



Playbook

Why estates teams should procure their own CAFM platform.

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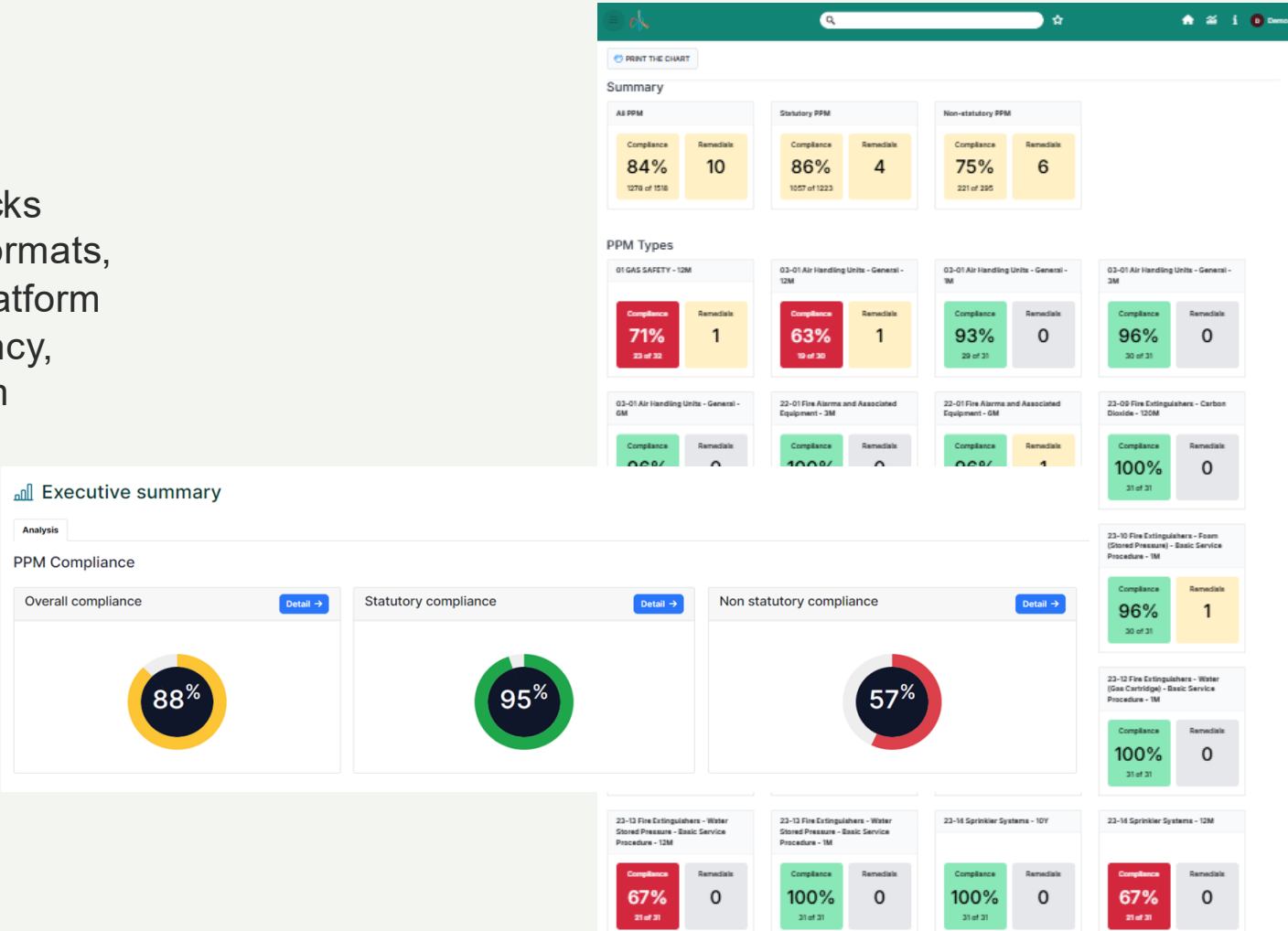
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Executive summary

Relying solely on an FM provider's CAFM system locks your estate operations into their process, reporting formats, and data access rules. Procuring your own CAFM platform returns control to the estate owner driving transparency, flexibility, better contract management, and long-term estate intelligence.



Strategic benefits

Independence and control

- Direct ownership of data, configuration and reporting.
- Avoid vendor lock-in or dependency on one FM provider's stack.
- Enables multi-provider strategies without needing multiple CAFM systems.

FM provider flexibility

- Smooth transition between FM providers without reformatting or data loss.
- Faster mobilisation and demobilisation of FM contracts
- Futureproofed against FM provider underperformance or exit

Estate intelligence

- Long-term view of estate performance, cost trends, lifecycle planning.
- Enables internal benchmarking across sites, regions, or assets.
- Data continuity across FM contracts, capital projects, and strategic plans.

Operational benefits

Transparency and accountability

- Real-time visibility of reactive and planned maintenance
- Direct access to performance metrics, SLAs, and work order histories
- Fewer excuses or “black box” issues from FM providers

Integration with other systems

- Seamless links to HR, finance, BIM, or IoT platforms
- Enable smarter buildings and centralised reporting across departments

Customisable workflows

- Ability to tailor processes to your organisation’s policies and standards
- •No need to “fit into” a generic outsourced FM workflow

Commercial and contractual advantages

Better value from FM contracts

- Clearer visibility = stronger contract performance monitoring
- Enables performance-based incentives and penalties
- Prevents overcharging, ghost jobs, or poor compliance

Data ownership and retention

- Full control over asset history, job records, PPM plans and compliance certificates
- Simplifies handover audits and contract reviews
- Retain data integrity through supplier changes

Procurement leverage

- You can tender FM services without bundling technology provision
- More vendors can bid = better pricing and service models

Risks

Risks of using your FM provider’s platform

Risk	Implication
FM provider owns the data	Harder to challenge performance or switch supplier
CAFM licence is bundled	You're paying indirectly, with no control
Lack of integration	Creates data silos across the organisation
Misaligned priorities	FM provider may under-configure features to save effort
Inflexible reporting	Limited ability to tailor dashboards to estate needs

What owning a CAFM system enables

Feature	Benefit
Multi-vendor access	Allow all service providers to use one system
Custom dashboards	Tailor metrics to leadership and compliance needs
Asset lifecycle planning	Centralised capital planning, not just reactive logs
Digital twin integration	Support smart buildings and IoT rollouts
Mobile apps for in-house teams	Empower your own operatives and surveys

Summary

Why you should own your CAFM system

- You gain **strategic control**
- You ensure **continuity of data and performance**
- You enable **multi-vendor flexibility and value**
- You build **institutional memory and estate intelligence**
- You futureproof your estate operations against vendor constraints

Summary

Talking points for stakeholders

- **To IT:** “We’ll control our data and simplify integrations.”
- **To Finance:** “We avoid being overcharged and get better FM value.”
- **To Exec Leadership:** “This strengthens our long-term resilience and performance oversight.”
- **To Procurement:** “We separate tech from service, increasing competition.”



Want to continue the conversation?

Speak to the Concerto solutions team

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