INTERNATIONAL STANDARD

ISO
41015

Facility management — Influencing organizational behaviours for improved facility outcomes

Facility management — Influencer les comportements organisationnels pour obtenir de meilleurs résultats en matière d'installations

iTeh STANDARD PREVIEW
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ISO 41015:2023
https://standards.iteh.ai/catalog/standards/sist/cb21c928-ad52-4837-8bb5-
b2375823ce65/iso-41015-2023

Contents

Foreword

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The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

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For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 267, *Facility management*, in collaboration with the European Committee for Standardization (CEN) Technical Committee CEN/TC 348, *Facility Management,* in accordance with the Agreement on technical cooperation between ISO and CEN (Vienna Agreement).

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

This document is intended for owners, operators and service providers (internal and/or external) at a facility. It identifies the different ways in which facility improvements can positively influence behaviours which can increase the contribution of the facility to the demand organization. While behaviours are subjective, guidance on how these can be clearly specified and measured will enable a collective, collaborative and common objective to be reached by all parties. Influencing behaviour should be seen in the context of the ways in which individuals act or conduct themselves.

Efficient and effective facility management (FM) will ultimately fulfil the demand organization's requirement for optimal performance and allow for a more agile organizational approach. The organization should be able to determine the potential impact that its approaches have on meeting the demand organization's mission so that the organization can align and deliver its services accordingly. This document provides guidance on the appropriate operation of the facility so that its contribution to meeting the demand organization's mission and goals can be clearly specified and measured.

Annex A provides examples and more guidance related to the specific clauses.

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Facility management — Influencing organizational behaviours for improved facility outcomes

1   Scope

This document gives guidance on the ways in which a facility management (FM) organization can influence organizational behaviours to achieve improved facility outcomes, including how it can engage, empower and influence users, service providers and other interested parties with one another for improved outcomes and user experience while interfacing with the built environment.

Consequently, and simultaneously, these behaviours can be harnessed to contribute to the achievement of the demand organization's objectives and goals in an organizational sense, regardless of the type of organization or built environment involved. This is the fundamental link to the role of FM as defined in ISO 41001.

This document is intended to build upon the requirements in ISO 41001, which adheres to the Plan-Do-Check-Act methodology.

This document is applicable to organizations both large and small.

NOTE 1   For the purposes of this document, the term "organization" refers to the FM organization unless otherwise stated.

NOTE 2   The terms "facility management" and "facilities management" can be used interchangeably.

2   Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 41011, *Facility management — Vocabulary*

3   Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 41011 and the following apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at https://www.electropedia.org/

3.1
organizational behaviour
result of how interested parties interact with one another and the built environment within a demand organization

Note 1 to entry: These interactions subsequently influence how the demand organization itself behaves and how well it performs.

3.2
outcome
final result or consequence of an *output* (3.3)

Note 1 to entry: Outcomes and outputs may affect each other through a circular process.

3.3
output
end product or service of a process

Note 1 to entry: Outputs and *outcomes* (3.2) may affect each other through a circular process.

3.4
value driver
factor that has perceived worth to the demand organization or interested party

4   Context of the organization

4.1   General

The organization supports the demand organization in circumstances determined substantially by behaviours in the demand organization. To deliver value to the demand organization, the organization should identify, align with and give prompt priority to demand organization needs and initiatives. These may arise from external or internal issues.

4.2   Understanding the organization

The organization has a direct role in the delivery of outputs supporting the core business of the demand organization. It also contributes to the outcomes and competitive advantage of the demand organization. The organization is situated to influence demand organization behaviours, actions and decisions that can affect the achievement of demand organization goals in areas such as economy, productivity, resilience and reputation.

The organization should determine the potential impact that FM processes and activities have in carrying out the mission of the demand organization. It should recommend policies and processes that have potential for successful performance within the constraints of the demand organization context, and consistent with demand organization culture.

The organization should communicate to the demand organization the context in which it operates and its FM strategy, and the FM impact on elements such as:

— mission;

— vision;

— values;

— infrastructure;

— workspace;

— processes;

— marketing relationship;

— attracting and retaining talent;

— people development;

— communication;

— sustainability;

— health and safety;

— finance;

— risks and opportunities;

— compliance;

— performance;

— executive team;

— productivity;

— culture;

— technology;

— quality;

— geopolitics;

— innovation.

In addition, the organization should map the external and internal issues that can impact or influence the demand organization. These factors can include the following:

— External context: economic, social, spatial and environmental issues, as experienced by end users at present and in the foreseeable future.

— Internal context: people (user experience, organizational culture), place (image, collaboration, flexibility, cost) and process (productivity, reliability, innovation) issues.

To map the external and internal issues that apply to FM and the impact outcomes sought by the demand organization, the organization should remain aware of current demand organization principles, policies, strategies and initiatives

The organization should periodically identify how external and internal issues impact and influence demand organization behaviours and actions, and facility user experiences and outcomes, throughout the facility life cycle and across strategic and tactical levels of operation.

4.3 Identifying organizational strategic goals and objectives

4.3.1 General

The organization should identify the demand organization goals and objectives that can be influenced to achieve positive outcomes and user experiences. The organization should determine goals, objectives and targets, including factors critical to success, their measurement and the environment for achieving them. To do so, the organization should remain familiar with and align with demand organization goals and objectives, and the interested parties affected. The demand organization should support the organization with information pertaining to its goals and objectives.

4.3.2 Aligning with organizational goals

In preparation for influencing behaviour, the organization should map how its business approaches, activities and practices can affect the achievement of demand organization goals and objectives. It should then recommend changes, as necessary, to ensure that FM can provide effective support.

Changes to organizational policies, processes or procedures should be considered whenever a misalignment between goals and anticipated results becomes evident. The organization should also consider incidental impacts on existing outputs when proposing a change. The effectiveness of this provision can be enhanced by the use of scheduled reviews.

When working with goals, objectives, operating principles and approaches, the organization should adopt the same business terminology as used by the demand organization. This also applies to subsequent control, planning and monitoring activities.

4.4 Demonstrating and communicating value

Before the organization can influence organizational behaviour, it should demonstrate its value as a key interested party to the demand organization.

The organization may demonstrate value as a key interested party by:

— aligning outputs and outcomes achieved with organizational goals, targets and objectives;

— negating, mitigating or transferring organizational risk;

— reducing direct costs;

— improving efficiency and productivity;

— delivering intangible or indirect value by enhancing reputation through facility appearance, business conduct and interactions with the community.

5 Influencing behaviour

5.1 General

The organization should align itself with the demand organization's goals.

The organization should acquire and maintain a clear and thorough understanding of demand organization needs and expectations. Then, it can identify how to influence behaviour to meet them.

5.2 Ability to influence

Changes in conditions, processes, provisions, policies and attendant behaviours are often involved in reaching objectives at all levels. When a need for change is identified, the organization should carefully consider how to approach implementation. Methodologies should be appropriate in scale to the desired change and should facilitate the ability to adopt the desired behaviour. Clause 6 discusses planning for change in more detail.

The organization should recognize that influence is founded upon:

— how the organizational culture shapes decision-making and behaviour;

— professional attitudes, motivations and skills;

— the level of maturity of the organization;

— the relationship of the FM staff with facility users and others with a stake in facility operation.

The organization should self-assess to identify its level of maturity and competence to influence interested parties. Principal areas to develop are key relationships (see 5.3), principles of behavioural change (see 5.4), perception of value (see 5.5) and identifying opportunities to influence (see 5.6).

5.3 Developing key relationships

Often, the ability to influence behaviour is dependent on the relationship between the influencer and the interested party. This relationship determines the degree to which interested parties can be influenced and the extent to which the behavioural change can be achieved.

The influencer (i.e. the organization) should be perceived as authentic, trustworthy, reliable, responsive, relatable and knowledgeable.

Information and communication are key to developing relationships of influence. The information should communicate the purpose, desired outcomes and benefits, as applicable to the demand organization and relevant interested parties.

The organization should identify and map relevant interested parties and other requirements that can impact the demand organization's ability to achieve its strategic goals. These can include, but are not limited to:

— functional areas within the demand organization, including:

— leadership;

— finance;

— procurement;

— human resources;

— information technology (IT);

— risk management;

— environment and sustainability;

— public relations;

— legal and regulatory requirements;

— government and community officials;

— service providers;

— customers and clients.

The organization should focus on developing relationships with key interested parties to ensure that:

a) it understands the motivations and drivers of each interested party;

b) interested parties understand how the organization can support the achievement of shared goals.

These interested party relationships are key to achieving behavioural change when a higher level of engagement is necessary to achieve the desired outcome.

5.4 Behavioural change

Behavioural change occurs when an interested party demonstrates a change in thinking and approach to a situation to achieve a different outcome.

The organization should consider how its own business approaches and practices can facilitate the adoption of desired behaviours. By doing so, the organization can ensure that it is not placing undue burden for change on the interested party.

The organization should consider, for example, the following:

— Can the desired outcome be achieved through automation? If so, this does not require action on the part of the interested party. However, the organization should communicate the value to the demand organization as a result of the processes.

— Can the desired outcome be achieved by changes to the physical environment? Even subtle changes can influence individuals to act in a desired manner. Environments free of debris and signs of

deterioration prompt individuals to maintain the desired state. Appropriate signage supports wayfinding. Again, communicating the value of these initiatives increases the understanding of the FM value among interested parties and, as a result, expands its ability to influence future change efforts.

— Does achieving the desired outcome require a high level of engagement from the interested party(ies)? In this case, a change management process can be necessary. The organization should assess its competency in this area.

The change management process should consider what motivates the behaviour of end users and other interested parties. When the motivating factors are understood, the ability to alter the current situation as part of a change management process is simplified.

Whether the change sought will be mandatory or optional can affect the form, timing and level of engagement when planning and implementing a change.

5.5   Value drivers

5.5.1   General

Value drivers can be considered as factors that motivate or influence the demand organization and associated interested party behaviour.

By aligning processes and practices with value drivers, the organization can increase its ability to influence behaviour to achieve valuable objectives and desired outcomes. Being clear about value drivers enables behavioural change to be focused on results, leading to the outcomes envisaged by the demand organization.

This document suggests 15 value drivers for use by the organization to influence the demand organization or interested parties, see Table 1.

Table 1 — Value drivers for organizational influence

Category	Value driver	Realization examples
People	1. Satisfaction	Establishing and maintaining reliable, accessible, even-handed, consistently applied, smoothly integrated, progressive, and objective policies and processes.
	2. Image	Advancing positive perceptions, internal and external, among interested parties, the public, the media and other organizations including competitors and government.
	3. Culture	Demonstrating human-centred culture by encouraging knowledge, proficiency, communication, collaboration, resilience, inclusion and diversity. Preferring process analysis and improvement over politics of blame. In interactions, communications and policies, emphasizing knowledge, proficiency, collaboration, resilience, inclusion and diversity. Utilizing analysis and process improvement to affect how people experience the facility.
	4. Wellness and safety in the workplace	Establishing and maintaining active health and safety policies and programmes responsive to staff, customers and contractors/suppliers, and anchored in mission.
a Product is synonymous with service.		
NOTE The value drivers are adapted from Reference [5].		