Casestudies

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PCSG advises on Sainsbury's Digital Estate

Client
Sainsbury's Property Division

Client Estate
An extensive and diverse portfolio of over 3000 assets including Sainsbury's supermarkets and convenience stores, Argos, Habitat, petrol stations, offices, depots and residential units.

The Challenge
▶ To improve Sainsburys information management
▶ To respond to key business changes:
  ● Change in the nature of property interventions and investments
  ● Acquisition of Argos and Habitat

PCSG's Role since 2016
▶ Advising Sainsbury's Property Division on the strategic direction of its Digital Estate programme and asset information management
▶ Steering, developing and implementing projects, processes, technology and best practice standards to achieve these programme aims

Client Benefits
▶ Significant operational savings through more efficient information management
▶ Organisational agility and better informed business decisions through reporting, innovation and opportunities identification
▶ Risk reduction by using accurate, complete, easy to access information

"Mark and his team's advice has been, and continues to be, invaluable. It has ensured that our Business Collaborator implementation is built on a robust asset data architecture and also that our data can be maintained and protected going forward" – **MIKE BARBER, SYSTEMS DEVELOPMENT MANAGER – PROPERTY DIVISION**

Why PCSG
Sainsbury's sought PCSG's guidance due to our reputation and expertise at the forefront of the drive to digitise the construction industry. Our commission began as a review of Sainsbury's information systems and Building Information Modelling (BIM) aspirations, but has since grown to defining, steering and delivering a wide-ranging Digital Estate programme.

Our key strength is our combination of in depth knowledge of digital systems and personal construction industry experience. We can draw team members from a pool of diverse skill sets to suit the varying unique project requirements - our Sainsbury's team included highly experienced specialists in business systems, data structures, best practice and processes, project management and communications.

Key Support Areas

▶ Information Management Best Practice – process and technology
▶ BIM Subject Matter Expertise
▶ Alignment to UK and International Standards
▶ Stakeholder Engagement
▶ Strategy and roadmap
▶ Project and Programme Management
▶ Specialist resource to support internal team
▶ Business Change Support
▶ Asset Hierarchy and Data structures
▶ Review and Introduction of Standards and Processes
▶ Vendor engagement
▶ New Common Data Environment (CDE)
▶ Enhancements to and linkages between existing systems
▶ System Customer Support

Business Need: The business need is the foundation for all projects and people, process and technology interventions. Projects are developed in line with business requirements and regularly assessed accordingly.

People: Staff engagement at all stages is essential to successful implementation – from user discovery and requirements development through to training and communications.

Processes: Processes, standards and governance are developed in line with business aims, user needs and technology functionality.

Technology: Technology and systems underpin business activities. They should be designed and implemented to allow users to work efficiently, protect critical information and enable collaboration.

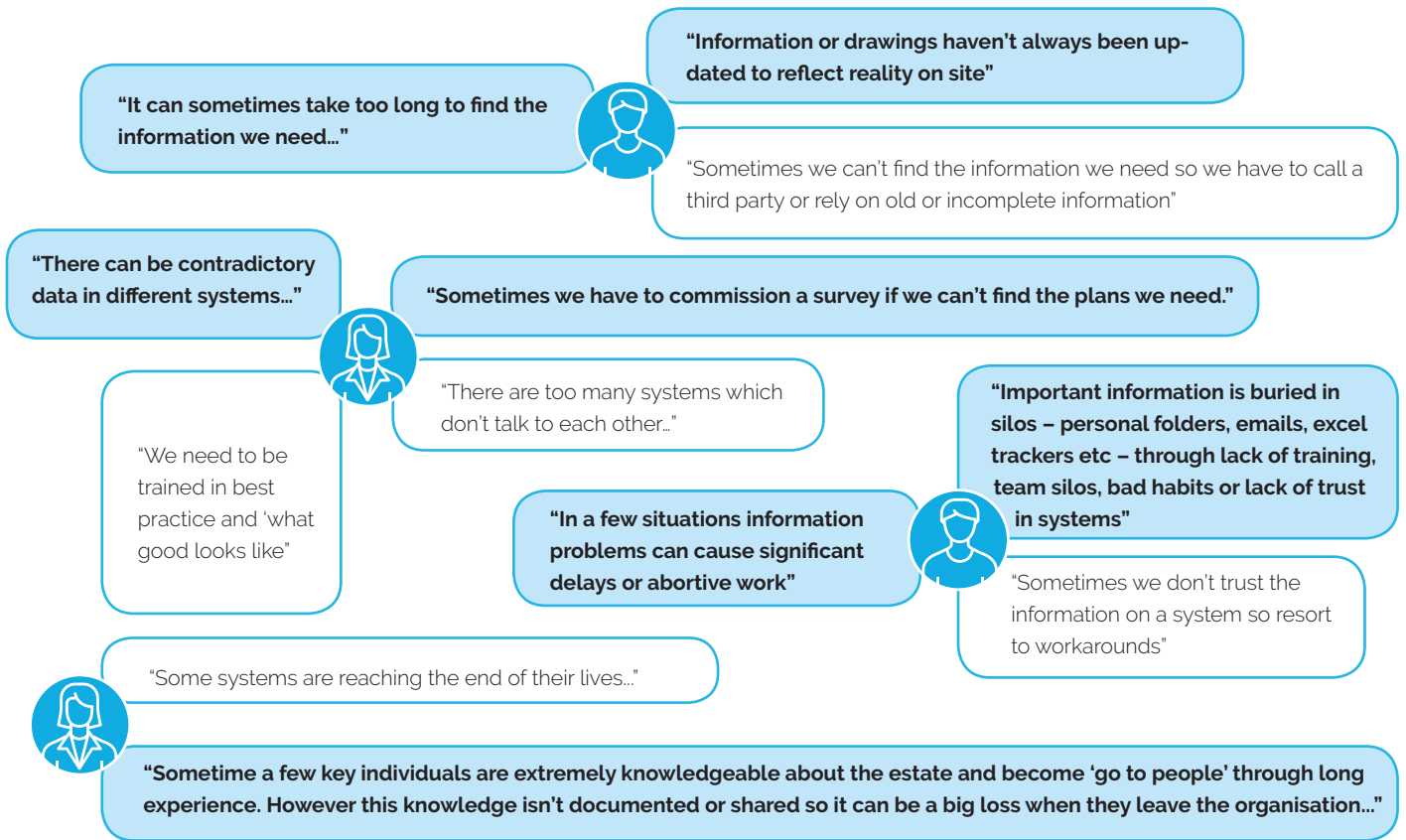| £ Significant operating savings	3000 Over 3000 assets	1000 Over 1000 users across multiple systems	Circa **7000** projects in 2016/2017	Over **1.5 Million** documents

Business Need and Vision

The Business Need

Sainsburys Property Division uses information (data, documents and drawings) to manage, maintain and develop a large and fast changing portfolio of both trading and non-trading buildings, land and infrastructure. Property activities include daily operations and maintenance; projects and programmes of work to bring efficiencies, improve or build new stores; and contributions to the wider corporate strategy.

To meet changing retail needs, Sainsbury's has moved from primarily new build capital projects, to smaller frequent interventions in stores, putting pressure on existing systems and processes. Over time, information has become difficult to keep up to date and has been stored in multiple silos or managed by different individuals or third party companies. In parallel, information management systems also need to respond to significant business changes such as the acquisition of Argos and Habitat in 2016.

Typical Information Challenges

Sainsbury's faced many information management challenges typical to large organisations:

"It can sometimes take too long to find the information we need…"

"Information or drawings haven't always been updated to reflect reality on site"

"Sometimes we can't find the information we need so we have to call a third party or rely on old or incomplete information"

"There can be contradictory data in different systems…"

"Sometimes we have to commission a survey if we can't find the plans we need."

"There are too many systems which don't talk to each other…"

"Important information is buried in silos – personal folders, emails, excel trackers etc – through lack of training, team silos, bad habits or lack of trust in systems"

"We need to be trained in best practice and 'what good looks like"

"In a few situations information problems can cause significant delays or abortive work"

"Sometimes we don't trust the information on a system so resort to workarounds"

"Some systems are reaching the end of their lives…"

"Sometime a few key individuals are extremely knowledgeable about the estate and become 'go to people' through long experience. However this knowledge isn't documented or shared so it can be a big loss when they leave the organisation…"

The Vision for Sainsbury's Digital Estate:

PCSG worked closely with Sainsburys to define the following vision:

"An easy to use, secure 'Digital Estate' that enables questions to be answered, information to be found and insight gained:

Quickly   Accurately   Completely

To bring organisational agility, efficiency savings and reduction of risk supporting BAU activities, reporting, opportunities and innovation."
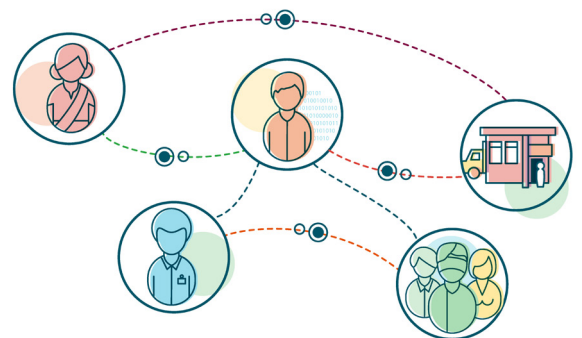
Projects and Outcomes

Desired Outcomes:

- *To enable Sainsburys to answer questions about their estate – how much, where is, which stores, who is and so on*
- *To seamlessly share data across the business, removing information duplication, creating a single version of the truth*
- *To enable fast access to reliable and complete information to efficiently develop, maintain and operate the estate*
- *To provide valuable cross-system reporting to support business innovations, investment decisions and Business as Usual (BAU) functions*

2013 – Sainsburys created and implemented 3D modelling standards

2015 - Initial consultation with PCSG

2016

Common Data Environment (CDE) – Implementation of Business Collaborator (BC) the system chosen as the new asset information CDE.

BIM SME – Provided advice on best practice and standards for the CDE implementation, asset data analysis, linking of systems and change communications.

Initial Stakeholder engagement - Detailed discovery sessions with different teams across the Property Division to identify role specific needs, understand current data issues, current systems used and opportunities for improvements.

Best Practice, Standards & Governance – Introduction of file naming and numbering standards, processes and workflows in keeping with BS1192.

Systems Decommissioning and Migration – Decommissioning Buzzsaw and migration of information to the CDE.

Estates and Projects Database (Salesforce platform) – Streamlining and improvement of core functions – (reporting, data structures, access model, links to other systems) to better meet Sainsbury's needs.

CDE & Systems Administration – User set up and support for the new CDE and existing project information document systems.

2017

Further Stakeholder Engagement – Further detailed discovery sessions with teams across the Property Division.

Systems Discoveries – Investigation of historic and current information held in various systems.

Departmental Questionnaire – Comprehensive survey issued to all Property department staff and third parties to assess and quantify current information management challenges (ease of access/accuracy/completeness). This will be repeated annually and informs the benefits realisation KPIs and metrics.

Programme definition – Definition of the programme vision, aims and implementation strategies for achieving these aims.

Candidate Projects – Development of recommended project briefs to achieve programme aims based on feedback received during the stakeholder discovery sessions.

Business Change Support – Transition support for the integration of Argos and Sainsburys Estate Management teams and the introduction of a new external estates management company. Included changes to IT, Data, HR and Financial systems.

Further CDE Refinements – Improvements to functionality, access model, links to other systems, data hierarchy and user training.

Steering Group management, communications and training – Engagement with steering group, communications at different levels across the department, development and delivery of training.

Health & Safety File – CDE improvements to allow better Health and Safety file management at an asset level.

Project Development – Creation of detailed project requirements catalogues and benefits realisation analysis for CDE, systems and photography projects following detailed user consultation.

2018

Business Need	People	Process	Technology

Case Studies

Digital Estate

Programme Strategy & Implementation

PCSG worked closely with Sainsburys to define their Digital Estate Strategy. This was developed after analysing business needs, issues and priorities and following detailed engagement with multiple stakeholder groups. The Digital Estate strategy is wide ranging including systems, processes, communications, improvements, training and behavioural change. As part of this strategy PCSG helped define a clear vision, programme aims, benefits metrics, implementation strategy and component projects.

Standards, Processes and Governance

Knowledge Transfer, Subject Matter Expertise and Alignment with BS 1192

PCSG provided subject matter expertise to develop essential standards and processes to implement the Digital Estate aims. These are aligned to BS 1192 and other UK and International standards, using best in class systems and tailored to suit Sainsburys business requirements:
- File naming and numbering standards;
- Location, asset, room and area data hierarchies and naming conventions;
- Approval workflows
- Audits and governance to maintain information quality

Implementing Cultural Change

Stakeholder Engagement / Communications / Training

Digital Estate is an important cultural change for Sainsbury's beyond IT systems. It brings the importance of information management to centre stage. Engagement with different teams and stakeholders in the Property department has been essential to all Digital Estate projects. Projects briefs and requirements are developed from priorities and issues raised by staff. Similarly KPI metrics are based on staff survey feedback. Communications and training plans engage staff at all levels. Programme aims and priorities are agreed through regular steering group meetings.

Systems

Implementing, streamlining, linking and improving systems

Systems form the backbone of Digital Estate. PCSG has been instrumental in implementing a new Common Data Environment (CDE) using Business Collaborator. The system also allows reporting and interrogation of asset CAD elements. PCSG advised on best practice and standards framing the implementation, asset data architecture, integration of systems and change communications. PCSG then continued to help Sainsbury with other systems projects – implementing further CDE functionality enhancements, increasing the CDE's scope, improving the Sainsbury's Salesforce asset information database, merging Argos and Sainsburys information, providing user support services and data cleanse improvements.

Project Developme

Implementing business and systems changes

PCSG has undertaken several project development and management roles as part of the Digital Estate programme. Project briefs and requirements catalogues are carefully developed following thorough user consultation. They must realise benefits and achieve the programme aims of making information easier to access, more accurate and complete. Wide ranging recommended projects include information standards, CDE systems improvements to feedback and maintain information quality, systems links, reporting, user innovations, mobile applications and training/communications. PCSG project managers have led projects implementing new systems, process changes and business changes.

Resources

A range of People, Processes and Technology specialists

PCSG's involvement with Sainsburys includes a range of skills and services to meet the varying requirements of the Digital Estate programme:
- BIM Subject Matter Expertise
- Systems and data specialists
- Project & programme managers
- Business change specialists
- Communications specialists
- User support and administration

The team's strength lay in tailoring their services to meet Sainsburys unique business needs, the specific requirements of the Digital Estate project and the wider programme aims.

Business Need:
• Business Aims •Project Briefs • Benefits Realisation • Operational • Efficiencies • Cost and Time Savings

People:
• User Discovery workshops • Stakeholder requirements mapping • User testing • Training • Communications • Support

Processes:
• Workflows • Standards, Methods & Procedures • Governance • Security Model • User Roles

Technology:
• Systems design • Project implementation • Data structures • Mapping • Migration & Decommissioning • Systems linkages • User interface • Testing