

About Michel Theriault

Driving the Shift in Facilities Management

FM Practitioner, Author, Speaker & Consultant to FM

Michel is a practitioner in Facility/Property Management with a passion for the profession and a track record successfully managing Facility and Property operations in-house, as an outsourced integrated FM provider and a service contractor. As an independent consultant, his experience helps Facility Managers assess, analyze, plan and implement initiatives to improve results.

His work, seminars, articles and his recent book stress the strategic and management aspects of facility management as important to leverage for existing technical and tactical knowledge.

The Facility Manager

Michel has experience in large corporations and smaller companies ranging from in-house service delivery to subcontractor services to the largest Facility Management outsourcing provider in Canada as Director of Facilities. Michel is a long-time IFMA member and holds the Real Property Administrator (RPA®) designation from BOMI and is LEED^{AP} certified.

The Author

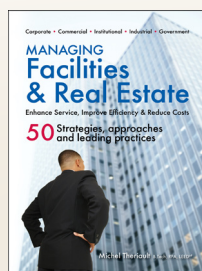
Michel has written the book "Managing Facilities & Real Estate" and has contributed articles to FM magazines in the UK, Canada, USA, Hong Kong, and the Middle East.

The Speaker

Michel has spoken at IFMA's World Workplace, BOMA' International Conference, Professional Retail Store Maintenance National Conference, the International Sanitary Supply Association National Conference, PM Expo, IDEX/Neon and others. He has delivered FM workshops, including in the Middle East, and his seminars are well regarded by participants.

Some of Michel's Seminars & Services

- Sparring Partners: Build Supplier Relationships for Better Results
- Don't Write, Communicate : Get Your Message Across & Influence Others
- Intelligent Benchmarking and Beyond
- Are You Invisible? Promote your department for visibility & Success.
- Switch from Price to Value: Get Better Bids with effective RFP's
- Stop Spinning Your Wheels: 5 Ways to Shift from Reactive to Proactive
- Between a Rock and A Hard Place: Customer Service in Facilities
- Coaching, Strategic Planning & Facilitation for FM departments.



"Managing Facilities & Real Estate"

By Michel Theriault

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thebuiltenvironment.ca
Also available Online from Amazon

"This book provides best practice management techniques and strategies for continual improvement that are routinely used by successful senior facility managers and executives to run their operations effectively."
– Ron Swail, Assistant Vice President Facilities & Services, University of Toronto

"I thought the seminar was very good, a lot of good information on where the focus should be and additional materials you'll need to get you the desired results!" - R.D.

"My staff have been coming to me to let me know how they are implementing the ideas you showed us. Your class has been a success." – G.L.

"Thank you very much for the informative session. I believe you presented a very "realistic" approach that I've often seen overlooked." - G.W.

"Your seminar was excellent and informative. I appreciated the information presented as it was very useful." - W.W.

"I'd like to thank you for facilitating our meeting. Not only did you keep us on the 'clock' but your probing questions and summary of discussions will contribute to a better product" – A.M.

"Thank you for an enjoyable 3 days of great learning and participation. I feel the knowledge I gained gave me tools to change views at the office." - C.B.

Visit StrategicAdvisor.ca for more information, articles, resources and services.

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Consulting & Advisory Services for FM

Success Areas

Lower Costs

Lack of information or an insulated operation can prevent you from seeing opportunities.

Enhance Service

Whether it's using what you have better or implementing procedures, you can deliver better service.

Improve Efficiency

Wasted efforts and lack of tools to manage can prevent you from getting the most from your resources.

Our experience and approach lets you solve problems, get results and augment your resources.

Getting outside expertise while focusing on your day-to-day responsibilities leads to success. Tap into years of proven Asset, Facility and Property Management experience to help you improve your efficiency and reduce costs.

About Strategic Advisor

Our Principal, Michel Theriault, is a practitioner in Facility/Property Management with a track record successfully managing Facility and Property operations. As a consultant, he uses his experience to help you implement your plans.

Michel has experience with large corporations and smaller companies ranging from in-house service delivery to subcontractor services to the largest Facility Management outsourcing provider in Canada. Michel is a long time IFMA member and holds the Real Property Administrator (RPA®) designation from BOMI and is LEED^{AP} certified.

About our Services

We provide a range of services and can design a service or scope to meet your specific needs. We provide a no-obligation consultation to discuss your requirements and see how we can meet your needs and get results for you. Please contact Michel to discuss your initiatives.

Using a Consultant Makes Sense

Efficient use of your resources - We handle things so you can focus on your priorities.

Get an Outside View - We bring objectivity and a broad range of experience to you.

Get Results Quickly - We get things done on your timeline and to your satisfaction.

Value for Money - You get the skills and experience you need only when you need them.

Learn more about Michel on the website or on his blog at TheBuiltEnvironment.ca

Our Services

Cost Management & Supplier Assessment:

With no agenda or department to protect, our experience managing suppliers and costs in an outsourcing environment will help you assess contracts, services and spending.

Operational Assessments : A review can help you fine-tune or completely revamp your organization and systems by comparing to best practices.

RFP/RFQ Documents : We apply leading practices to develop a document and process that gets you the service you need, not just the lowest cost.

FM Systems : Systems essential for managing facilities. We help develop requirements and justification then support the selection and implementation process.

Strategic Planning : Most FM's are dealing with operational, personnel and service issues with no time to plan the future. We help you develop a Strategic Plan and implement for success.

Business Cases : Our success collecting facts, developing solid arguments and crafting them into a business case will help you get approval.

Outsourcing Decisions : We take you through an unbiased process that will help you make the decision.

Performance Management : If you don't measure results, you don't have information for decisions and initiatives to improve service and reduce costs. We develop measures that get results you need.

Customer Service : Customer service is important for success. We assess processes, implement techniques and surveys so you can assess results and make changes your occupants will appreciate.

Policies & Procedures : They enable consistent, effective results. We help you design and develop easy to understand and implement procedures.

Training : We provide on-site training on various topics with a clear Facility and Property Management focus.



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For Contracted Services
Assess value and approach for best results.

Service Contract Reviews: Verify Service, Value or Prepare for Re-bid

Service contracts are not only a large part of your total costs, they can consume your time and effort and have a large potential impact on your risks, occupant satisfaction and successful stewardship of your assets. Are they set up to make it easier for you and to get service results you need?

A Service Contract Review by an independent third party can help you ensure that you are getting the services you expect, that your contract documentation, including procurement, pricing, measurement and management, are delivering the best value and even establish the best approach for a renewal or re-bid.

The review isn't designed to punish your suppliers, it's a fair and un-biased audit and evaluation that helps you move forward and demonstrate your value in the organization.

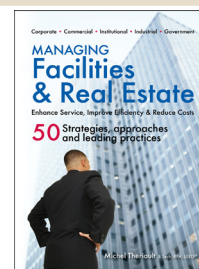
What are the benefits of a Service Contract Review?

- Determine whether you are getting what you paid for and identify approaches .
- Identify whether your contract, procurement and management documentation and processes be are delivering best value.
- Prepare you for a renewal, negotiation or re-bid.
- Provides you with due-diligence and an unbiased recommendations you can use internally if required to initiate changes.

What will we do?

1. Audit Service Delivery against specifications, including deliverable, and identify gaps
2. Analyzed contracts and specifications to identify opportunities to change them
3. Assess the procurement and pricing model and methodology to ensure they meet your ongoing operational needs.
4. Review and evaluate reporting, measurements, KPI's and service management
5. Interview you and your supplier to identify collective issues and solutions
6. Provide a final report with recommendations you can use to make improvements.

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Strategic Planning: A Team Approach to Planning - The Easy Way

Does your team think Strategic Plans are only for the Executives of your organization? Do they think they have to be a 'brick' that nobody ever bothers to read? Do they know how easy they can be and how useful they are?

This workshop starts with why Strategic Plans are critical to success and why they can be used to deal with any issue or problem by anybody in your department using a quick and easy approach.

Then we frame an issue and in a facilitated session, walk your team through developing a sample strategic plan so they can see the process and how easy it is, starting with the 1-page Strategic Plan and the 1-page Implementation Plan. Part of the process involves helping them understand how working as a team is a better than working alone. An optional group exercise (A Survival Situation from Human Synergistics) can be administered during the workshop to provide a compelling demonstration of the value of teamwork.

Next, depending on the size of the team, we will collectively pick 2 or more issues or problems and working in groups, develop an initial Strategic Plan and Implementation Plan. The process will be facilitated to ensure full participation and an appropriate end result.

Not only will this workshop demonstrate how easy a Strategic Plan can be developed to address their issues, you end up with initial Strategic Plans that your team has helped develop.

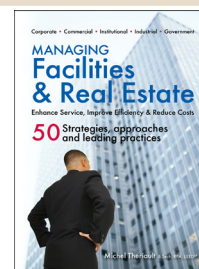
Key Outcomes:

1. Your staff learn that a Strategic Plan is a valuable tool that they can use.
2. Discover simple techniques they can use to develop Strategic Plans that work.
3. Get your team engaged and get results by having them develop a Strategic Plan for an issue or problem your team wants to solve.

Workshop Developing Strategy



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**For a
Specific
Problem or
your entire
meeting**
Generate Ideas,
find solutions,
build your team
or address
issues.

Facilitation: Team Building & Problem Solving for FM Depts.

Are you planning a conference or team meeting for your Facility Management staff? Do you have an issue or initiative you would like input, ideas and even consensus about before moving forward?

If so, an outside resource can get the best results from a group meeting, whether it's to find solutions, generate ideas or simply bring the team together.

As the senior member of the team, you can be involved directly in the exercise without having to manage the input, flow and contribution. This makes for a more open forum for your staff to contribute since a neutral yet experienced FM resource is facilitating instead of their boss.

With Michel, you get a facilitator with deep experience in all aspects of the Facility and Property Management function, adding credibility with your team and ensuring the guidance provided by Michel to the team during the group session is well grounded in the issues and interests of managing Facilities.

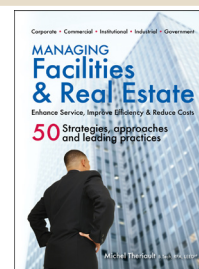
Why use Facilitation?

1. Facilitation is a practical, effective way to help you work with your team to develop solutions and ideas for implementation.
1. You can't run a group session and fully participate at the same time.
2. A neutral facilitator is better equipped to draw out unbiased consensus from the team.

What will we do?

1. Help you frame the issue and set the agenda, including the purpose and the outcome you want.
2. Work with you to understand personalities, your team's dynamics, pre-conceived notions and other barriers to consensus and work around them during the group session.
3. Provide a structured, planned process for your team to work through the issue, develop ideas, identify solutions and establish consensus.

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Mentor & Sounding Board.

Develop and grow in the profession

Coaching: Development For Your Staff, Your Team or Yourself

Coaching is a standard business approach to help managers and leaders with their development and with specific elements of their job.

With a confidential third party who isn't invested in the organization's politics or imbedded culture, you get someone to help guide you through ideas and options with an un-biased, broad based view that helps you look at things more objectively.

As a coach, we are experienced in your profession and understands the industry and the approaches and issues experienced by others, providing you with insight you wouldn't otherwise have available to you.

The coaching is customized to the needs of the individual or the group. It can include coaching on professional and personal development, goal setting, management and leadership including many business skills needed for success, like communications, presentation skills, strategic plans or business cases as examples. Or it can simply deal with issues that require sober second thought and an un-biased catalyst for discussion, discovery and decision making.

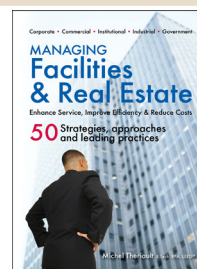
Why Coaching?

1. It's a commonly used tool for developing and retaining important staff, whether that's you or members of your team.
2. It provides an external, confidential and trusted resource the provides stimulation and discussion around important aspects of development or issues.

What will we do?

3. Develop the specific program of coaching support and develop goals with the individual or team, including the participants commitments to the process.
4. Follow a planned schedule for coaching as well as being available on an ad-hoc basis to discuss and deal with specific needs as they arise.

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Occupant Satisfaction Surveys

Satisfaction Surveys provide you with key information about your FM services to help you make decisions and improve services.

Why Survey Occupants?

Surveys give you the information and facts you need to influence decision makers and make strategic decisions to improve results and succeed in your role.

Without input from the people you work hard to provide a productive environment for, you won't have a complete picture.

We make it easy and ensure you get the information you need. And don't be afraid of bad results. They will simply be information you can use for resources or support you need to serve your company better.

Web Based Surveys

Surveys are hosted by FMinsight and accessed through a direct link. The welcome page is customized to include your branding and message. The actual survey pages are clean and load quickly with easy navigation, flexible question formats and automatic compiling of results, making the data ready for analysis.

FMinsight's Role

As a Facility and Property Management Advisor and Consultant with extensive operational experience, we provide experienced insight into the survey and analysis, ensuring you don't just end up with numbers - you also have information you can use to improve services and enhance efficiency in your operations.

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Survey Development

We can develop effective surveys for a wide variety of purposes, including quality assurance, tenant satisfaction, transaction satisfaction (i.e. work orders, projects)

Results are assured since we develop questions to meet your goals and provide you with information you can actually use to make improvements, take action and make strategic decisions.

Survey Administration

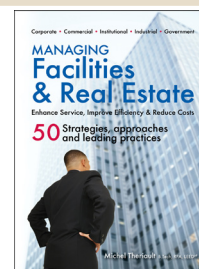
Your surveys appear with your own branding. We use a number of different survey techniques, including drop down lists, ranking, matching, importance scales and comment fields.

Surveys are distributed through email with a web link, a link on your intranet page and even in paper format if needed.

Survey Analysis

Surveys are developed to enable analysis of the results and we provide the analysis with your input and help you develop communication plans, action plans or make strategic decisions.

Our experience in Facility and Property Management ensures you get the best value from your survey initiative, whether it's to solve a problem or demonstrate service quality to occupants and senior management.



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FM Assessment Program (FMAP): Operational Review

The Assessment Program provides insight into your operations compared to best practices and delivers clear, actionable information you can use to identify and prioritize strategies for your operations.

Our Approach

Our approach is objective and measurable. It is a non-judgmental comparison of your specific organization structure, systems, access to expertise, service delivery models, practices and procedures, systems, information and functionality. We can also focus on areas you identify.

We can conduct the full Evaluation Assessment or just a shorter Checklist Assessment.

Checklist Assessment (FMAP-C)

This short assessment involves on-site interviews with FM staff and a review of the documents, processes and systems used to deliver services. This is a low cost option that compares the combined best practices from successful Facility and Property Management companies and leading in-house organizations.

The checklist covers areas such as communications, customer service, asset management, emergency, energy and environmental management, lease management, occupancy management, project management, maintenance, performance management, quality assurance, HR practices, Health & Safety, standards, practices and policies.

The result is a Checklist Assessment report which identifies all areas where current practices match best practices and also identifies where gaps exist in the current organization or operational models. The report provides a % rating in major categories against best practices and provides a short summary on each of the 14 main categories.

Evaluation Assessment (FMAP-E)

This in-depth assessment includes the Checklist described above, however it involves a more involved review and assessment of current organization and support structure effectiveness. The Evaluation goes deeper into the delivery of service and provides a longer written report that identifies opportunities for change in a prioritized list. This lets you assess and implement based on your specific requirements and organizational needs. We can even help you with a presentation to your organization on the results.

This involves on-site interviews with staff, customers/occupants and senior management in addition to a detailed review of documents, processes, procedures and systems used to deliver services. The result is a detailed report that identifies strengths of the current organization, gaps relative to industry practices and provides prioritized recommendations for improvements and changes.

The evaluation and recommendations take into account the realities of your current operational situation and provide you with an external viewpoint you can use for internal business cases to support your initiatives.

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Get An External Appraisal.

Benefit from
broader insight
about industry
practices and an
independent 3rd
Party review.

Get the information
you need to prioritize
initiatives and
develop business
cases to support your
strategic plans and
initiate change.



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Outsourcing Support: Decision, Planning, Selection, Transition & Perform.

The Right Solution.

Informed Insight and Experience.

Benefits Outsourcing may be right for your organization or it may not. With a careful analysis from an independent expert, you will make the right business decision. And, if you choose to implement, you will get practical, experienced advice on how to be successful.

Whether you are currently assessing your options or have decided to outsource and need to implement, we can provide support through a single phase or all phases of the initiative, depending on your needs, including working with you and your current provider to improve results.

Our Approach

Outsourcing is a business strategy you should consider, however it's not automatically the best solution. We help you assess the benefits and identify the costs and risks of this important decision. The exercise can help you identify what you can do internally instead of outsourcing.

Strategic Support

Outsourcing is a business strategy, not simply an initiative. Our experience developing outsourcing requirements, transitioning large outsourcing contracts and providing outsourcing services gives you the strategic insight to make a fully informed strategic decision for success.

We use our past experience and work with you to develop a unique solution to your issue rather than using a cookie cutter formula. We analyze your situation to develop options that get you what you need.

We understand the supplier side of outsourcing, which is key to your outsourcing success and provides valuable insight into how to successfully engage suppliers in the current market.

Practical Implementation

There is lots of theory around outsourcing, however as always, the real-world application and implementation doesn't always follow theory. Our practical experience enables us to cut through the hype and focus on what outsourcing really is and how to make it work for you.

There are no single answers when it comes to deciding and implementing an outsourcing initiative. Success comes from flexibility and understanding how different models and approaches influence results and behavior differently—and then matching this to your needs. With hands-on experience with a large integrated outsourcing provider, we understand the traps and the opportunities, what to focus on and what you shouldn't spend time worrying about.

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5 Phases for Success

Outsourcing Decision

A detailed review and a full understanding of the costs and benefits of outsourcing establish the best course of action.

Planning

This includes the stay-back-team, org. structure and interfaces, scope and methodology for sourcing and planning for transition.

Selection

Outsourcing is different from subcontracting. It needs a specific approach to maximize success and select the best FM provider.

Transition

This critical element includes change management, communication to all stakeholders, scheduling and planning activities and integration and coordination with existing providers and suppliers.

Performance & Assessment

It's more than just putting KPI's and SLA's in place. As a complex service your company relies on, you need a proactive framework for managing performance along with follow-up audits to ensure ongoing success.



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Step Up with FM Systems.

Manage your
processes and
get information
for decisions and
improvements

Get un-biased,
experienced help
developing your
needs, managing the
implementation and
follow-ing up after
implementation to
ensure the system
functions and is
being used properly.

FM Systems: Business Needs, Justification & Implementation

FM systems provide you with better processes, control over work activity and most importantly, information you can use to manage resources, make decisions about your operations and use to support and justify business cases and initiatives.

Make your systems project successful by wrapping the implementation in an effective business needs assessment, change management process, start-up, implementation, training and follow-up plan.

Our Role

Strategic Advisor provides overall management and advisory services independent from software consultants and vendors. We help you develop your business needs, develop your business case, prepare change management, monitor implementation and follow-up to ensure success.

Strategic Advisor is not affiliated with any software vendor and has extensive operational experience in large and small facilities portfolios. We understand the operational issues around implementing systems and that's the focus we use when looking at systems - not from the software vendor side.

Why do you need a system?

Implementing FM Systems including CAFM, CMMS, Work Order management and Help Desks can sometimes be the single most important thing you can do to improve service, reduce costs and preserve your assets, including reducing future costs. It also provides you with information you need to make decisions.

Unfortunately, many systems are implemented without first understanding why you need it, what you will use it for and how it will integrate with the rest of your operations, including effective processes and training to ensure your staff buy-in and support the initiative. This includes recognizing the resources required, providing refresher training, auditing the system and the processes some time after implementation to make sure they are working as intended and making the appropriate changes.

The biggest problem is not establishing what information you really need and how you will use it to improve your operations. Built-in reports are often not enough. The information you get from your system is perhaps the most important feature along with better process management.

Why use an Independent Consultant?

Using the Software Vendor or Software Consultants with ties to vendors will often short-circuit the important front-end process you need to do - before you engage the software company. This is assessing your needs, developing your list of requirements, integrating it with your current practices, staffing and resources and then seeking the system that matches. Another error is implementing just a software system. You need to implement a complete business process - the software is just one part. If you don't, you are likely to fail.

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Asset Management: Services for Owners & Managers of Real Estate

Support for your Assets.

You get the right advice to mitigate risk, reduce costs, preserve your asset for the long term while housing your organization's core business and supporting it's success.

Asset Management is an overall strategy to manage your facilities and maintain asset value, minimize costs and ensure your real estate serves your core business effectively.

As a bundled service, Asset Management delivers results by integrating all aspects of managing properties using expertise and knowledge many companies do not have internally. It supplements your resources or provides overall guidance in the management of the facility maintenance, capital planning, repair and replacement strategies, energy cost reduction strategies, etc.

Strategic Advisor's Role

We provide overall advisory services independent from your internal staff or external suppliers.

Strategic Advisor works with your existing suppliers and organizations or bring to the table the best providers to deliver the services you need to manage your assets. We procure or assist you in procuring these specialized services and deliver strategic advice and plans.

Services

Our Asset Management Service gives you experienced management and strategic advice to better manage your property assets and services. Strategic Advisor can provide the following and more as part of our Asset Management services:

- Annual Management Plans
- Implements performance management tracking
- Establish procurement / subcontracting strategy for service improvement and cost reductions
- Review, assess and make recommendations on current services
- Establishes capital plans, priorities and justifications
- Develop energy conservation strategies
- Reports and assessments
- Interface with subcontractors and Landlords

Your requirements will be unique to your specific organization and your own unique situation. We customize our services to match your requirements and deliver the best value and results possible.

Working for You

As independent advisors, Strategic Advisor gives you experienced Asset Management services and strategic advice to better manage your property assets and services. We are not affiliated with any service provider, manufacturer or contractor.

We work with you to manage and integrate the many different services and requirements needed to manage your properties, providing coordinated, consolidated service and experienced strategic advice.

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