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IT engagement

When procuring an IWMS/CAFM

For UK Estates Teams in the public and private sector

Overview of responsibilities

Role	Key responsibilities
Estate Teams	Define business requirements, lead procurement, ensure operational alignment
IT Teams	Validate technical feasibility, ensure cybersecurity, plan integration, support implementation
Procurement	Manage tendering, compliance with policy (e.g. G-Cloud for public sector)
Legal/Compliance	Review contracts, ensure data protection and governance alignment

IT involvement

Timeline

Stage	Estate team activity	IT role	When to involve IT
1. Requirements gathering	Define operational needs, space data, maintenance schedules, etc.	Provide input on data architecture, existing systems, cloud strategy	Immediately (Week 0-1)
2. Market research and option shortlisting	Research vendors and platforms	Help assess technical compatibility, review vendor technical whitepapers	Early (Week 2-4)
3. Business case development	Create internal business case	Validate cost of technical integration, infrastructure and support needs	Early (Week 3-5)
4. Procurement planning	Determine procurement route (RFP, G-Cloud, etc.)	Advise on IT policy (e.g. NCSC, cloud hosting, vendor assessment criteria)	Mid-stage (Week 5-6)
5. Evaluation of solutions	Demo & score solutions against estate criteria	Evaluate API capabilities, security posture, platform scalability, support models	Mid to Late (Week 6-8)
6. Selection and contracting	Finalise supplier, negotiate T&Cs	Conduct due diligence on technical architecture, confirm data protection compliance (UK GDPR)	Late (Week 8-9)
7. Implementation planning	Define go-live roadmap, migration plans	Plan integrations (e.g., HR, Finance, Building Mgmt Systems), environment setup, access controls	Immediately after award (Week 9+)

IT considerations checklist

When evaluating or selecting a CAFM/IWMS platform, the following IT-specific areas must be assessed:

Security and compliance

❑ UK GDPR compliance

❑ Cyber Essentials / ISO27001 alignment

❑ Hosting location (UK / EU only if needed)

❑ User access controls and audit logging

Data and architecture

❑ Data model flexibility

❑ Legacy system migration plans

❑ Backup and disaster recovery protocols

Integration and interoperability

❑ Open APIs or data exchange capability

❑ Compatibility with existing IT systems (HR, Finance, etc)

❑ Support for Single Sign-On (SSO) and Active Directory

IT operations

❑ Support & escalation model

❑ SLA and uptime guarantees

❑ Update cadence (SaaS platforms) and change control

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Common pitfalls

And how to avoid them

Pitfall	Prevention
Estates purchase without IT review	Always consult IT during requirements and market scan stages
Chosen solution lacks integration options	Ensure IT leads technical evaluation of APIs early
Cloud platform non-compliant with UK standards	IT to review hosting, security, and compliance certifications
No budget for IT resources post-implementation	Include IT effort in business case and TCO estimate
Vendor lock-in due to proprietary formats	Ensure export capability and open standards are considered

Communication protocols

- Weekly Project Stand-Ups during procurement and implementation phases
- Designated IT Liaison assigned to Estates for the duration of the procurement
- Shared Document Workspace (e.g. SharePoint or Teams) for technical documentation
- Escalation Path agreed in advance for technical blockers

Communication protocols

- IT must be a partner, not a downstream reviewer
- Design decisions should reflect both functional and technical needs
- Security and data integration must be non-negotiable in vendor evaluation
- Business cases must account for full lifecycle costs, including IT overhead
- Early collaboration avoids costly rework, delays, and compliance issues

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01925 989 500
keri.barton@concerto.co.uk