



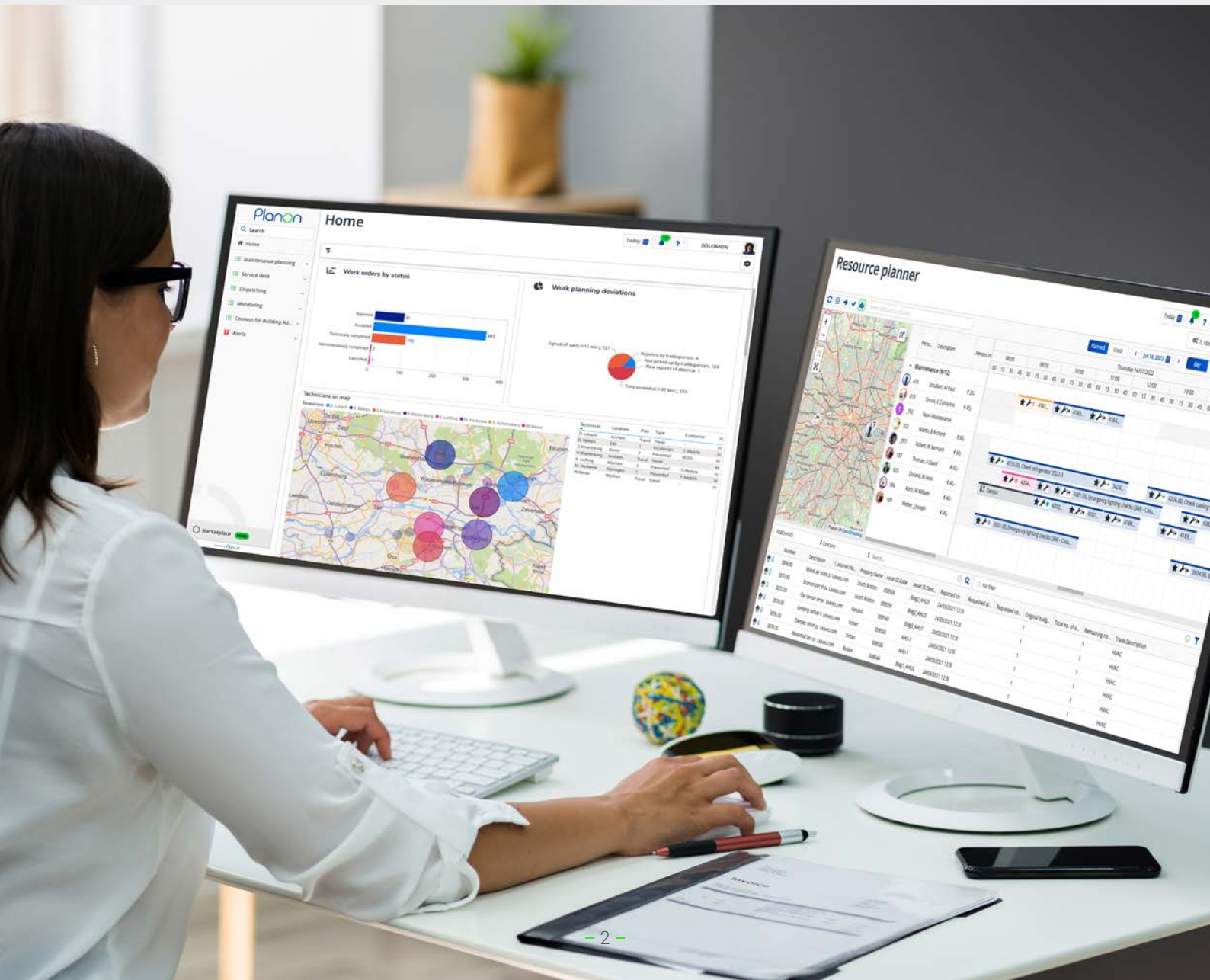
## **Roundtable Discussion ‘Meeting Industry Demands Through Technology’**

## Key Findings from a virtual roundtable series

In a changing and growing Integrated Facility Management (IFM) outsourcing market, customers expect high-quality, people-centric, and performance-based delivery of facility services. To meet these increasing demands, facility service providers will need a smarter, more experience-focused, approach to service delivery.

In light of this development, Planon is hosting a series of exclusive roundtable discussions to gather insights from industry experts on the role that technology can play in the evolution of FM services in various markets. The goal is to share thoughts on the macro-level forces that are affecting the industry. We begin with two sessions, focusing on the North American (NAM) and Nordic markets respectively, analysing how the FM market is changing in these two regions.

Today, facility service providers have access to a range of both new and mature technologies that enable them to quickly and cost-effectively collect, analyse, visualise and act on facility, asset, and human-centred data. We hope that by discussing the FM sector's engagement with these technologies, we can help further the movement toward more sustainable, productive, and resilient services that drive competitive advantage among our clients.



# Virtual Roundtable Discussion NORTH AMERICAN Market

## Who hosted the virtual roundtable?



**Chas Harris** is the Business Development Manager for the North American region at Planon. He is responsible for the sales and marketing of technical products, as well as complex managed services. He has a passion for creating winning partnerships and developing winning teams.

## Who participated?

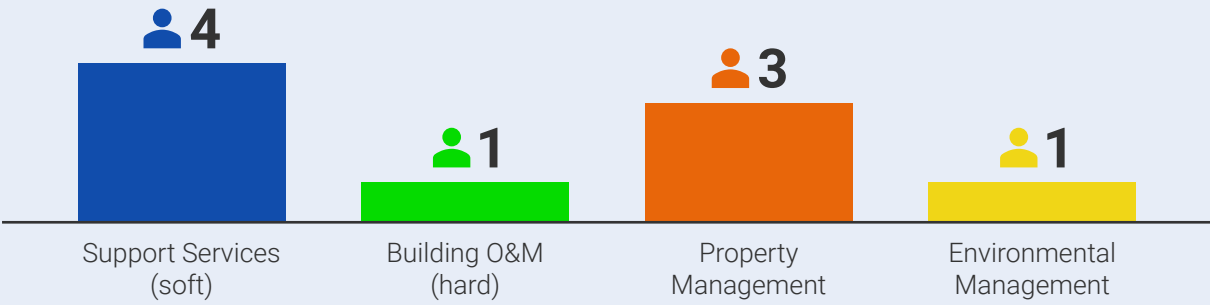
- **Linda White** is the Senior Vice President for technology services at Colliers International. She has a history of managing global technology platforms and complex integrated solutions. She has extensive knowledge of current technology offerings within the commercial real estate industry, combined with strong consulting professional skills in Business Process, Requirements Analysis, Enterprise Architecture, Business Process Improvement, and Sales Operations.
- **Alexandre Gareau** is the Director of maintenance and asset optimisation at GDI Services Techniques. His role involves the planning, development, and selling of services within his business unit, as well as the supervision of relevant personnel to ensure that management plans, preventive maintenance and project completion are all carried out.
- **John Galbraith** is the Sales and Marketing Manager for facility management services at Gilbane Building Company. As an award-winning communication professional with more than 30 years of experience leading sales and marketing-communications programmes for facilities management, software technology and IT Solution Integration companies, John understands how FM impacts both the physical assets of a property as well as employee performance.
- **Luis Masías** is Business Developer at Confipetrol Andina. He boasts a wealth of experience directing and generating value in the areas of FM, occupational safety, logistics, management control and real estate. He has a master's degree in Business Administration and has enjoyed a long career leading multidisciplinary teams with a focus on results and continuous improvement.

# Statement 1:

*'In North America, the IFM market will grow from \$37 billion (2019) to \$55 billion (2026). In what service sphere do you anticipate the biggest revenue growth for your company?'*

## Results:

*In response to each statement, our roundtable participants chose from a series of pre-selected answers.*



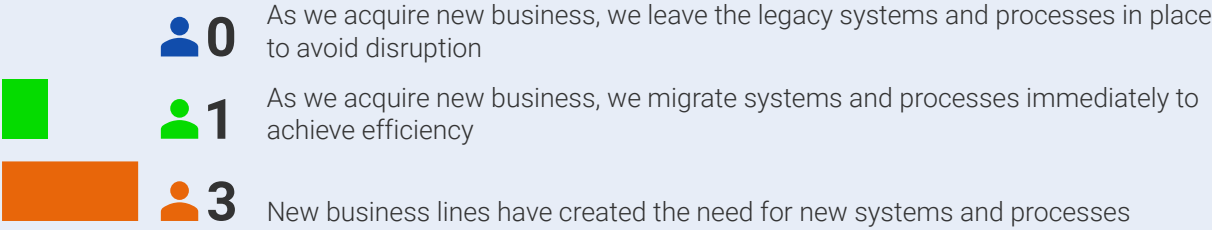
**Linda White:** I think clients are looking for guidance in the support services space to help them with the technological transition. Many of them haven't had to figure out certain initiatives that are now coming to the fore programmatically. For example, how do you create a sustainability programme in the IFM space? How do you reduce your carbon footprint? What should you be measuring? Clients are seeking consulting and soft services to guide them.

**John Galbraith:** Echoing what Linda said, we are seeing a lot of clients that haven't really dipped their toes in technological waters until now. There's a realisation that soft services, like consulting, will help clients understand how to best approach topics like sustainability. It's an interesting time for the market and we're seeing the demographics in the industry changing to reflect that.

# Statement 2:

*'As IFM business models become more complex due to expansion and diversification, how are your processes changing to accommodate growth?'*

## Results:



**Linda White:** I was torn with my response because if you look at companies that are growing and trying to manage new programmes, they aren't wholly satisfied with their legacy tools but neither do they go out and buy new technology straight away. There's a lot of planning that is needed to determine the right trajectory. I have some clients that are still running things through Excel! They will eventually acquire new technology but it's not immediate.

**Alexandre Gareau:** When we wait too long, it can become difficult to integrate different tools. It is good to evaluate technological developments,

but when it takes, say, two years, to merge solutions, things become complicated. It takes time to understand what new systems and processes are needed but when something is decided, things should move rather quickly. The influence of plug-and-play consumer technology could be at work here.

**Luis Masía:** In our case, it is very important to develop a new platform – that's why we contacted Planon. In order to develop new FM business lines, we needed another platform and dashboard to help us manage interactions with the customer, the planning and operations, and the information related to service delivery.

# Statement 3:

*'As our industry is experiencing an exodus in talent, what are some ways you are bridging the gap and attracting the next generation of FM leaders?'*

## Results:



We have learned to do more work with fewer people



We have worked to retain some of our would-be retirees



We have found some innovative ways to attract new talent to the industry



We are subcontracting out more of our work

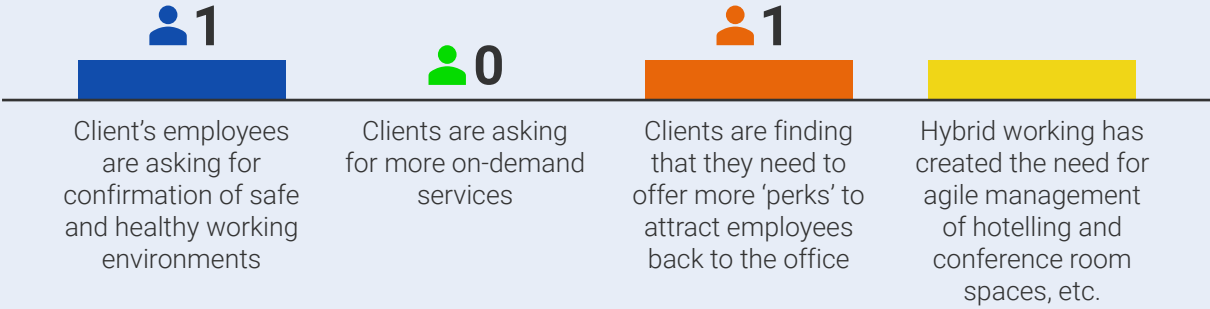
**John Galbraith:** It's becoming clear that staff are overworked, budgets are lacking, and FM service providers need to be as efficient as they can. So, doing more with less, utilising building automation capabilities, and having a platform that allows you to supervise services remotely are all key. We're trying to empower our customers – and technology is a great way to achieve this – for example, with more self-services. At the same time, we need to be more resource efficient and support employee wellbeing, so they don't burn out.

**Linda White:** It's interesting that no one selected, 'We have found some innovative ways to attract new talent to the industry.' I don't think there's much we can do from an FM perspective to make the career more attractive – no one dreams of changing lightbulbs. But if we can take a technology-first approach and focus more on software, so talent see the industry as one where they are situated behind the scenes operating robots or programmes, we might have a bit more success in recruiting college graduates.

# Statement 4:

*'How are the customer satisfaction demands of your clients changing with respect to end-user engagement post-pandemic?'*

## Results:



**Alexandre Gareau:** We have to prove to our clients that we have completed the service we've been tasked with, such as replacing an air filter. This must be on-demand too. We build a report and extract all the necessary information so we can present this to the client as confirmation. This has always been asked for, but it's reached a new level of importance post-pandemic. We also use a mobile app so that when we close a work order, we can access validation and accountability for the worker and their supervisor.

**Linda White:** All of my clients are also occupiers, so they have a lot of office space. Many are still trying to manage the transition to hybrid working but the more important part is finding a way to attract people back to the office.







Businesses want to transform their spaces so they're engaging and able to entice people back into the office. Technology can play a role here. What tech can you offer that makes office space more functional without excluding individuals that are continuing to work remotely.

**Chas Harris:** This ties into the emergence of 'total experience' – a worker being able to use their mobile phone to secure resources before they even step into the office. That's one way of enticing people back as it's about providing an enhanced office experience.

# Statement 5:

*'Does your organisation have a sustainability strategy? How do you see your company contributing to your client's sustainability goals?'*

## Results:

-   **1** Our sustainability strategy has been implemented to reflect good stewardship to clients and employees
-   **2** Our sustainability activities are primarily in support of our client's sustainability objectives
-  **0** Our day-to-day operations at the client site promote sustainability but the impact is not measured or reported
-  **0** Increase in customer retention & satisfaction

**John Galbraith:** The construction part of the Gilbane Building Company has recently come out with an ESG initiative because we realise that it is crucial, we do everything within our means in the construction sector to comply with the with the highest environmental, social and governance standards. Our customers are looking for these kinds of standards, too.

**Linda White:** Most of our sustainability activities remain in their infancy, so our clients often take the lead here. We do have an internal team working in this area, but we haven't seen much progression outside of diversity and inclusion measures. Day-to-day, the client's sustainability objectives are still leading the way.



# Virtual Roundtable Discussion NORDICS Market



## Who hosted the virtual roundtable?



**Tom Ryckaert** is responsible for Global Business Development at Planon for the service provider market. He has a strong background and significant experience in this market with a focus on IFM contracts (both soft and hard services). His main ambitions are to set up a strong network, facilitate knowledge sharing and focus on being a trusted advisor for organisations looking to find the right technology and software solutions to achieve their objectives.



**Nush Cekdemir** is the International Sales Director at Planon. He has extensive experience in strategic sales management concerning new and disruptive technology solutions and in translating these into strategic business needs. Nush has a deep understanding of the customer's IFM business, using this to truly challenge them and give advice on how their company can compete more effectively.



**Kati Barklund** is the President of IFMA Sweden and co-host for this session. She is passionate about using engagement and empowerment to unlock workplace potential. She believes that making work more inspiring and meaningful will lead to the creation of happy, healthy, engaged and empowered people, who in turn will create more value for their organisations, society and the planet.

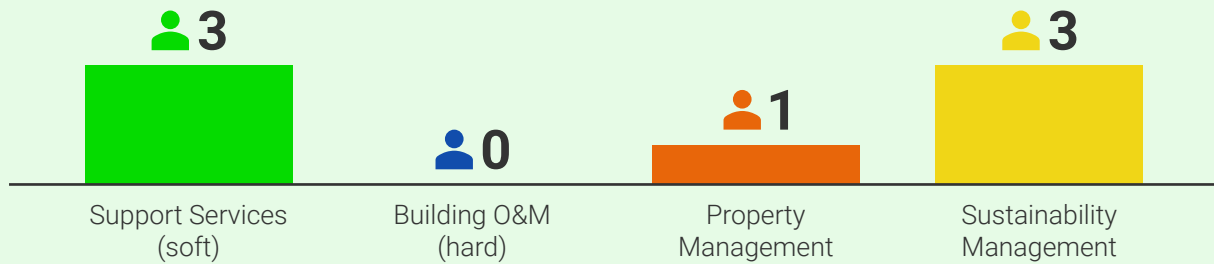
## Who participated?

- **Ola Hernström** is the Product manager Support and Real Estate Services at Samhall AB. He has almost two decades of experience in the FM market, having worked previously at ISS Facility Services, Ahrsjö & Partners Facilities Management Consulting, and Compass Group. He is skilled in-service delivery for a range of business sectors.
- **Antti Pitkanen** is a Board Member at IFMA Finland. He is a design leader with almost 20 years of professional experience in leading multidisciplinary design projects through collaborative networks from strategy to implementation in the areas of spatial, product, brand and service design. He contributes to IFMA Finland's mission to develop the country's FM environment and education.
- **Niklas Rosvall** is a Business Developer at Caverion. He is passionate about boosting, operational excellence and customer experiences at the company and is currently responsible for business and operational development, as well as tender management and design.
- **Henrik Jarleskog** is the Head of Strategy at Sodexo. He has a track record of creating growth and profitable businesses in global markets. His proven leadership, with its focus on transformation, development, and organisational re-design, has been displayed at various organisations, including EuroFM, IFMA, EY and many others.

# Statement 1:

*'For Europe, the growth in IFM is estimated at €8.3 billion through 2026. In what service domain do you see the highest growth for your organisation?'*

## Results:



**Henrik Jarleskog:** I selected 'Support Services (soft)', although I did consider opting for 'Sustainability Management' as we see that sustainability is part of all our clients' needs. Within support services also comes food, refreshment, and everything that is needed to make an office into a magnet. Support services will create a rebound effect in getting people back to the office.

**Ola Hernström:** Support services, of course, represent 90% of what we do in our company, so for obvious reasons, this is the area where we want to see continued growth. Having said that, we also work a lot with circular services, both in the laundry service that we have and in the soft-hard service business, where we are repairing things for customers.

**Niklas Rosvall:** I voted for 'Sustainability Management,' with energy advisories being a growing demand – as well as how this can be combined with hard FM services. The core driver behind sustainability and energy management is still cost, at least in our energy projects.

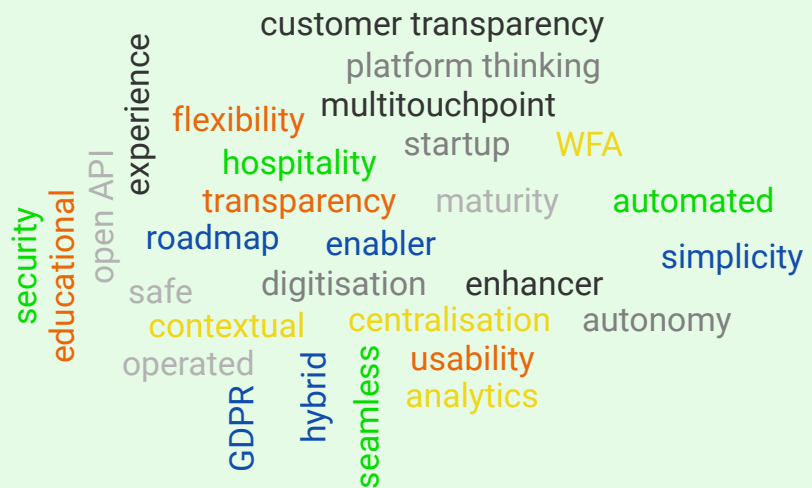
**Antti Pitkanen:** You can look from different angles. In the past workplace strategy in an office environment was clear. Nowadays decisions regarding work place strategy has to involve different stakeholders like FM, IT and HR. The workplace lost the monopoly on work. Customer Experience and Total Experience are gaining on importance linked to the services needed to achieve this. We're in a continuous change.

## Statement 2:

*'What do you understand as technology integration in the daily FM service provider environment?'*

### Results:

For this statement, the roundtable participants were asked to generate a word cloud:



**Antti Pitkanen:** I wrote 'seamless,' thinking of how it relates to experience. It's about a technological multi-touchpoint approach looking from the user perspective in a complex environment. How can we create benefits for users with technology? It means creating an experience that is contextual and integrates the physical, digital, and social requirements of the user. This relates a lot to 'usability' as well. We are accustomed to adding more and more features to technology, but how can we make software simple enough that it provides value at the right time and place?

**Henrik Jarleskog:** I contributed the word, 'hybrid,' because I do think that this is the focus of technology at this point in time. Everyone knows what has happened in the last two-and-a-half years and we have greatly accelerated digitalisation over this period.

**Kati Barklund:** I added 'platform thinking' because it is so important that we choose a

platform that can cover as much as possible but also has the flexibility to develop new solutions. I also provided the terms, 'enabler' and 'enhancer' because technology can be both of these things – not only in terms of the experience but also the toolbox for employees.

**Henrik Jarleskog:** Being able to operate services in a digital way. It's all about data and what to do with it.

**Niklas Rosvall:** Transparency is gaining on value as many employees are working in a hybrid decentralised environment.

**Ola Hernström:** I agree with previous mentioned points. Our specific business is different as we're working with people with a distance to the labour market. We want to go for simplicity and education as our key drivers. We want to get our employees to be active in the regular labour market.

## Statement 3:

*'The hybrid way of working is the new norm. How is this affecting service delivery for your customers?'*

### Results:



Customers reduce m<sup>2</sup> and related services



A higher demand for qualitative services with a focus on hospitality



An agile service delivery based on occupancy rates



FM is back to basics and seen as a cost-driver

**Niklas Rosvall:** We have a lot of customers in the industry and manufacturing market. There we need to focus on quality and sustainability.

**Antti Pitkanen:** Both qualitative services and a hospitality focus are both really important – they can lead to the creation of a 'total experience'. We have conducted a lot of research on the return to the office and the challenges around hybrid work. We asked one of our designers when she would like to come to the office and she replied, 'when something fun is happening.'

The aspects of fun, wellbeing, and belonging are hugely important when formulating the hybrid workplace.

**Kati Barklund:** With our customers, there has been a reduction in office space but also a focus on tailored solutions – looking at different needs from a departmental, unit or role perspective. It needs to be a tailored solution matching the different roles in the organisation. You don't need to increase the TCO (total cost of ownership)- but optimise this and focus on ESG.

## Statement 4:

*'The market is demanding more sustainable services. How is your organisation implementing this change?'*

### Results:



Engagement programmes for (customer) employees to create awareness of sustainability



Implement more efficient ways of working by using AI and sensoring to reduce our emissions and waste



Benchmark energy consumption of assets to provide insights to customers



Develop new services that help to achieve sustainability goals of customers

**Henrik Jarleskog:** I think this is a topic where we need to be as pragmatic as possible. Most of the current sustainability agenda is influenced by the United Nations SDGs. This is an area where service providers need to understand how we can influence these goals alongside the client. Having said that, investing in new services is essential. I think most industries are looking at ways we can use new services to accelerate these goals. E.g. Hospitality services, food and reduce waste flows. Reduce carbon footprint of our own fleet.

**Ola Hernström:** Of course, everyone needs to work with customers and employees on sustainability – all the time. Looking at the development of new services, we work within

the circular economy, especially within our laundry and textile businesses where we see much more demand for repairing and recycling clothes and furniture. There is a drive to look at both old and new services to meet future sustainability demands.

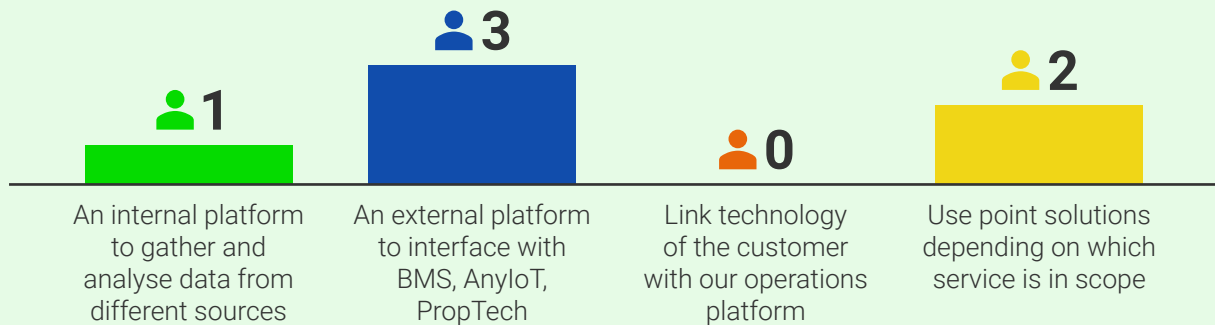
**Kati Barklund:** All projects have a link towards sustainability. It's a way to integrate this in the core values of the organisation and create prouddness with its employees.

**Antti Pitkanen:** The communication aspect and taking pride in sustainability initiatives is important, as it looks at the entire life cycle of facilities. We also need to modify and support a behavioural change that helps the green agenda.

## Statement 5:

*'PropTech/IoT will play a huge role in (hyper) automation of operational processes. What do you see as the ideal strategy for connecting PropTech/ IoT?'*

### Results:



**Niklas Rosvall:** Obviously a platform combined with data is critical for our business, as is continuing to develop and improve our IT. We have a lot of PropTech solutions, but we need to create value from them. We need to start with the processes, ways of working, and organisational development.

**Nush Cekdemir:** The reason why hyper-automation is a rapidly developing trend is that when accessing so many data sources, there is a question of what to do with the data. It can drive you crazy trying to collect data, combine it with other sources, and find out what to do with it.

**Ola Hernström:** We have a lot of specialised solutions for very specialised services, but we are moving towards more platform-based solutions. There will probably be a combination of internal and external tools, depending on what services are needed.

**Kati Barklund:** I strongly believe that we need to start moving towards more external platforms – very carefully working with data management. In the long run, it will be very difficult to have internal platforms – particularly for smaller organisations.

**Antti Pitkanen:** At World Workplace Europe '22 in Amsterdam, I visited the Edge building. They've a lot of IoT/PropTech in this multitenant environment. It needs to be involved in an early stage when looking at the renovation of buildings.

**Tom Ryckaert:** I believe discussions about data need to start with the construction of your building and consider building owners, occupiers and, of course, cost.

## Key conclusions

*Over the course of these discussions there were some commonalities that stood out and some diverging themes within overarching trends. While everyone agrees that there are many global trends impacting the FM services industry, not all trends are prioritised in the same way. The following key conclusions seek to identify the trends impacting the NAM and Nordic markets, how technology fits into the solution narratives, and the level of importance placed on different trends in each market.*

**1 Sustainability** is becoming an increasingly important trend within the FM sector, although it is still largely driven by client goals. Many clients are requesting support from their service provider on this topic, which can range from looking at how it applies to soft services in the NAM market to its implications across energy management, hard services, and resource circularity in the Nordics. So FM service providers, in both the NAM and the Nordics, need to better understand what solutions are available and how they can contribute towards meeting internal and external ESG goals.

**2 Hybrid working models** are impacting service delivery across the globe. As businesses look to encourage workers back to the office, it is apparent in both the NAM and Nordic markets that it is important to consider what employees are looking for and how to best prove that in-demand services are carried out. Hospitality-like services are set to become increasingly important in creating the 'total experience' that workers expect in the Nordics. While in the NAM market FM service providers are being asked to identify office amenities that can be used to attract talent back to the office.

**3** In a hybrid workplace, across both markets, the FM should serve as a collaborative custodian of **workplace experiences** by helping clients to provide the environment that is most appealing to their employees. Whether that environment includes the providing new amenities or the same amenities provided with a higher level of service, will depend on the client and the region.



**4** The FM market has to be inventive to mitigate the **impact of workforce constraints**. One way is to implement new technologies like IoT sensors to improve workforce capacity and efficiency while promoting the industry as being tech-forward to incentivise new entrants. The key will be to understand the technology maturity of the FM services client and to collaborate with them to identify and introduce solutions that best align with their objectives and comfort level.

**5** The need for additional consulting, identified in both markets, underlines the fact that it can take time to decide on the right way to move forward with technological innovations but once a decision is made, fast implementation is expected. This reinforces the need for an **Open Application Platform** that accelerates implementation.

**6** A platform solution, combined with a rich source of data, can greatly improve FM services but being able to manage the complexity of this data is a challenge. That's why **hyperautomation** is such a rapidly developing trend as it can automate processes in a holistic manner, integrating and analysing FM data from a multitude of sources. FM service providers seeking to benefit from hyperautomation will need to understand how it can best benefit existing or new processes. For example, if you are still manually collecting data, data capture automation may be the best place to start.

**7** Across both the NAM and Nordic markets it's clear that **technology** shouldn't be considered solely based on cost, but also on its ability to add value. The client's experience of the built environment and technology's ability to improve service delivery and resource efficiency for FM service providers is key. Technology is not a goal on its own.

## What is next?

Are you working for an FM service provider, and would you like to share your unique insights about where the industry is headed in the years to come? Your input could be very valuable!

Please let us know if you would consider participating in a future event as one of the industry experts within our Planon community.

Would you like to explore additional resources we already have for (I)FM service providers? [Please visit Planon's resource centre.](#)





# About Planon

Planon is the leading global provider of Smart Sustainable Building Management software that connects buildings, people and processes. By eliminating data silos and aligning solutions into one shared information platform, Planon provides all building stakeholders with actionable and meaningful insights. Independent market research and consulting firms have consistently rated Planon as a global leader in the market. Planon has implemented its comprehensive solutions for more than 2,500 clients, supported by offices and partners around the world.

For more information please visit us at [planonsoftware.com](https://planonsoftware.com)

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