



CAFM system

Procurement playbook

Introduction

A CAFM system helps Estates and Facilities Management (FM) teams manage assets, maintenance, space, compliance, helpdesks, and more. Procuring such a system requires a strategic approach, clear requirements, and stakeholder engagement to ensure it delivers value.

Phase one: discovery and planning

Establish the project team

- **Roles:** Project Lead (Estates), IT, Procurement, Finance, Legal, and end-users (FM staff, H&S, etc)
- Appoint a **CAFM Champion** to lead engagement and system design

Conduct needs assessment

- Map current FM processes and pain points
- Determine scope: assets, PPM, reactive maintenance, space, energy, IoT, mobile access, etc

Define objectives

- Identify key drivers (e.g. compliance, cost reduction, data visibility, automation)
- Align with strategic goals (e.g. digital transformation, net zero, statutory compliance)

Review data readiness

- Audit existing data sources (asset registers, floor plans, maintenance logs)
- Plan for data migration/cleansing

Phase two: requirements and specification

Draft the requirements document

Include:

- Functional requirements (e.g. PPM scheduling, mobile workflows, reporting)
- Non-functional requirements (security, cloud/on-prem, support, integration needs)
- Compliance needs (e.g. ISO 19650, GDPR, H&S regulations)
- Future scalability

Engage stakeholders

- Consult widely (engineering, cleaners, IT, finance, compliance, etc)
- Capture user stories and priority features

Define budget and procurement route

- Estimate Total Cost of Ownership (TCO)
- Choose procurement route:
 - Public sector: frameworks (G-Cloud, CCS, NEPRO, etc.)
 - Private sector: competitive tender or direct award
- Plan for ongoing support/licensing costs

Phase three: market engagement

Market research

- Shortlist vendors using demos, webinars, peer recommendations
- Request case studies from similar organisations

Issue pre-procurement engagement (optional)

- Use PIN (Prior Information Notice) or soft market testing
- Understand delivery models, pricing structures, innovation

Phase four: procurement and evaluation

Issue formal invitation

- RFQ/RFP or ITT with evaluation criteria
- Include use-case scenarios, data standards, and integration requirements

Evaluate submissions

Criteria may include:

- Functional fit (scored against requirements)
- Usability (UX, mobile access)
- Implementation approach & support
- Price (licence, implementation, support)
- Vendor reputation and roadmap

Supplier demos and clarifications

- Use scripts to ensure consistent demos
- Score demos using agreed criteria

Phase five: Award and mobilisation

Contract award

- Ensure SLAs, KPIs, and exit clauses are clear
- Agree change control, training, support, and updates

Mobilisation plan

- Create implementation timeline with vendor
- Confirm internal resources and governance

Phase six: Implementation and adoption

Data migration

- Cleanse and validate data before upload
- Map legacy data to CAFM data structures

Configuration and testing

- Configure workflows, alerts, access levels
- Conduct UAT (User Acceptance Testing)

Training and change management

- Deliver role-specific training
- Use change champions for user adoption
- Prepare help guides and FAQs

Go-live and support

- Choose phased or full go-live
- Monitor system performance and user issues

Phase seven: Post implementation review

Measure success

- Track KPIs (e.g. job completion times, compliance rates, asset uptime)
- Gather user feedback

Continuous improvement

- Hold regular vendor reviews
- Maintain a CAFM improvement roadmap



Book a demo

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