

KOENIG SOLUTIONS • COURSE OUTLINE

Facility Management Professional

Learn to plan, manage and control FM finance, procurement, strategy, operations and projects to meet organizational requirements.

5 Days

DURATION

59

TOPICS

COURSE OVERVIEW

To equip facility management professionals with the financial, business, leadership, strategic, operations and maintenance, and project management knowledge required to plan, manage, control and continuously improve FM services and projects in alignment with organizational requirements.

WHO THIS COURSE IS FOR

Facility managers, FM professionals, operations and maintenance managers, workplace and property professionals, project managers, engineering and technical managers, procurement and contract professionals, and professionals responsible for FM budgets, service delivery, vendors, assets, teams or strategic planning

What You Will Learn

- Explain key finance and business concepts relevant to facility management and manage FM budgets using appropriate financial information
- Interpret basic financial statements, cost behaviour and chargeback approaches and identify opportunities for cost containment
- Develop financially supported FM business cases and determine relevant information for management decisions
- Apply procurement, sourcing, outsourcing and contract-management principles while monitoring performance and managing contractual risk
- Develop and assess FM strategic plans aligned with organizational requirements, supported by appropriate metrics and tactical plans
- Apply leadership, change-management, stakeholder-management, team-management and ethical practices to strengthen FM performance
- Plan and manage operations and maintenance activities across facilities, assets, occupant services, SLAs and contractors
- Apply asset life-cycle, commissioning, reliability-centered maintenance and performance-monitoring concepts to FM operations
- Plan, execute, control and close FM projects using structured project management processes, controls and documentation
- Evaluate project and service outcomes, resolve issues and capture lessons learned to support continual improvement in facility management

59 Topics

DAY 1**Finance & Business – Financial Management and Business Cases****TOPICS**

- **Finance and Business Awareness:** Understand the importance of financial and business awareness and the key terminology used in facility management
- **Basic Accounting Principles and Practices:** Review accounting fundamentals that provide the foundation for effective FM financial operations
- **FM Budget Development and Management:** Develop, recommend and manage FM budgets in line with organizational priorities and operating requirements
- **Financial Statements:** Identify and interpret the basic financial statements prepared by an FM organization
- **Financial Impact of FM Operations:** Recognize the operational and financial elements affected by facility management decisions and activities
- **Cost Concepts and Cost Behavior:** Understand fundamental cost concepts and how costs respond to business changes and activity levels
- **Cost Containment Opportunities:** Identify practical opportunities to control, reduce and optimize FM-related costs
- **Chargebacks and Cost Allocation:** Explain how chargebacks can be used to allocate facility costs across services, departments or users
- **Business Cases:** Develop well-documented business cases and identify the relevant financial data required to support recommendations

DAY 2**Finance & Business – Procurement, Sourcing and Contracts****TOPICS**

- **Procurement Principles and Procedures:** Apply procurement principles and procedures in accordance with demand-organization policies and guidelines
- **Sourcing and Outsourcing:** Determine sourcing needs and implement appropriate outsourcing standards within the FM organization
- **FM Contract Development and Oversight:** Understand the principles involved in developing, administering and overseeing facility management contracts
- **Contract Administration and Performance Monitoring:** Establish approaches for administering contracts and monitoring supplier performance against requirements
- **Contract Analysis and Risk Management:** Analyze contract elements, identify contractual risks and apply appropriate risk-management approaches
- **Vendor Conflict Resolution:** Address and resolve conflicts with vendors through structured communication and practical resolution approaches

TOPICS

- **Strategic Planning in FM:** Explain the importance and objectives of strategic planning and align FM requirements with demand-organization needs
- **Strategic Planning Tools and Frameworks:** Use strategic planning tools and frameworks to develop, assess and maintain an FM strategic plan
- **Internal and External Environment:** Monitor internal and external factors that may influence facility management strategy and performance
- **FM Strategic and Tactical Plans:** Create an FM strategic plan and establish the basis for tactical plans, approval and funding
- **Performance Requirements and Metrics:** Define performance requirements and metrics to evaluate whether FM objectives are being achieved
- **Leadership and Management:** Differentiate leadership and management roles and understand how leadership approaches influence workplace performance
- **Individual Behaviour and Leadership Styles:** Apply behavioural concepts and adapt leadership styles to different workplace situations
- **Change Management:** Apply change management principles to support adoption of FM projects and organizational changes
- **FM Advocacy:** Advocate for facility management needs, priorities and value within the wider organization
- **Teams and Organizational Structure:** Understand team roles and apply management principles and organizational structures that support strong FM performance
- **FM Policies, Procedures and Practices:** Support robust FM policies, procedures and practices that effectively meet demand-organization requirements
- **Responsibilities and Accountability:** Use job design, work coordination and responsibility tools to clarify accountability for staff and contractors
- **Conflict Resolution and Principled Negotiation:** Identify root causes of conflict and apply structured negotiation approaches to reach workable outcomes
- **Ethical Leadership and Code of Conduct:** Promote ethical behaviour by modelling, communicating and enforcing appropriate codes of conduct
- **Stakeholder Relationship Management:** Develop effective stakeholder relationships while remaining sensitive to differing stakeholder needs and expectations

TOPICS

- **Role of Operations and Maintenance:** Explain the role of operations and maintenance within the overall facility management function
- **FM Strategic and O&M Tactical Planning:** Translate the FM strategic plan into practical operations and maintenance tactical plans
- **Facility and Asset Deficiencies:** Identify deficiencies in structures, exteriors, systems, interiors and grounds and consider related health, safety, security and environmental impacts
- **Asset Life Cycle and Acquisition:** Understand when an asset life cycle begins and evaluate key factors influencing acquisition decisions
- **Asset Installation, Commissioning and Integration:** Explain how assets are commissioned, integrated and documented and why user and maintenance training is important
- **Reliability-Centered Maintenance:** Describe how Reliability-Centered Maintenance supports balanced maintenance decisions and effective asset performance
- **FM Information Systems:** Understand the role of FM information systems in supporting maintenance activities, records and decisions
- **Occupant Services:** Describe occupant services and the factors used to define service expectations
- **Occupant Service Performance:** Establish guidelines for occupant service performance and prepare effectively for service modifications
- **Customer Satisfaction:** Compare approaches for monitoring, measuring and improving customer satisfaction
- **Service Level Agreements:** Understand the elements, value and practical use of service level agreements in FM service delivery
- **Contractor Selection:** Compare contractor capabilities and select appropriate resources based on service requirements
- **SLA Discussion and Agreement:** Explain the discussion process used to establish and agree service level expectations
- **Competency and Performance Measurement:** Measure competency, monitor performance and evaluate work and service outcomes
- **Contract Disputes and Resolution:** Recognize key factors and attitudes that influence contract disputes and their resolution

TOPICS

- **FM Projects and Project Management:** Describe project attributes, common FM projects and the purpose of project management
- **Project Manager vs. Facility Manager:** Clarify the respective roles and responsibilities of project and facility managers in an FM project.
- **Project Management Processes and Cycles:** Relate project management processes, knowledge areas and project cycles to a practical FM project format
- **Project Initiation:** Explain the Initiate phase, including its inputs, tools, outputs and key activities
- **Project Purpose and Success Criteria:** Define the project purpose statement and measurable criteria for determining project success
- **Statement of Requirements:** Perform programming steps needed to develop a clear statement of requirements
- **Project Charter:** Explain how the project charter supports project approval, governance and funding
- **Objectives, Scope and Deliverables:** Develop project objectives that clearly define scope, deliverables and constraints
- **Site Selection and Design Process:** Outline the typical site-selection process and progressive stages of design
- **Project Management Plan:** Identify the components of a project management plan and the methods and tools used to develop it
- **Resource and Procurement Acquisition:** Acquire internal or contracted resources, materials and professional services through appropriate tendering or negotiation
- **Project Execution and Control:** Execute and control scope, schedule, cost, quality, resources, communications, risks and changes against the project plan
- **Final Deliverable Review:** Conduct final reviews and verify that agreed project tasks and deliverables have been completed
- **Project and Contract Closure:** Complete project and contract closure and capture lessons from project outcomes, successes and failures

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

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1-on-1 Training

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