



Transforming Real Estate and Facilities Management

Breaking Down Silos with IBM Maximo

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FMMUG
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Corporate real estate is undergoing a **shake-up**...

...the time for enterprises to **slash costs** from their real estate operations is now



Most corporate
real-estate
groups have

30–50%

more real estate than it needs.

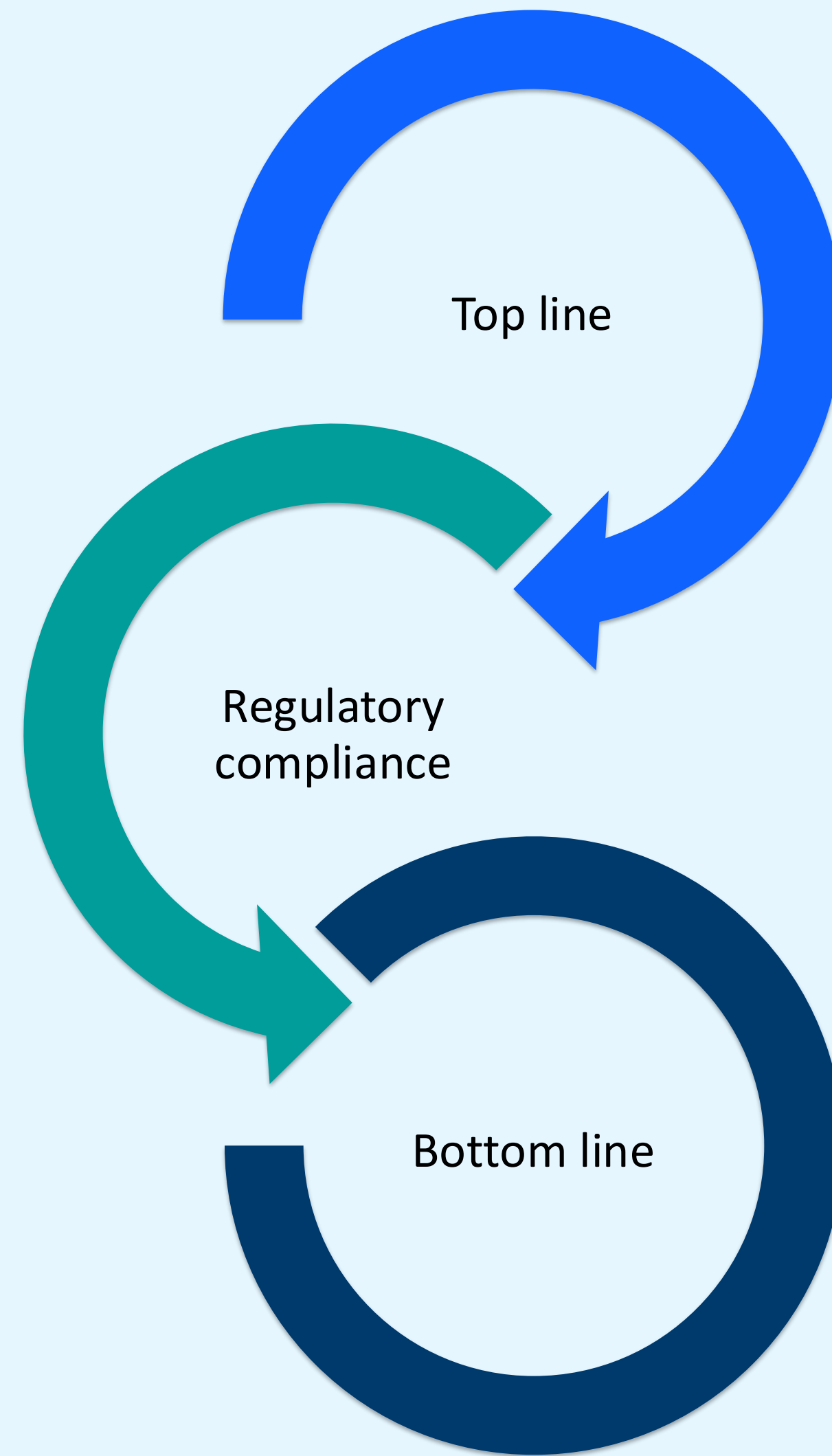
That was before the Pandemic

Today, in-office occupancy
remains stuck below

50%



Leading-edge enterprises are **transforming real estate operations** from an afterthought to a contributor to growth and profits

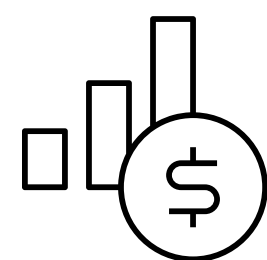


- Workforce productivity can improve by 20-25%
- Availability of revenue-generating facilities such as retail outlets, restaurants, bank branches or arenas
- Uptime of revenue-generating capital assets such as cell towers or billboards

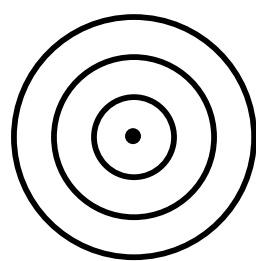
-
- Lease accounting mandates (ACS, IFRS, GASB)
 - System of record for audits (safety, ISO, SOC,...)
 - Environmental audits
 - ESG reporting

-
- Real estate portfolio optimization and realignment
 - Reduction of space usage
 - Efficiency of maintenance and warranty repairs
 - Cross-pollination of data across the real estate lifecycle to optimize operations

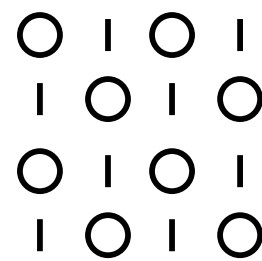
Enterprise real estate challenges are increasingly complex



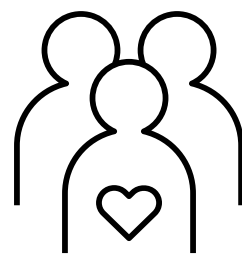
Real estate is often the second highest organizational cost, exceeding 30% of spend



Enterprises are hampered by siloed systems that increase costs and prevent timely response to critical events



Data proliferation and the isolation of data between real estate functions limit cost savings



Investment in workplace experience moves to the forefront of efforts to attract talent

Further by 2025, buildings will become the top category for energy consumption

Buildings consume 42% of all electricity worldwide

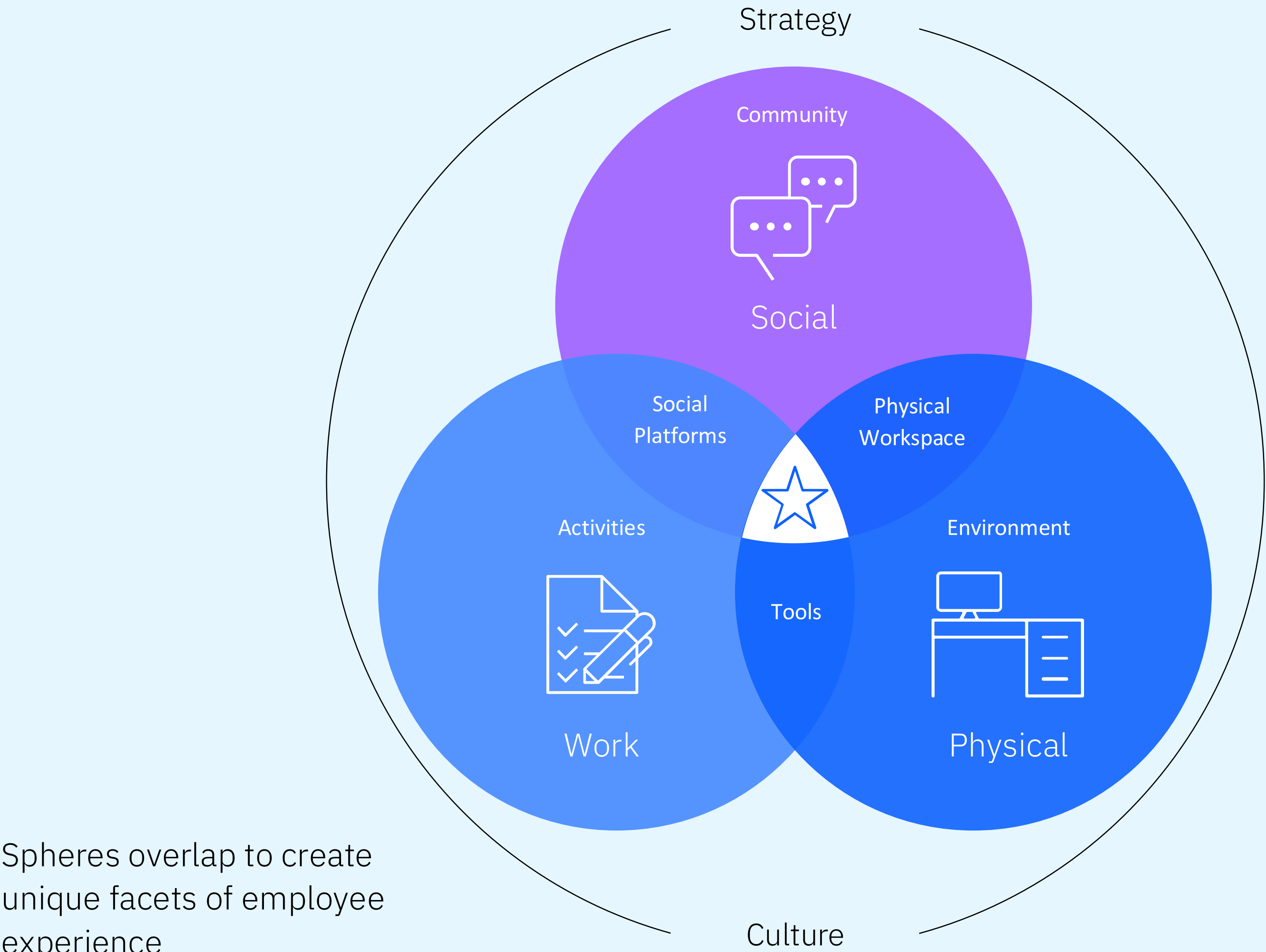
However, up to 50% of that consumption is wasted

Buildings are the top contributor to global CO₂ emissions

Workplaces are
adopting new
work models
centered around a
technology-driven
solution framework



Workplaces are adopting new work models centered around a technology-driven solution framework



Enterprises balance **competing organizational goals** to elevate performance while reducing costs

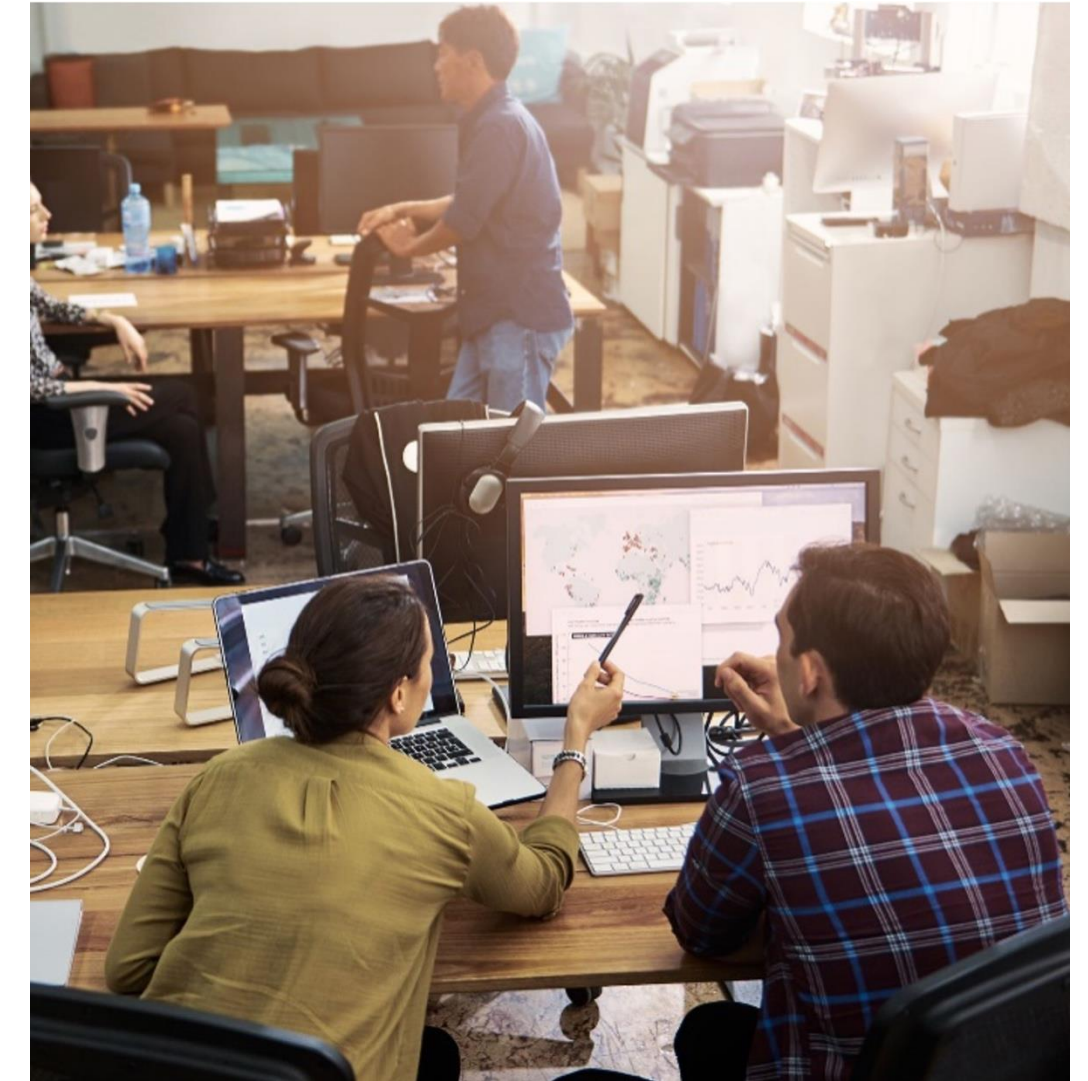
Drive down real estate and operational costs for underutilized facilities

- CRE
- CFO



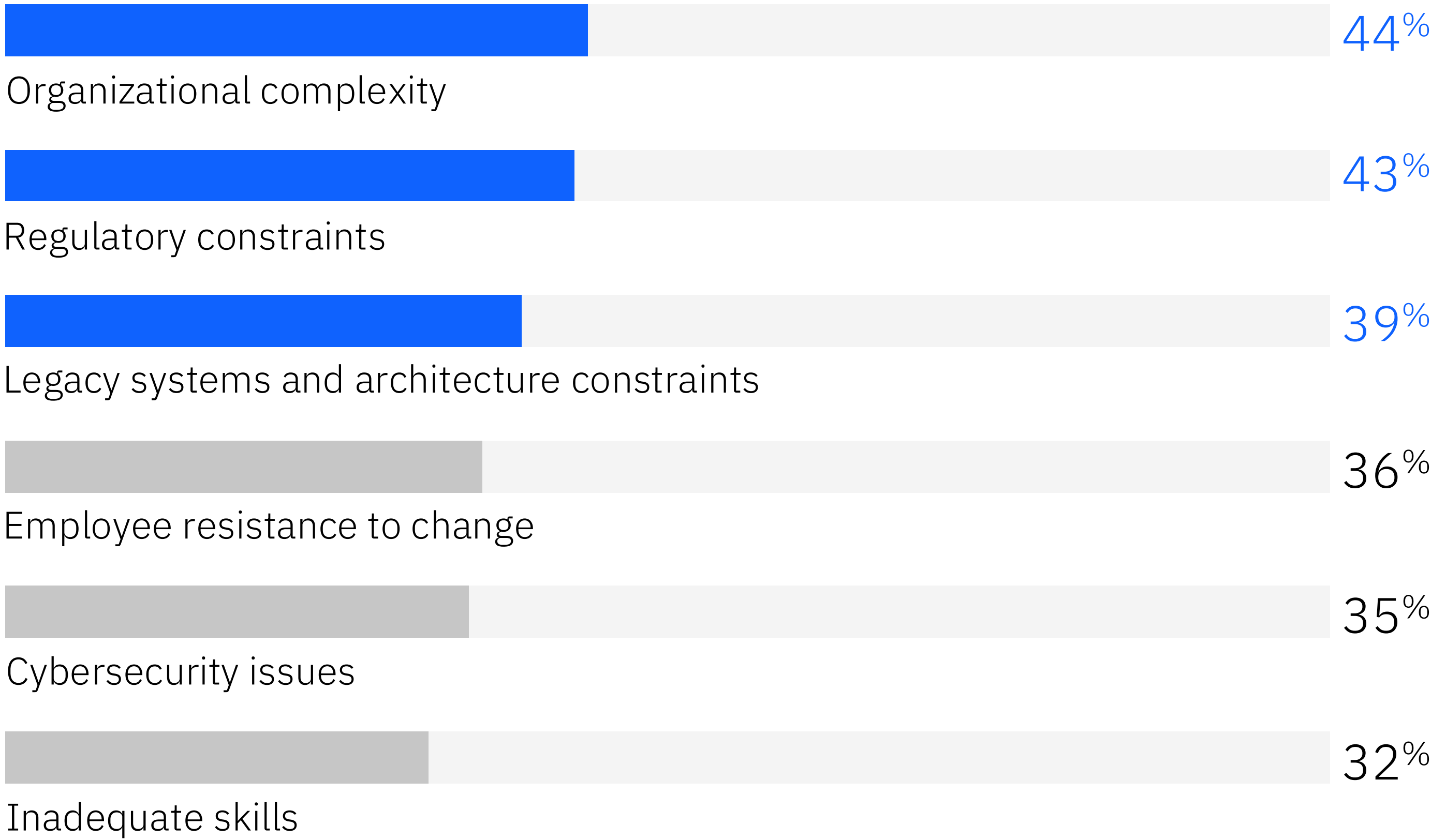
Workplace of the future delivering enhanced workforce productivity and efficiency

- CIO/CXO
- HR



Organizational complexity, regulatory and operational constraints are holding back digital transformation

What are the biggest challenges to your enterprise' digital transformation efforts?



- Many enterprises have complex operations that require **business process automation** and **configuration**
- ESG regulatory reporting requires ongoing information across real estate portfolio
- Most enterprises have more than 10 systems, some over 40 that manage real estate lifecycles
- Single-purpose “best of breed” solutions offer limited ability to connect data across operations

Source: IBM Institute for Business Value Global CIO Study, 2021.

Decisions about facilities may be isolated into different functions

Should this building/asset be leased or owned?

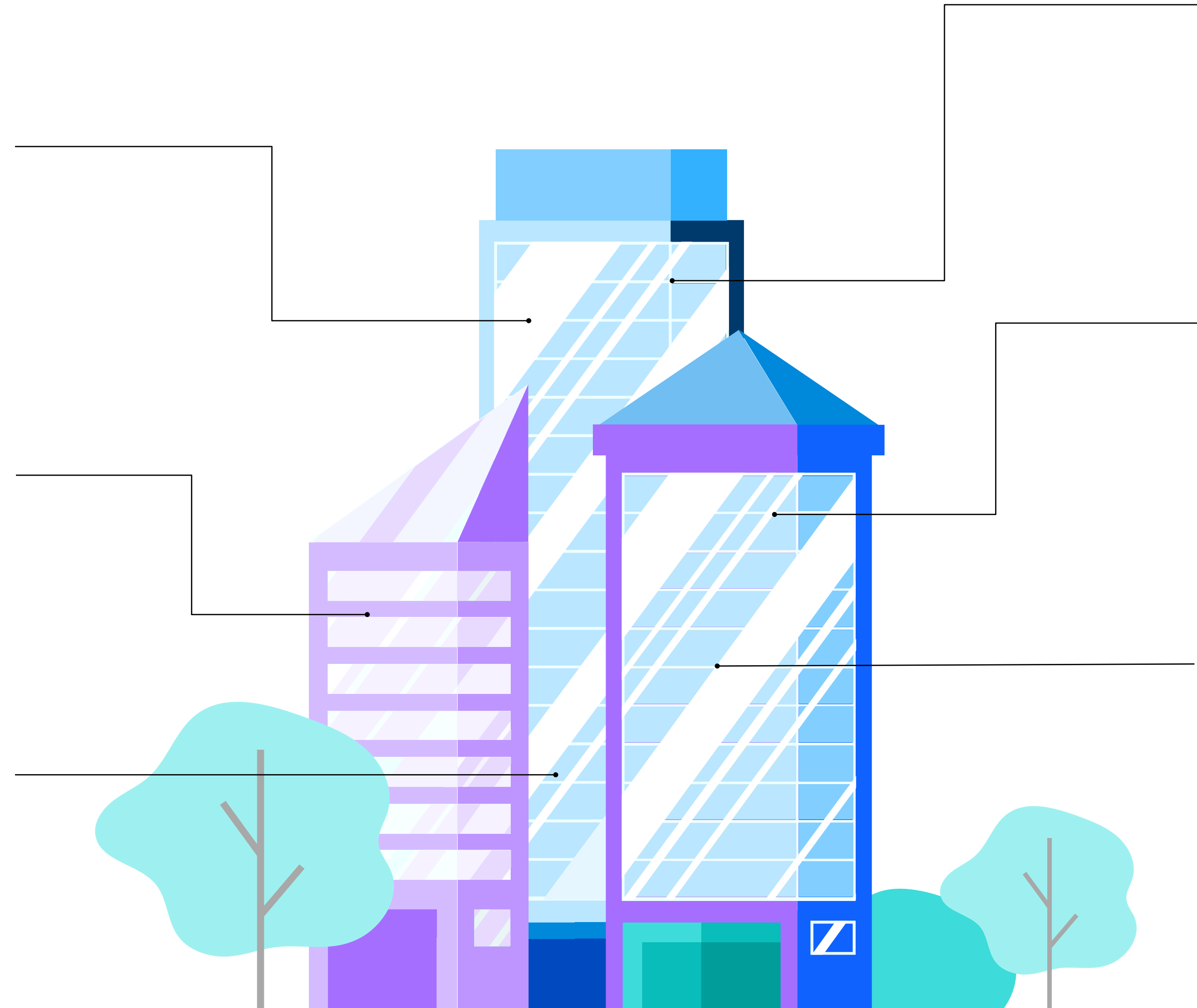
- Real estate portfolio planning
- Site selection
- Lease accounting regulations
- Lease administration

Does a new facility need to be built or renovated?

- Project management
- Program management
- Vendor selection and bids
- Contractor management

How are maintenance needs serviced??

- Provision service requests
- Cleaning
- Corrective maintenance
- Condition maintenance
- Warranty management



How should sustainability efforts be advanced?

- Utility consumption
- Environmental audits
- Track emissions
- ESG reporting

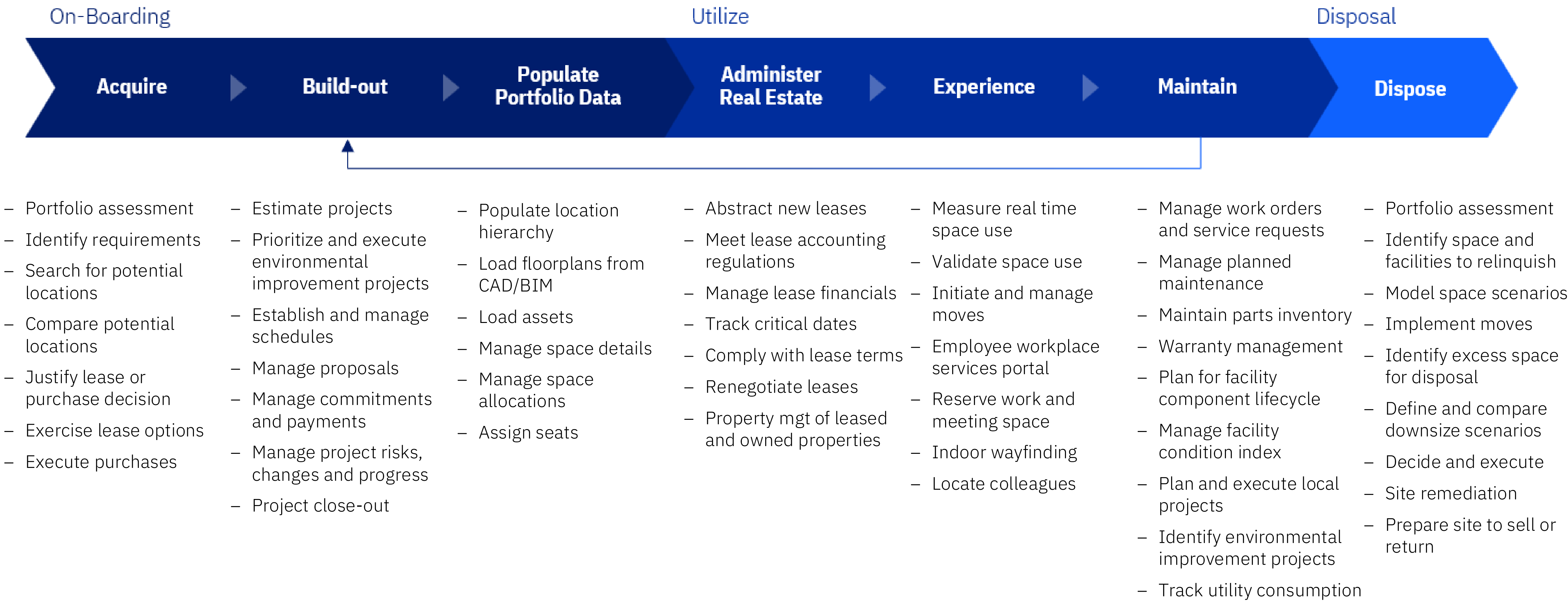
What is the best way to set up the space our people need?

- Dynamic space planning
- Space forecasting
- Occupancy monitoring
- Facility utilization

Can the occupant's experience be made awesome?

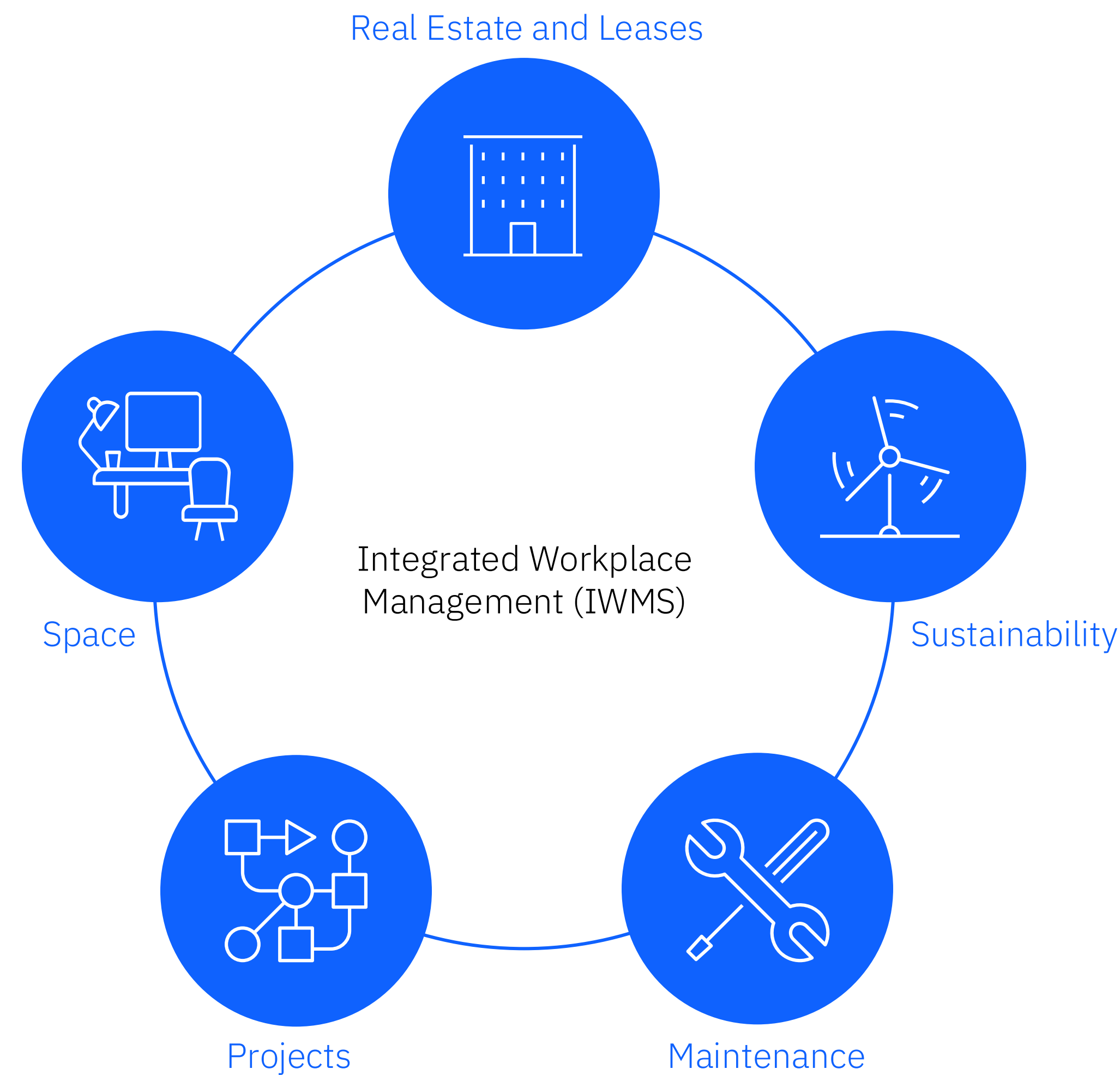
- Enable space reservations through mobile or desk scan
- Indoor wayfinding
- Calendar integration
- AI assistant
- Interactive kiosks and room panels
- Employee service requests

Maximo Real Estate and Facilities manages real estate throughout its lifecycle

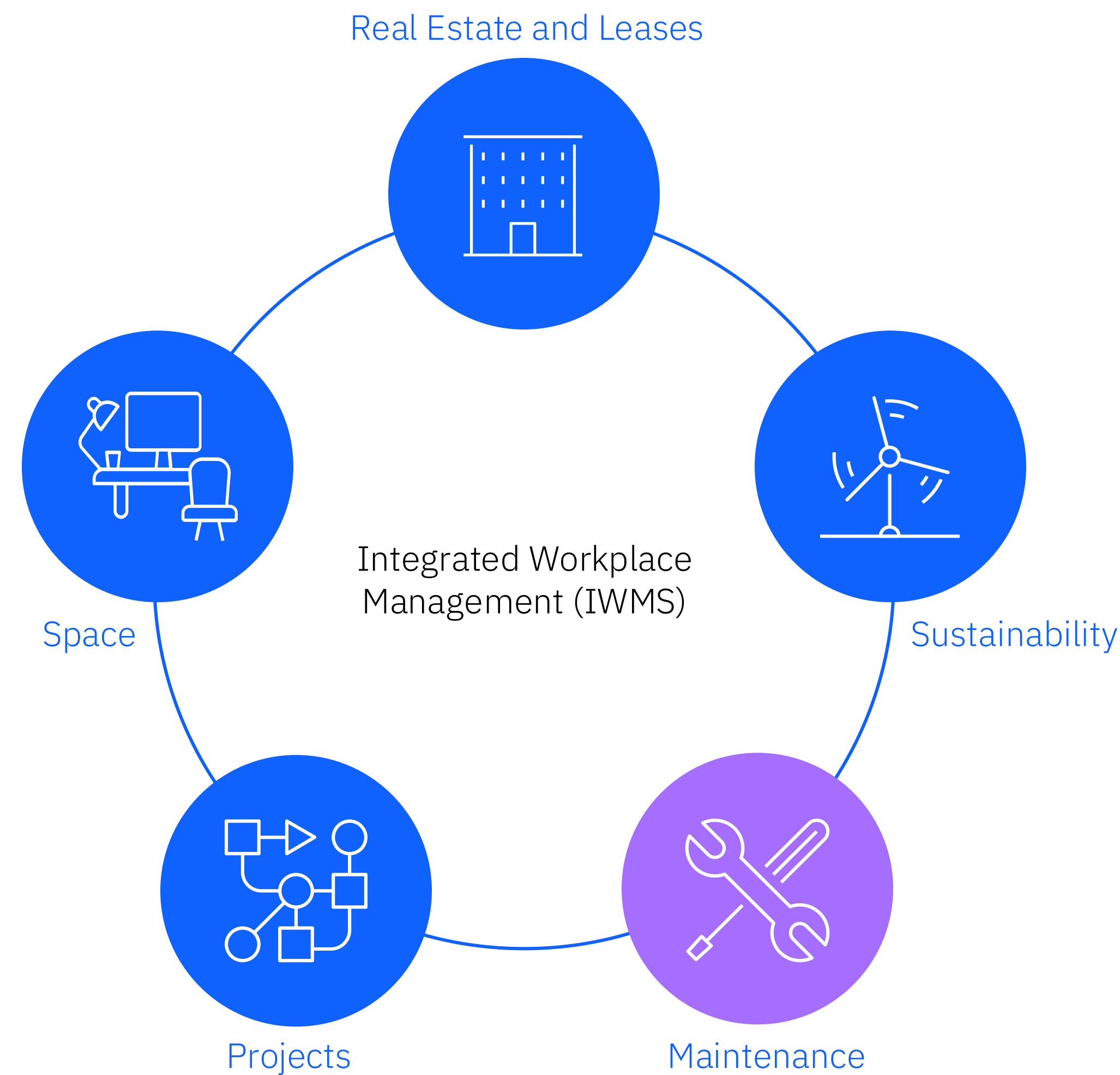


...all capabilities are available out of the box and are aligned to business processes through configuration

Corporate Real Estate teams focus on five core capabilities across their portfolio

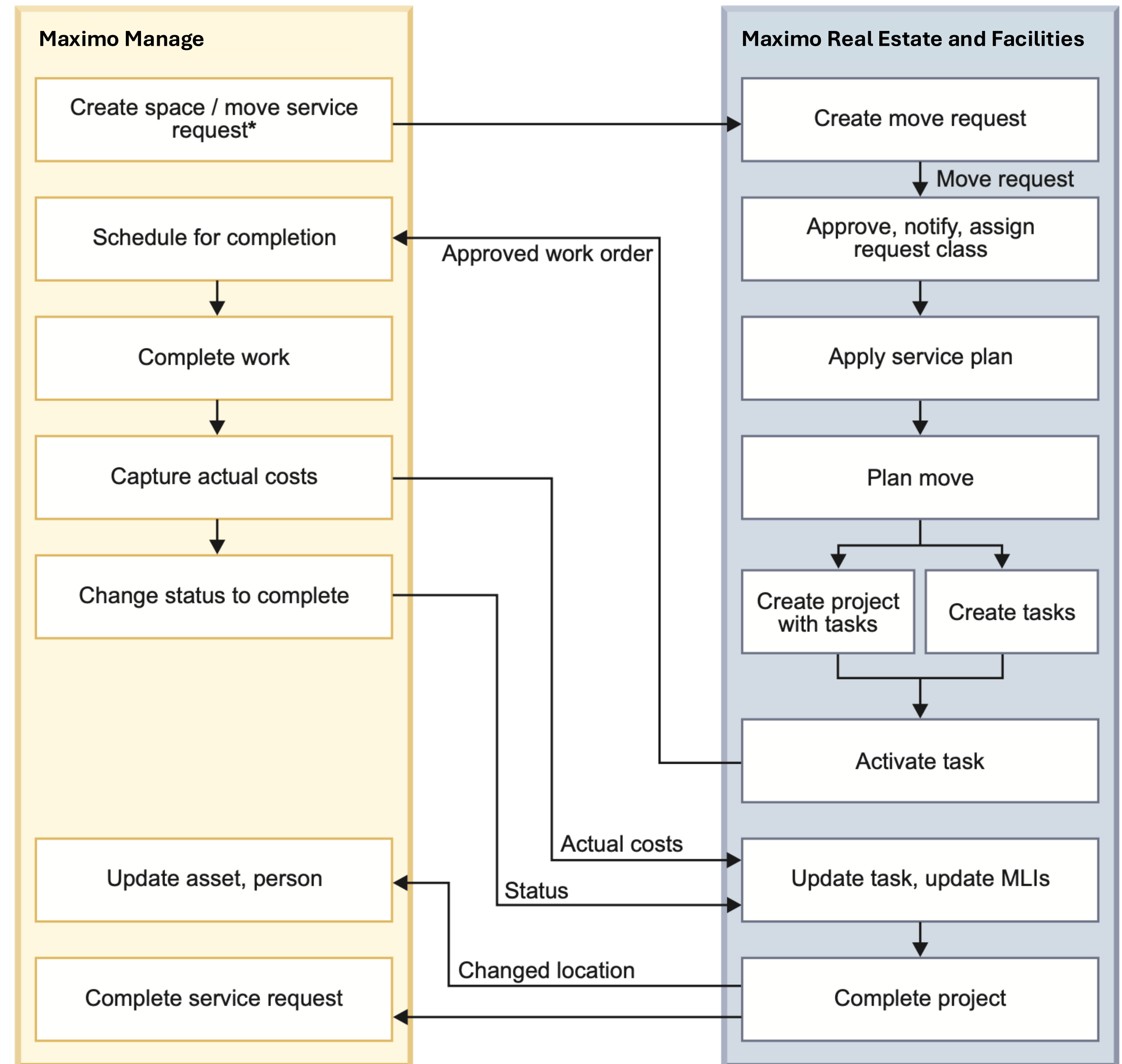


Corporate Real Estate teams focus on five core capabilities across their portfolio



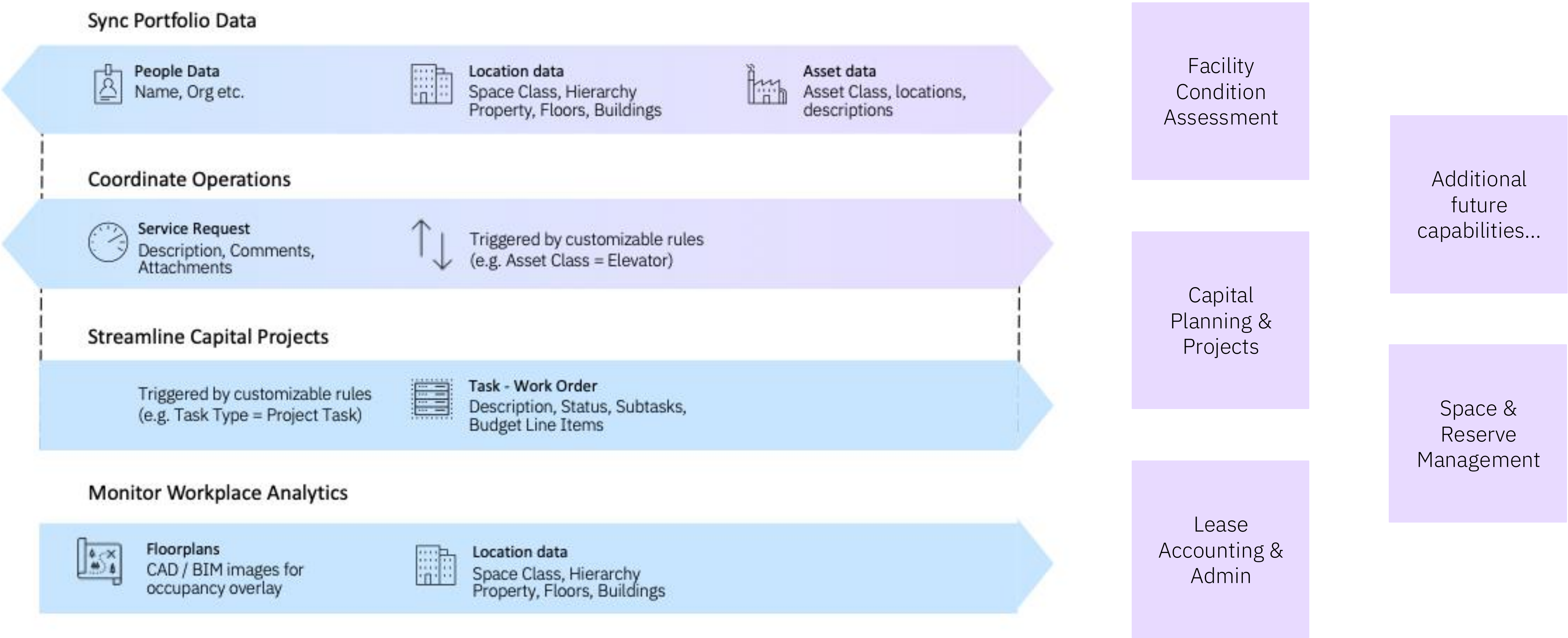
Operations and Maintenance integrations are critical for a seamless experience

- Real Estate focused Service Requests or Space Moves could be initiated through service technicians, employees or contact centre staff
- Capital Projects contain activities that require “work” to be completed as part of the implementation project
- Depending on the tasks that are required, these (likely) need to be raised in Maximo Manage and tracked against the Service Request, Move Request or Capital Project activities
- As the work progresses, statuses should be sent back to the Real Estate and Facilities to allow the overall status to be monitored
- To complete the real estate operations and maintenance, status, costs and updates need to be captured back from Manage when complete

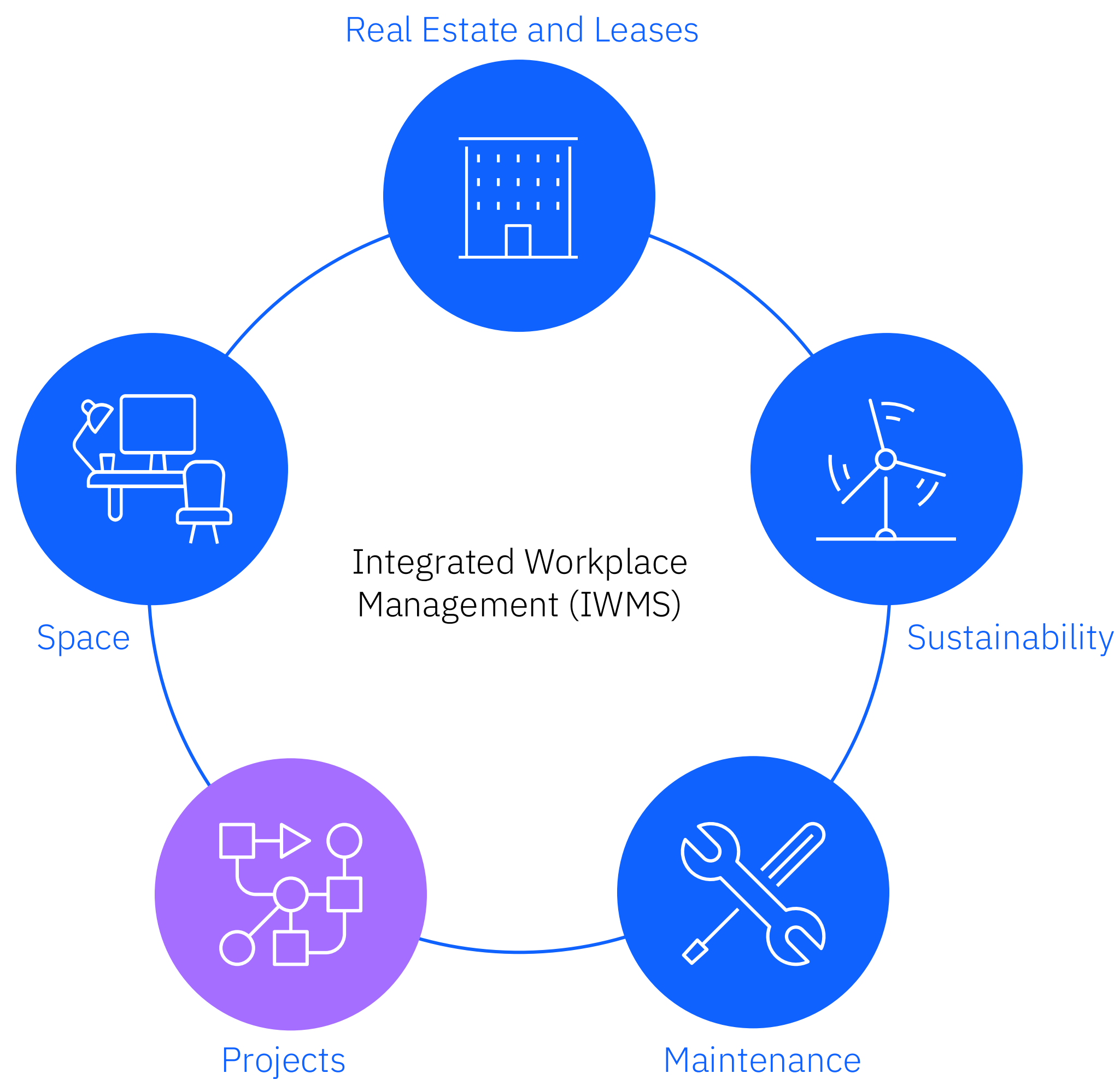


* Optional

Pre-built integrations will enable new use cases



Corporate Real Estate teams focus on five core capabilities across their portfolio



Comparative report for alternative funding scenarios

- Minimal funding without portfolio improvement
- Maintain average FCI
- Investment to improve to target FCI based on user criteria

IBM TRIRIGA

Funding Analysis Summary

Showing page 1 of 4

Go to page:

Open

IBM

Funding Analysis Summary

Year	Component Renewal	Replacement Value (CRV)	Replacement / Backlog / Deterioration								
			Option 1 (Minimal Funding)		Option 2 (Maintain FCI)		Option 3 (Reduce FCI)		FCI Thresholds		
			Funding	FCI	Funding	FCI	Funding	FCI	Good	Fair	Poor
2019	\$0.00	\$174,017,600.62	\$0.00	0.1221	\$0.00	0.1221	\$0.00	0.1221	0.050	0.100	>.1
2020	\$2,989,466.35	\$181,326,339.85	\$5,439,790.20	0.1104	\$3,321,494.82	0.1221	\$4,628,386.25	0.1149	0.050	0.100	>.1
2021	\$22,019,376.23	\$188,942,046.12	\$5,668,261.38	0.1986	\$22,365,349.90	0.1221	\$24,796,128.75	0.1019	0.050	0.100	>.1
2022	\$9,495,242.88	\$196,877,612.06	\$5,906,328.36	0.2198	\$9,855,747.43	0.1221	\$12,861,137.90	0.0863	0.050	0.100	>.1
2023	\$9,786,497.06	\$205,146,471.77	\$6,154,394.15	0.2408	\$10,162,142.81	0.1221	\$13,032,939.46	0.0718	0.050	0.100	>.1
2024	\$62,404.92	\$213,762,623.58	\$6,412,878.71	0.2147	\$453,827.79	0.1221	\$2,622,108.92	0.0609	0.050	0.100	>.1
2025	\$11,298,581.70	\$222,740,653.77	\$6,682,219.61	0.2386	\$11,706,444.33	0.1221	\$12,958,448.83	0.0544	0.050	0.100	>.1
2026	\$5,609,101.24	\$232,095,761.23	\$6,962,872.84	0.2364	\$6,034,094.11	0.1221	\$6,506,548.32	0.0513	0.050	0.100	>.1
2027	\$8,934,059.43	\$241,843,783.20	\$7,255,313.50	0.2469	\$9,376,901.99	0.1221	\$9,373,195.54	0.0503	0.050	0.100	>.1
2028	\$8,163,291.86	\$252,001,222.09	\$7,560,036.66	0.253	\$8,624,733.81	0.1221	\$8,412,599.46	0.05	0.050	0.100	>.1
2029	\$261,401.85	\$262,585,273.42	\$7,877,558.20	0.2278	\$742,224.36	0.1221	\$465,311.53	0.05	0.050	0.100	>.1
TOTAL Funding			\$65,919,653.61		\$82,642,961.37		\$95,656,804.96				
TOTAL Change in Facility Value			\$50,001,884.16		\$77,755,862.86		\$96,681,433.42				
Return on Investment (%)			-24.1472		-5.9135		1.0712				

Return on Investment % = ((Total Change in Facility Value-Total Funding)/Total Funding)*100

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Document Management: /TRIRIGA/Condition Assessment/Funding Analysis Summary (BIRT)

powered by IBM TRIRIGA

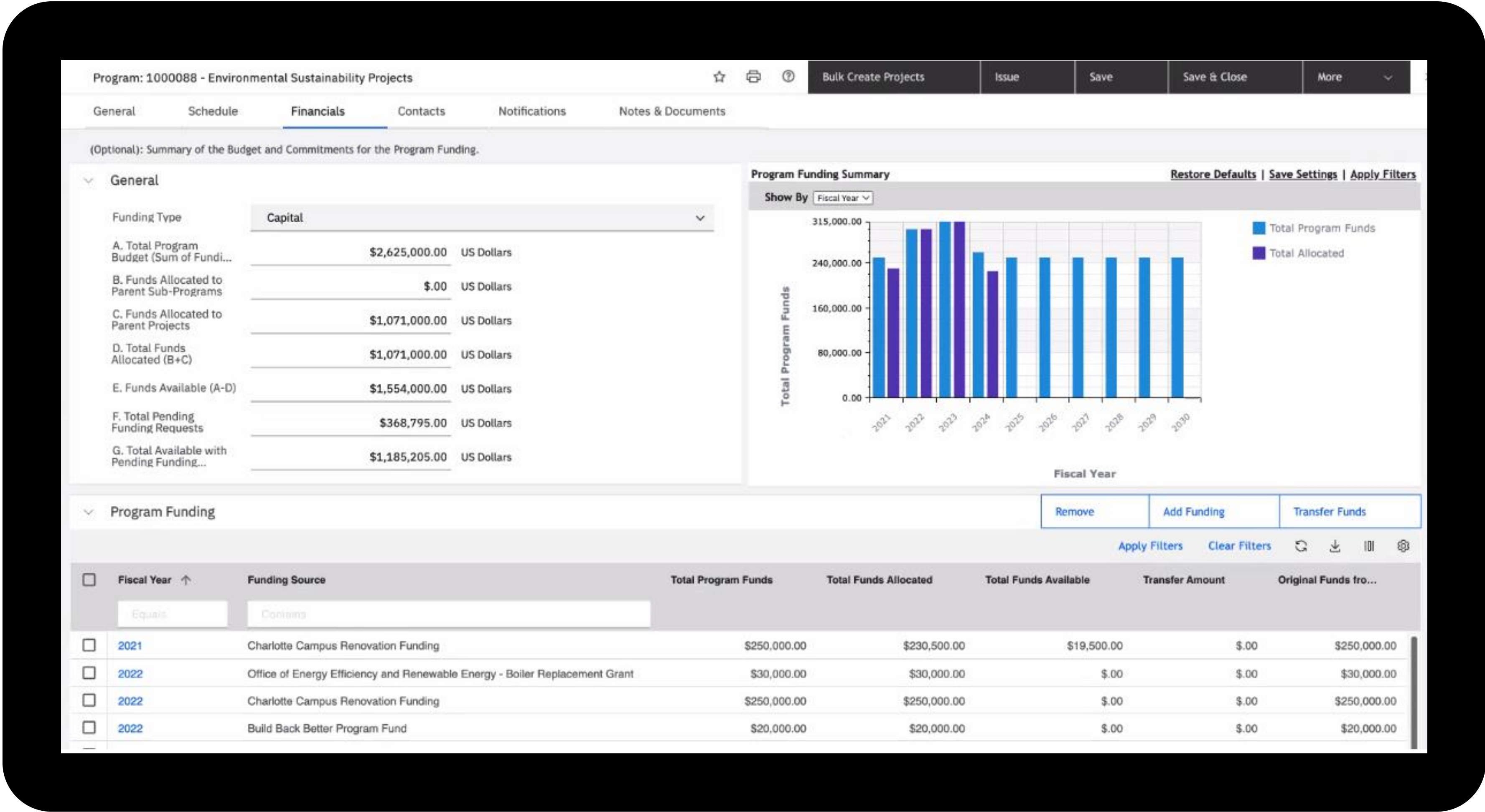
Minimized funding leads to further deterioration and negative ROI

Maintaining condition at current level still results in negative ROI

Optimal funding leads to improved FCI and positive ROI

Capital Projects allows program funding to be auditable through its lifespan

- Grand summary
- Budget vs. allocation graphics
- Yearly summary and breakdown



Soliciting, selecting and tracking tenders and vendor bids is core to executing projects

Vendor bid summaries

Home

Reminders

6 - Action Items

15 - Notifications

Quick Links

Document Manager

Bid Clarifications

Request For Information

Change Orders

Application For Payment

Quick Links

Create Request For Information

Create Contract Change Order

Pending Bid Responses

Completed Bid Responses

ID	Name	Description	Project Name	Status	Response Total Base
1000000	Cooling Tower GC Bid		1000575-Atlanta Office - ...	Awarded	\$62,550.00
1000002	3000 Exec Parkway Rela...		1000576-3000 Executive ...	Awarded	\$55,000.00
1000009	1000586-4141 Office Par...		1000586-4141 Office Par...	Revision In Progress	\$1,241,098.00
1000015	Carpeting Bid for CHI Office	Carpeting Bid for CHI Office	1000582-2185 N. Califor...	Issued	\$4,700.00
1000018	Fire Protection Piping inst...	Fire Protection Piping inst...	1000586-4141 Office Par...	Issued	\$298,107.00
1000029	Bid for Concrete and Steal	Beginning of Construction ...	1000581-Store 1367 Roo...	Issued	\$72,000.00
1000030	PHL08 - 203 N 34th St - S...	General Construction Bid	1000593-PHL08 - 203 N ...	Revision In Progress	\$164,160.00
1000031	PHL08 - 203 N 34th St - S...	General Construction Bid	1000593-PHL08 - 203 N ...	Revision In Progress	\$168,983.00
1000035	PHL08 - 203 N 34th St - S...	Store Front and Signage Bid	1000593-PHL08 - 203 N ...	Issued	\$2,840.00
1000037	Painting Bid	Bid for pe			
1000045	Wave City - Planning & De...	Planning			
1000048	Wave City - General Contr...	General C			
1000057	1000586-4141 Office Par...				

Procurement management at the tip of your fingers

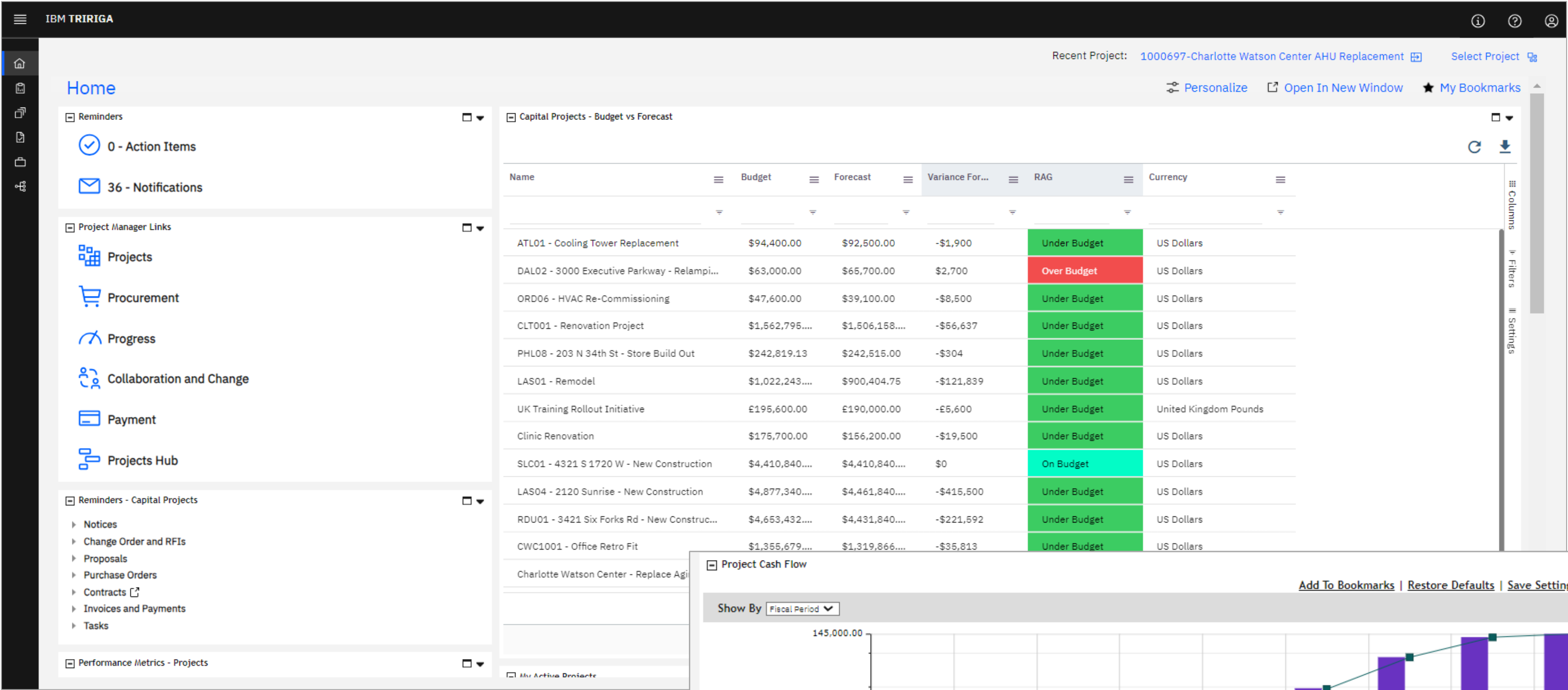
- Summary reports on vendors
- Manage multiple bids
- Evaluate bids
- Review bid clarifications

Comparative bid reports

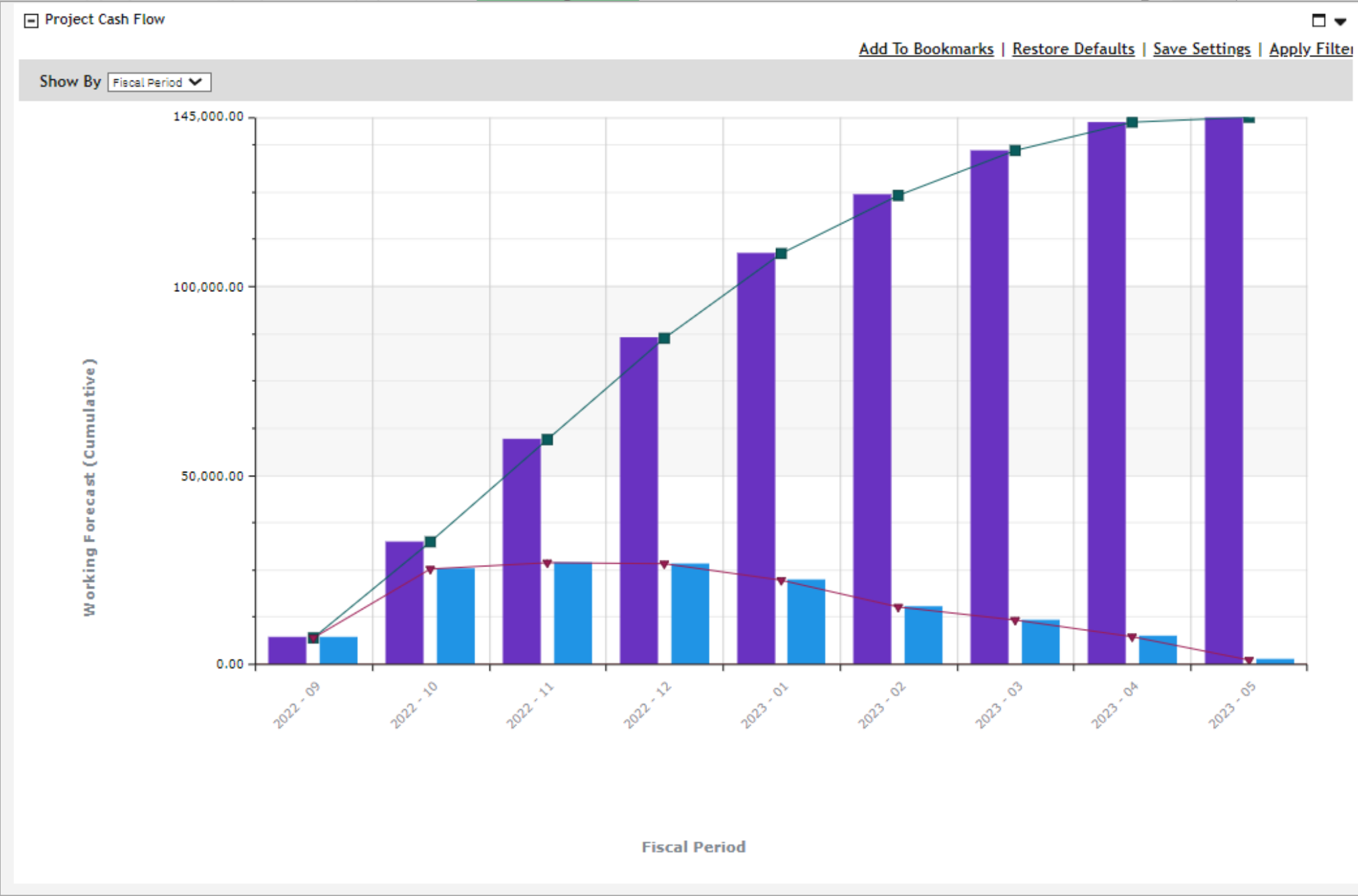
Side by Side Bid Analysis									
		Initial Estimate	Ace Construction		Ace Construction Company		Artillery Property Services		
1000586.01	General Requirements	\$ 43,200	\$ 0	-43,200	\$ 16,200	-27,000	\$ 12,100	-31,100	
1000586.04	Masonry	\$ 238,857	\$ 0	-238,857	\$ 310,060	71,203	\$ 323,400	84,543	
1000586.06	Wood and Plastics	\$ 22,891	\$ 0	-22,890	\$ 22,890	0	\$ 21,450	-1,440	
1000586.08	Doors and Windows	\$ 40,685	\$ 0	-40,685	\$ 65,090	24,405	\$ 62,679	21,994	
1000586.09.100	Metal Support Assemblies	\$ 62,400	\$ 0	-62,400	\$ 62,400	0	\$ 5,701	-56,699	
1000586.09.200	Plaster and Gypsum Board	\$ 6,702	\$ 0	-6,701	\$ 67,090	60,389	\$ 6,701	0	
1000586.09.300	Terrazzo	\$ 15,467	\$ 0	-15,466	\$ 12,667	-2,799	\$ 16,340	874	
	Tile	\$ 14,243	\$ 0	-14,242	\$ 11,465	-2,777	\$ 14,290	48	
1000586.09.600	Flooring	\$ 108,486	\$ 0	-108,486	\$ 101,438	-7,048	\$ 112,440	3,954	
1000586.09.700	Wall Finishes	\$ 5,940	\$ 0	-5,940	\$ 2,660	-3,280	\$ 6,250	310	
1000586.09.900	Paints and Coatings	\$ 28,838	\$ 0	-28,838	\$ 28,831	-7	\$ 27,990	-848	
1000586.13.850	Detection and Alarm	\$ 19,400	\$ 0	-19,400	\$ 12,670	-6,730	\$ 22,345	2,945	
1000586.15.300	Fire Protection Piping	\$ 92,138	\$ 0	-92,137	\$ 101,234	9,097	\$ 96,340	4,203	
1000586.15.700	HVAC Equipment	\$ 12,542	\$ 0	-12,542	\$ 16,678	4,136	\$ 11,554	-988	
1000586.15.900	HVAC Instrumentation and Controls	\$ 76,800	\$ 0	-76,800	\$ 79,767	2,967	\$ 62,440	-14,360	
1000586.16.050	Basic Electrical Materials and Methods	\$ 372,960	\$ 0	-372,960	\$ 368,090	-4,870	\$ 310,200	-62,760	
1000586.16.100	Wiring Methods	\$ 41,600	\$ 0	-41,600	\$ 40,908	-692	\$ 44,600	3,000	
1000586.16.200	Electrical Power	\$ 13,853	\$ 0	-13,853	\$ 13,853	0	\$ 12,290	-1,563	
1000586.16.300	Transmission and Distribution	\$ 77,489	\$ 0	-77,488	\$ 77,198	-290	\$ 71,988	-5,500	
Grand Total		\$ 1,294,491	\$ 0	-1,294,490	\$ 1,411,189	116,699	\$ 1,241,098	-53,392	

Dashboards help project managers monitor status across all projects

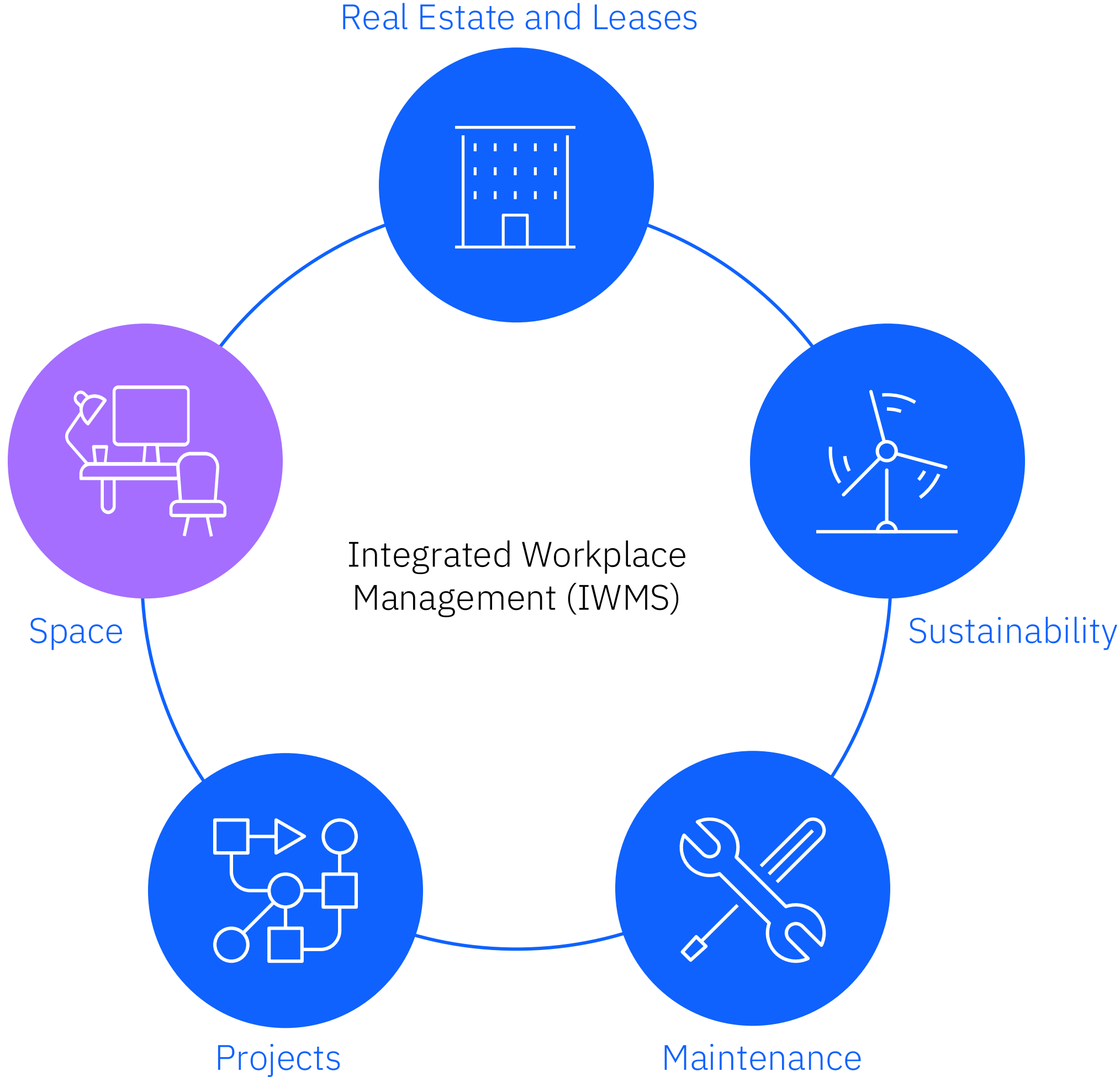
Project and budget details



Manage project cash flows

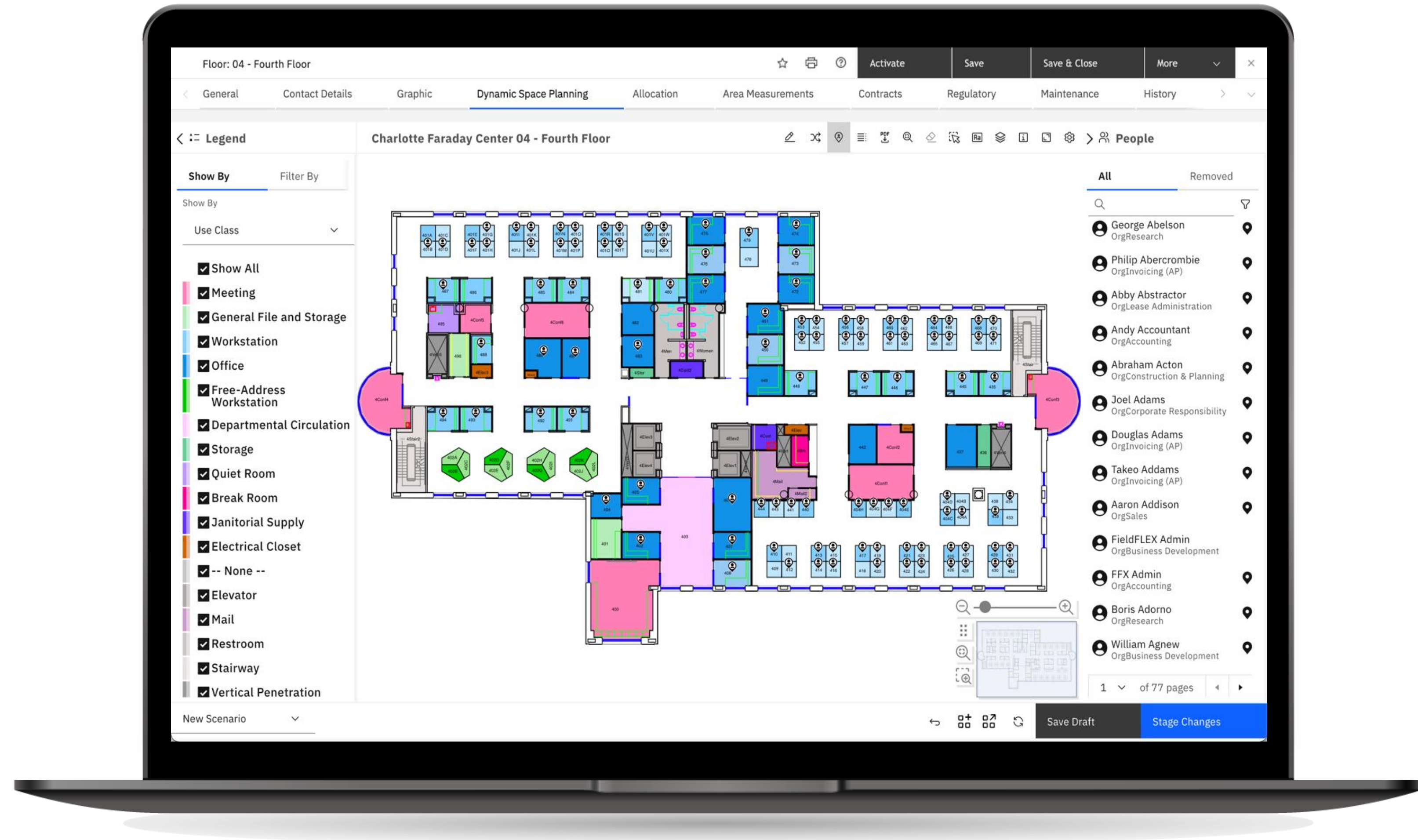


Corporate Real Estate teams focus on five core capabilities across their portfolio



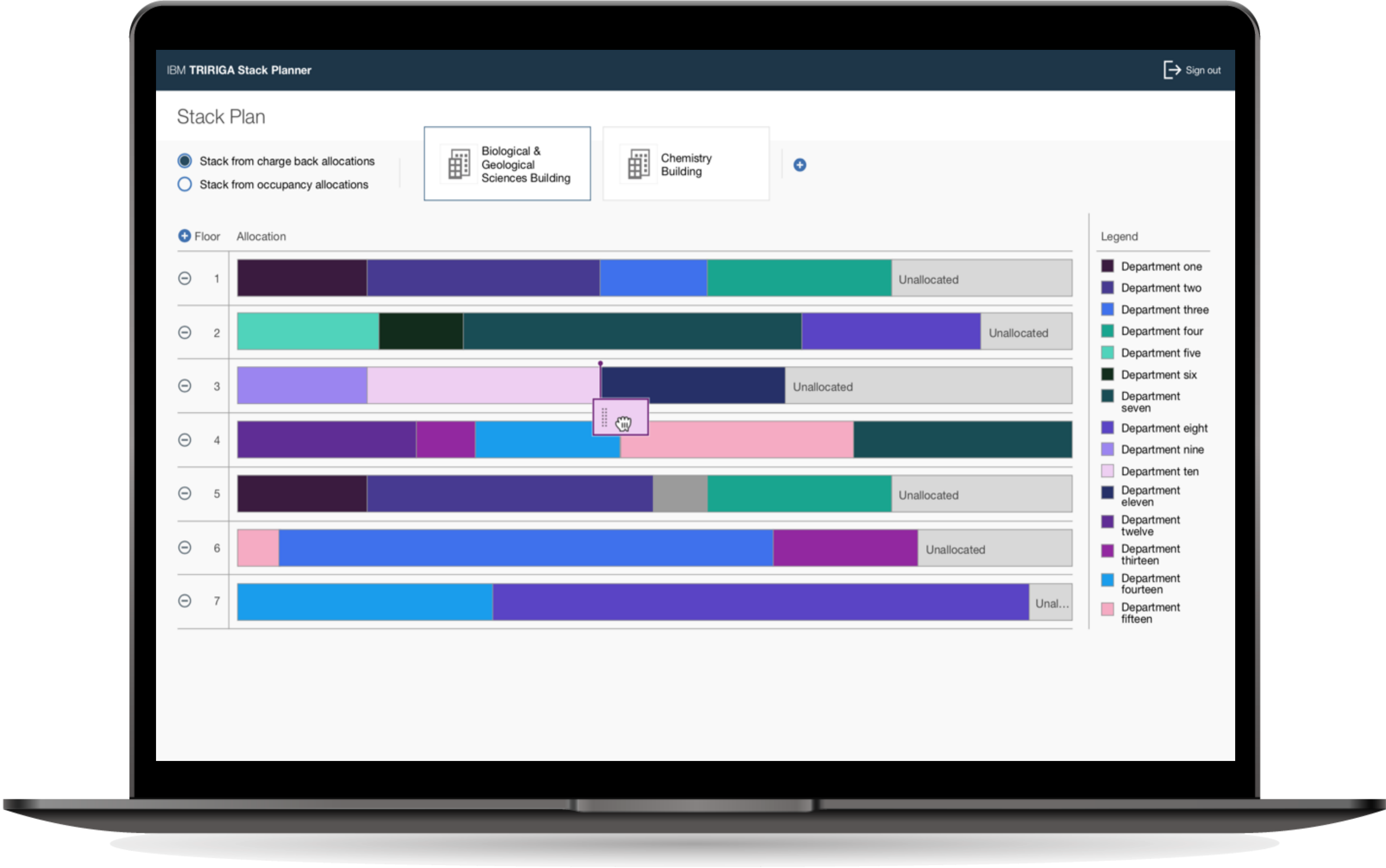
Dynamic space planning helps planners adapt quickly to changing guidelines

- Create scenarios to **graphically analyze** floors for social distancing
- Update space classifications
- Rearrange seat assignments
- Rearrange organizational allocations
- Designate spaces as reservable or dedicated
- Update active portfolio details directly from **“what if” scenarios**



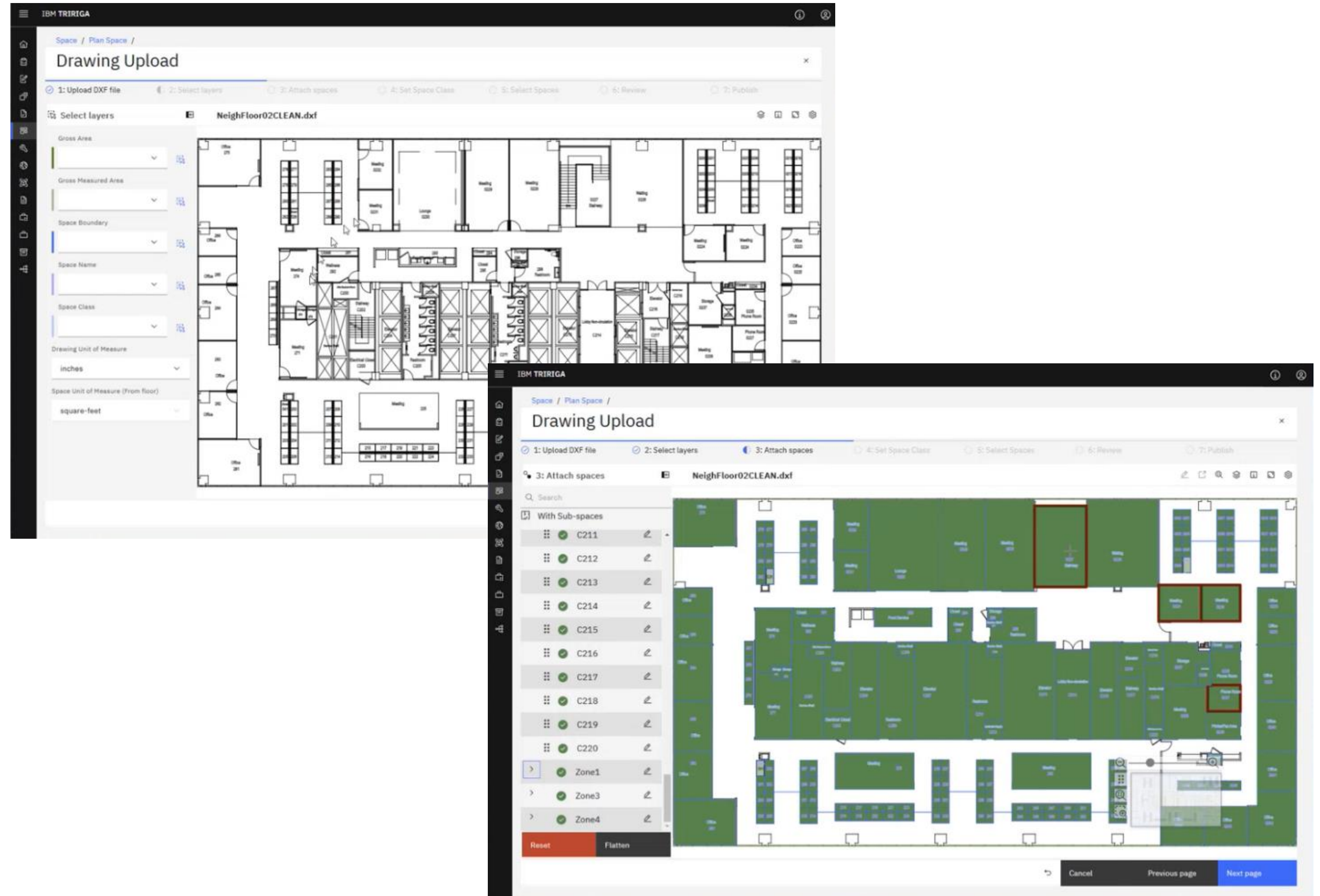
Space Planners need tools for making the right space available to the right people

The perceptive Stacking app enables Space Planners to quickly re-stack space plans to enable optimal workspace configurations



New Drawing Manger App allows browser-based publishing of drawings

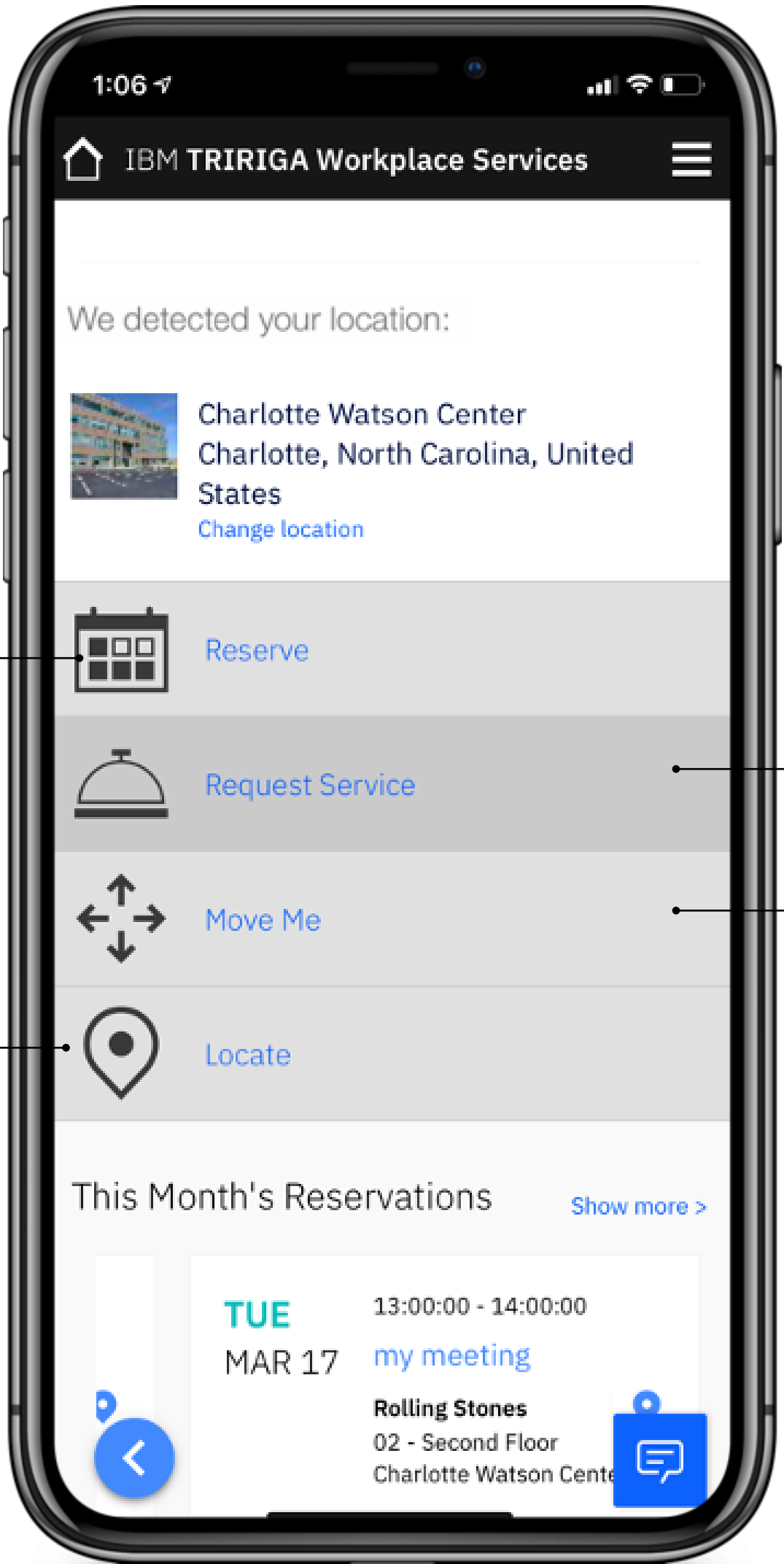
- Import new CAD drawings (DXF files) without using CAD or BIM Integrator
- Assign CAD Layers from a drop down to Space Management Business Objects
- Create new spaces
- Maintain space hierarchy through drag and drop – quickly add new spaces to zones



Occupants can self manage through a single app

[Reserve](#) app enables employees to reserve individual work and team meeting space

[Locate](#) app enables users to find colleagues and rooms

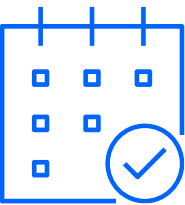


[Service Request](#) app enables easy work request submission

[Move Me](#) app allows employees to self-select their assigned work location

Desktop/tablet designs for the portal and apps provide a **responsive design** for power users on larger screens

Reserve rooms and desks on the go



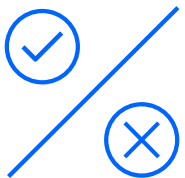
Book a desk next to your colleague



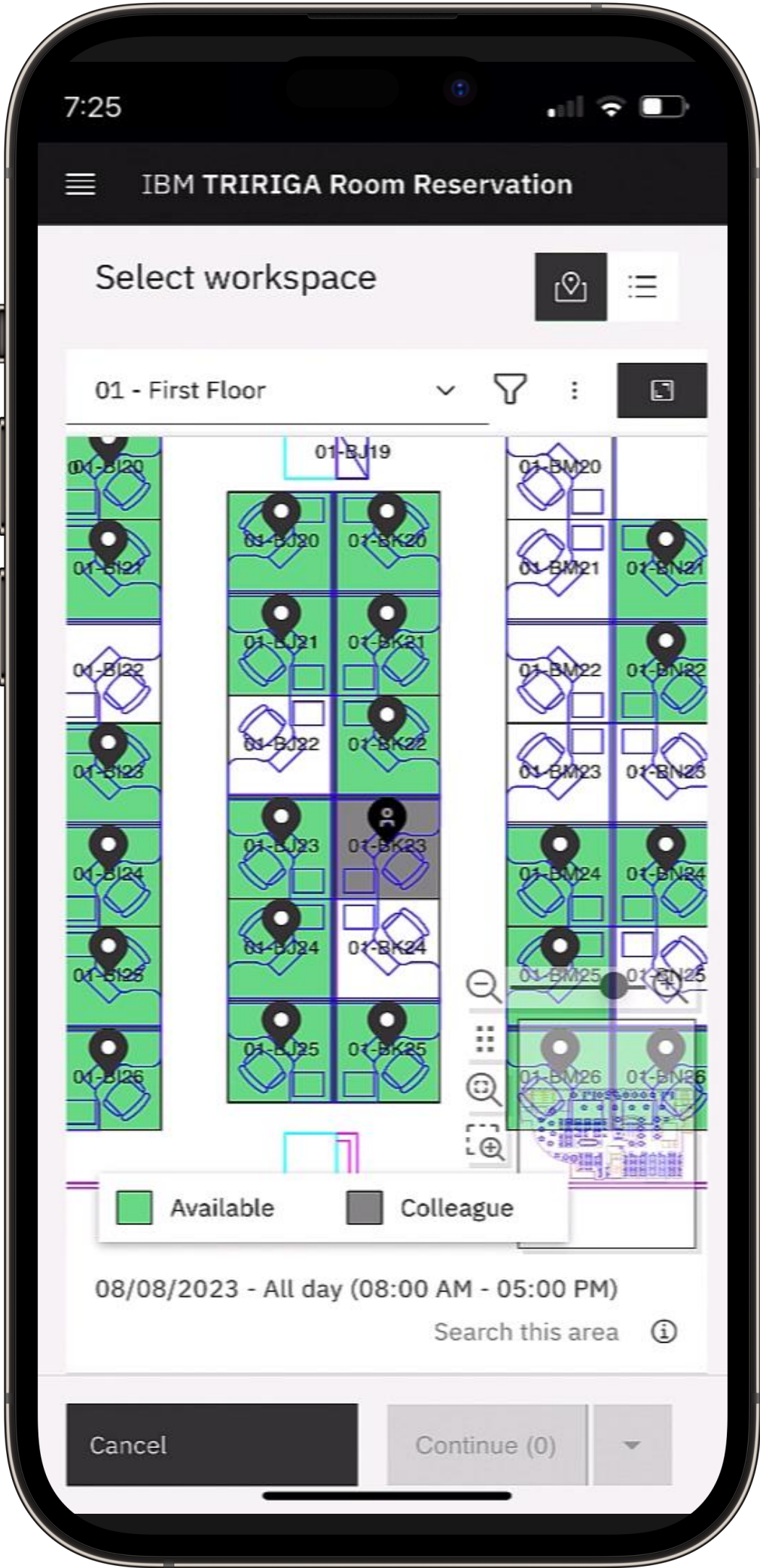
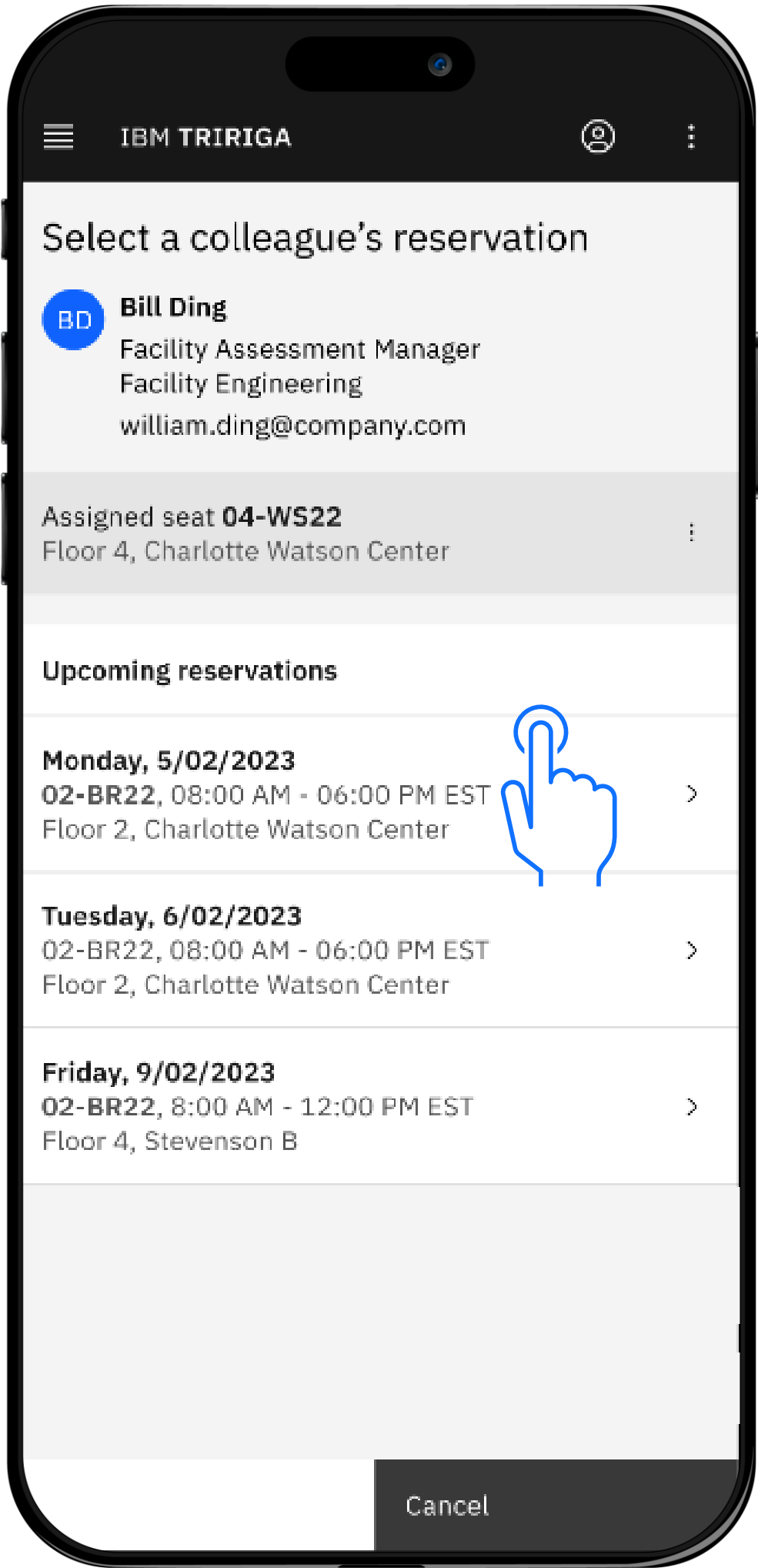
Add catering ,request equipment or room layout change to meeting invite



Identify owner of meeting reservation



Fully integrated with Exchange

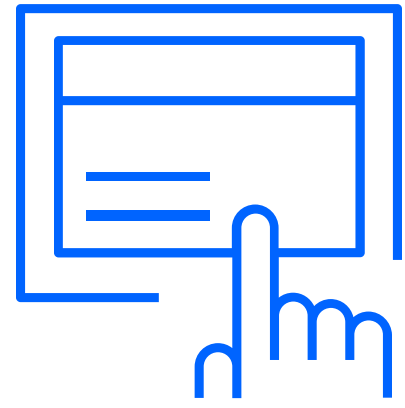


Enhance Digital Services for occupants and visitors

- Indoor wayfinding and navigation to easily navigate through spaces and increase productivity
- Locate points of interest, rooms and colleagues
- Access through a kiosk or employee mobile app
- Powered by Esri ArcGIS



Room panel interface enables on-the-spot booking of meeting rooms

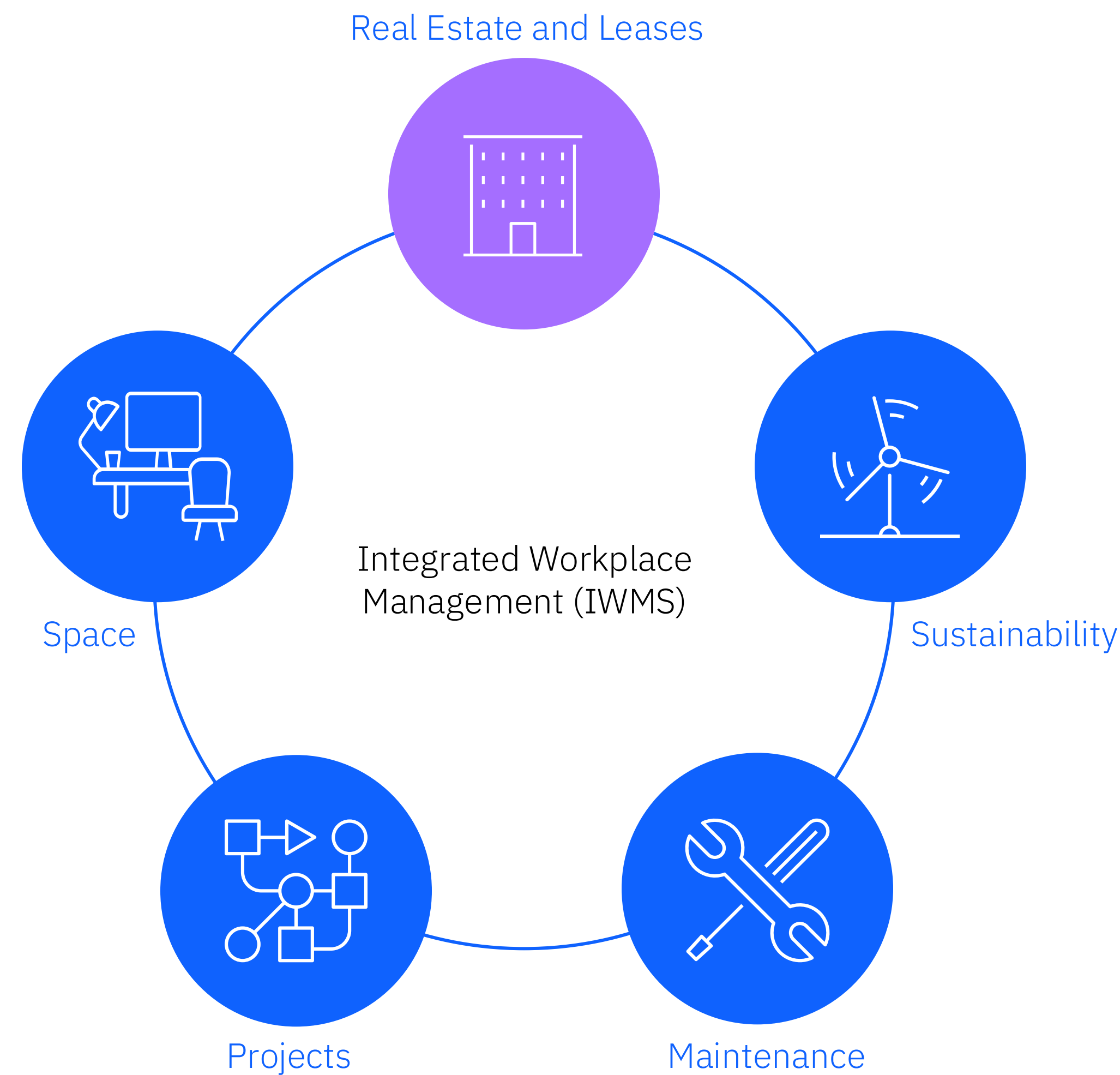


Meeting Room Panel

- Fast and responsive booking
- Visual display of current room status
- Enables user check-in
- Integration with Exchange enables seamless resource scheduling



Corporate Real Estate teams focus on five core capabilities across their portfolio



Delivers a complete solution for compliance and real estate portfolio performance

Helps Lease Management executives [comply with and administer standards](#) including IFRS 16, ASC 842, GASB 87, GASB 96

Helps Real Estate executives' [chart and transform the future](#) course for institutions with the confidence of their stakeholders



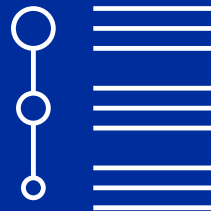
Contract Management

- Contract Abstraction & Creation
- Contract Maintenance
- Lease Administration
 - Payment Processing
 - OPEX Management
 - Lease Contract Review
 - Payment Adjustments
 - Critical dates
 - Alerts and Notifications



Lease Accounting

- Supports the provisions, accounting treatment & disclosure reporting requirements
- Activations & subsequent accounting:
 - Adoption & Look Back
 - Lease Term
 - Lease Liability & ROUA
 - Lease Receivable & DIOR
 - Interest Expense & Amortization
 - Lease Revenue
 - Roll Forward Reports & Audit Support
 - Disclosure Reports



Portfolio Management

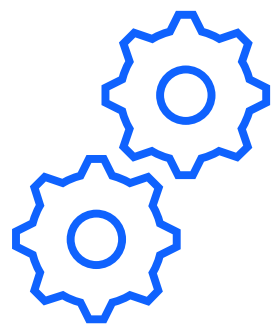
- Portfolio planning for Real Estate strategic plans and goals
- Transaction Management
 - Create implementation plans with financial targets
 - Create action plans
 - Create transaction plans with market data, contacts, project tasks and CTQ dates
 - Create action requests



Strategic Real Estate Management

- Sustainability, energy and environmental management
- Facilities maintenance
- Capital projects
- Facilities and space optimization

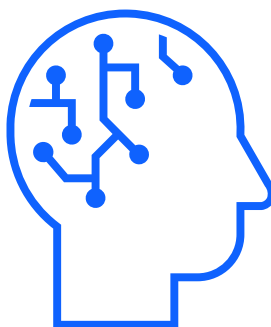
Uncover lease information using GenAI



Leverage natural language to discover information related to the leases managed in Real Estate and Facilities



Query unstructured source documents to uncover lease details not normally abstracted during the lease abstraction process



Save time and money leveraging Gen AI to assist with lease abstraction activities

[illegible]

Complaint

Lease File: Lease Agreement dated 09_18_2012.pdf

Lease Type: Lease

Landlord: [REDACTED] LLC

Tenant : [REDACTED] Inc.

Assignor: Not assigned

Enter your question

Can the tenant have early access to the premise?

Summary

Context

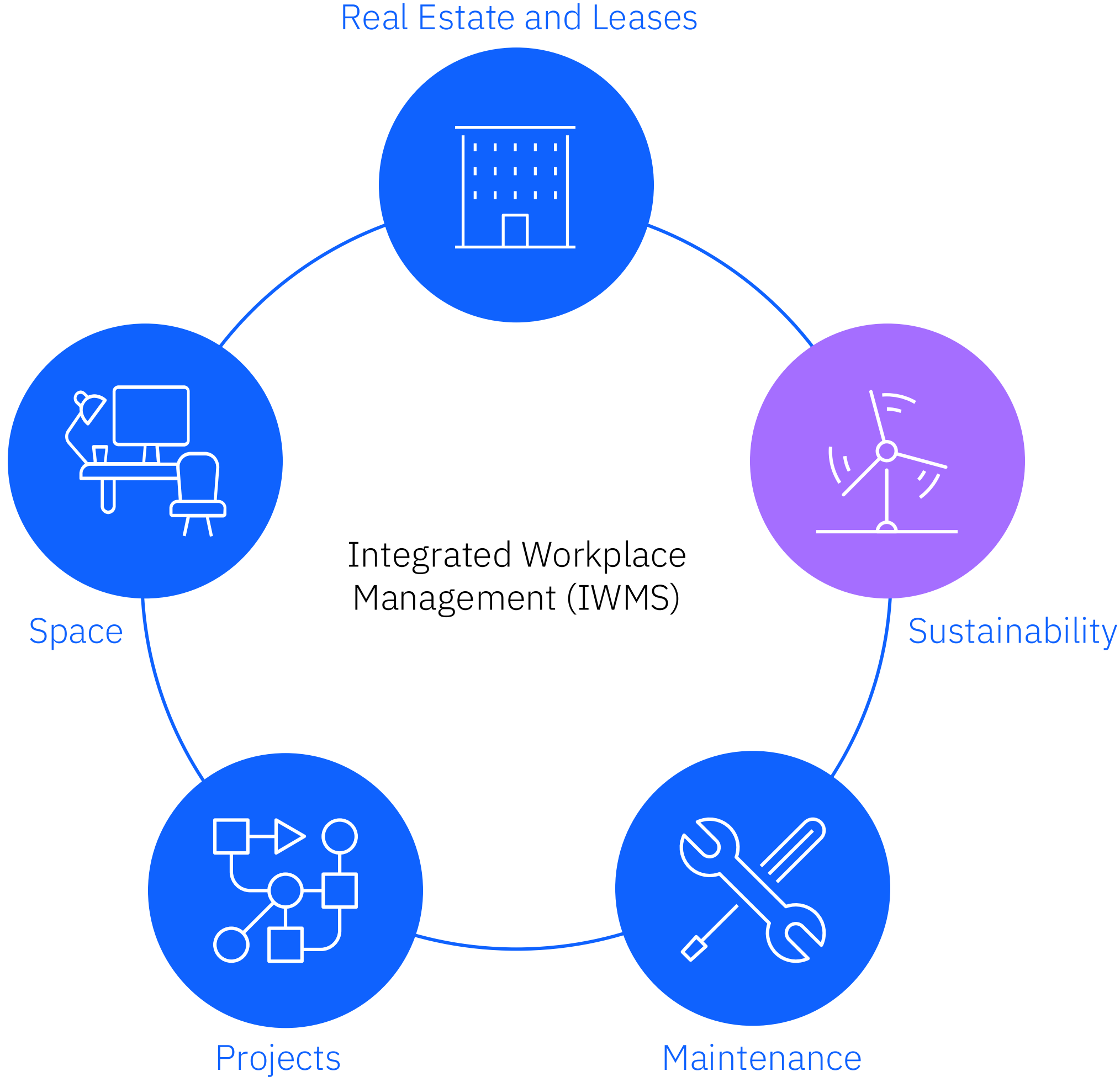
Yes, the tenant can have early access to the premises, but it is s

evidence of compliance with insurance obligations, and the ea

for paying for any other Building services requested during the

dated 09_18_2012.pdf", page_numbers: [7, 7, 7])

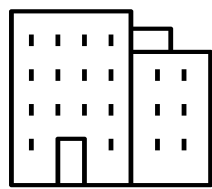
Corporate Real Estate teams focus on five core capabilities across their portfolio



There are opportunities to improve sustainability throughout real estate **lifecycle processes**

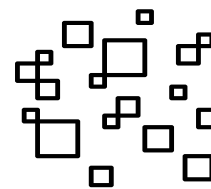


Operationalize and track sustainability across the facility portfolio



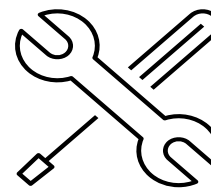
Facilities

Corporate Real Estate
evaluates the building envelope structurally and related metadata such as location risk, design, lease terms and age to develop options for longer-term viability



Systems / Components

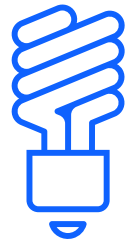
Facility Management
determines when components, sub-assemblies and systems should be replaced with updated design or require preventive maintenance for optimal functioning



Operations

Facility Management and IT enable workforce transformation to improve the efficiency, digital optimization and execution of maintenance and major upgrade efforts

Energy Monitoring through data collector interfaces in Maximo Monitor



- Quickly understand energy performance of buildings across the portfolio
- Data contextualized with occupancy data to improve operational efficiencies
- Edge data collector allows for fast and easy data acquisition from HVAC and power meters
 - Vast library of pre-configured device connectors to cut down rollout time
 - Ensure device data is uniform and comparable regardless of the source

Examples of device OEMs supported in the data collector library

Combine IoT, BMS and external data sources in a single dashboard

