with ensuring objectives are met, everyday work activities are conducted effectively and workload is organised and thereafter managed. The (BIFM qualification) **Level 4** managers are involved more with this aspect of planning than they are strategic planning.

Review of the Exercise on the Previous Page

The exercise as given on the previous page was conducted in one of Blue-Eye Training's tuition workshops by a pair of learners and in a four-minute time frame they came up with the following definition:

A business strategy is the concept of having a full understanding of the company's long term needs and the further understanding on how this will assist in putting it in an advantageous business position. This vision must be supported by a long term plan or direction and the analysis of what may be needed to get there in terms of resource provision and business planning. This needs to be supported by sharing the vision, the focus and direction with the full management team so as to gain their assistance and involvement to help make it work.

We need to point out that the definition above is not perfect but shows what can be achieved in just a short time frame.

The reason we are including this is to show that the exercise, when properly conducted, will allow you to develop a full and proper understanding of the topic.

The exercise as given on the previous page was conducted in one of Blue-Eye Training's tuition workshops by a pair of learners and in a four-minute time frame they came up with the following definition:

A cunning plan to support what the organisation wants, or requires, in the long term.

We have to be aware of what drives the company and their business plans and therefore what subsequently influences or drives our plan.

Our strategy requires us to understand the visionary goals and break these into manageable chunks (or objectives) which also have long-term benefits; each of which will have measurable points of success.

We need to point out that the definition above is not perfect but shows what can be achieved in just a short time frame.

The reason we are including this is to show that the exercise, when properly conducted, will allow you to develop a full and proper understanding of the topic.

Introduction

In order to look at the creation of a business strategy, we need to look at two key components:

1. The **objectives** that underpin our intentions (**goals**)
2. What **drives** or influences it

The two elements above are expanded upon in their own topic areas, below.

Component 1: Objectives and Goals

Before exploring this element of the topic we would like to firstly expand upon two terms we shall use regularly throughout this, and other, workbooks: **Goals** and **Objectives**.

Goals

The term **goals** is given to the long term intentions of an organisation, which may or may not be quite idealistic, visionary and, in some ways, hard to ascertain how they may be achieved. Goals tend to reflect the intention of a business and may be somewhat undefined or challenging. Examples of these may include:

- To become the best company in the industry
- To expand our saleable product range
- To provide the best level of support services as is possible to our clients

The last of the three is where business goals overlap with goals relating to FM services and provision.

Learner's exercise LE1b(1)

As an introductory exercise, and something learners could use at other times to relate to other topics in this workbook, learners should conduct this exercise.

Decide upon three other business goals for your organisation (whether or not they are actual goals, or ones made up just for the exercise, it does not matter). Give an outline indication of how you think the company could achieve this goal.

An example has been given, under each heading so as to show you the type of thing we are looking for you to create.

An example goal (to demonstrate what we would like you to achieve on the next page):

To become the best company in the industry

What you think your company could do to help achieve this (our example ideas):

Develop a customer-focused reputation that we offer the best value for money, the fastest turn-around time for the provision of the (products or) services, and to have a dedicated after sales account manager to always look after clients' future needs.

Your first example goal:
What you think your company could do to help achieve this:
Your second example goal:
What you think your company could do to help achieve this:
Your third example goal:
What you think your company could do to help achieve this:

Indicative Examples

At the end of the chapter we provide two fictional organisations' goals, along with an outline strategic plan and an insight into the drivers which influenced their thought process.

Objectives (Edited version from the full tuition workbook)

We apply the term **objectives** to the conversion of the goals into manageable chunks with a long-term perspective against which we can develop workable plans, so as:

- To identify the business intentions and define them in such a way as they may be
 - Understood by all
 - Converted into standalone achievements, each of which will contribute to the attainment of the goals, however visionary
- To formulate targets and measurable points of success
 - So as to know when achievement has been met
 - To have something to measure and report upon to members of the higher management levels
- To ensure they are realistic and will genuinely lead to the attainment of the goal
 - This ensures their relevance and
 - Helps achieve the desired output
- To help formulate a timeline of when each will be required
 - The objectives may be part of a programme where one thing has to be achieved before another may start or be undertaken
 - The timeline may aid reporting of the progress being made

Sample Level 5 Tuition Workbook (Edited)

This is an edited copy of the Unit 5.02 workbook as written by [Blue-Eye Training](#) tutors. Enquire [here](#) to gain access to our tuition programmes.

Other Topics Included in this Chapter

Tuition on:

- What Drives a Strategy (Component 2)
- Business Direction
- Vision
- The Mission Statement
- Values and Company Culture
- Policies
- SWOT Analysis
- External Influences and Risks (PESTLE Analysis)

An exercise for learners to:

- Investigate strategy drivers within their own workplace

Tuition on:

- Additional influences and considerations

An exercise for learners to:

- Summarise their understanding of how business strategy is developed

Tuition on:

- Measurable points of success (Component 3)
- Project Management and how this relates to strategic planning and direction

Other Chapters in this Section of the Workbook:

Chapter 1c: Business Strategy Impacting Upon Services
(Relates to A/C 1.2)

Section revision exercises. Learners complete these and send notes to tutors as part of their learning plans

Section 2: The Facilities Management Strategy

Chapters in this Section of the Workbook:

Chapter 2a: Developing an Appropriate FM Strategy
(Relates to A/C 2.1)

Chapter 2b: Strategy Relationships
(Relates to A/C 2.2)

Section revision exercises. Learners complete these and send notes to tutors as part of their learning plans

Section 3: Implementation of Example FM Strategies

Chapter 3a: Development of an Example Strategy
(Relates to A/C 3.1)

Chapter 3b: Implementation of the Example Strategy
(Relates to A/C 3.2)

Section revision exercises. Learners complete these and send notes to tutors as part of their learning plans

Section 4: Evaluation, Review and Managing Necessary Change

Chapter 4a: Evaluation and Review Techniques
(Relates to A/C 4.1)

Chapter 4b: Causes to Effect Change to the FM Strategy
(Relates to A/C 4.2)

Section revision exercises. Learners complete these and send notes to tutors as part of their learning plans

Section 5: Communicating Strategies

Chapter 5a: Identifying those who Need to Know about the Strategy
(Relates to A/C 4.1)

Chapter 5b: Methods of Communicating Strategy Information to the Target Audience
(Relates to A/C 4.2)

Section revision exercises. Learners complete these and send notes to tutors as part of their learning plans

Other Sections of the Workbook:

Bibliography

Assessment Support and Technique

Training Session Evaluation Feedback Sheet (Workshop Attendees Only)

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