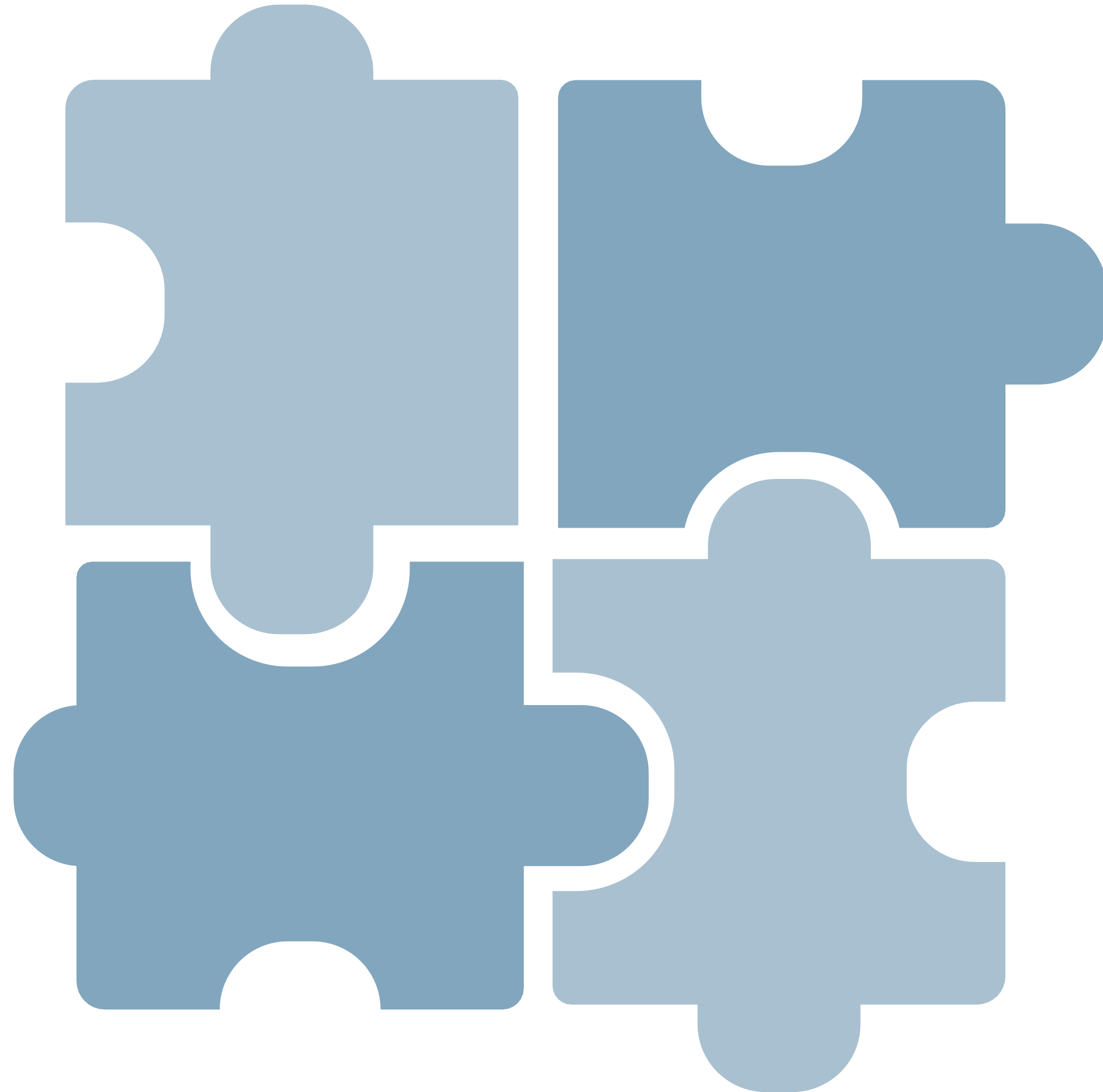




Landmark
& a s s o c i a t e s

Mobilisation Masterplan

*Your Step-by-Step Guide to a
successful FM Transition from
contract award to operational
excellence*



Mobilisation

Mobilisation is the critical bridge between contract award and steady-state operations.

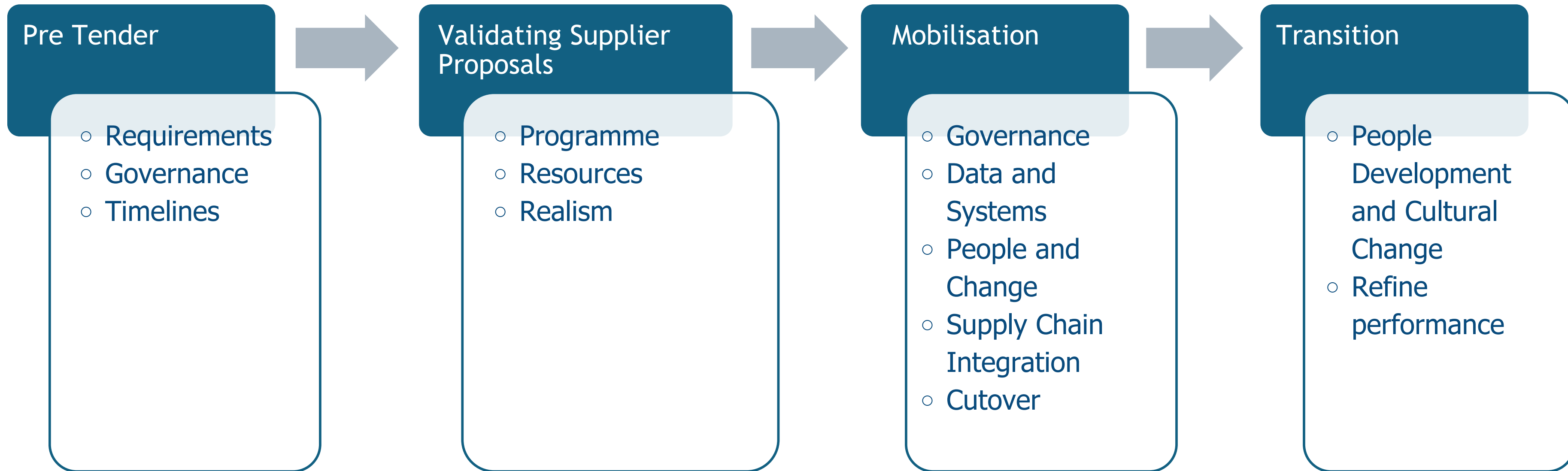
It's the phase that can make or break the success of an FM contract, setting the tone for performance, client confidence, and long-term delivery.

At **Landmark & Associates**, we've supported mobilisations across over 900 properties, including major government portfolios, manufacturing sites, and financial institutions, including contracts worth over £3 billion.

We've also been called in to remediate failing contracts, and often, the root cause lies in poor mobilisation: unrealistic timelines, incomplete data, or communication breakdowns.

This guide draws on that experience to help FM teams, clients, and suppliers avoid the most common pitfalls and adopt best practices across the pre-mobilisation, mobilisation, and post-go-live phases.

Key Stages to Consider



Pre-Mobilisation: Setting the Foundations

Getting mobilisation right starts before the supplier is even appointed. Early preparation allows time to develop a clear strategy, clarify responsibilities, and address risks.

Clients should require tenderers to submit mobilisation method statements and resource plans, which need to be properly validated during evaluation.

Things to agree:

- Scope of services and expected outcomes
- Key milestones and deliverables
- Roles, responsibilities, and decision rights
- Measures of success and reporting expectations
- Minimum viable service at go-live, then full service after Transition

Define Requirements and Outcomes

Effective mobilisation begins with a clear understanding of how the mobilisation service is expected to work.

Mobilisation success depends on precise, pre-agreed requirements and a supplier able to provide proposals to support these.

Pre Tender



Validating Supplier Proposals



Mobilisation



Transition

Setting the Timeline

Competitive tendering often drives unrealistic mobilisation periods. But cutting time doesn't cut costs, it increases risk.

Clients should schedule sufficient time for due diligence, validation, system configuration, and team induction.

Beyond mobilisation, the client needs to allocate a post-transfer transition period to finalise any activities that cannot realistically be completed during the mobilisation phase.

- 3 months minimum for Standard contracts
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- 6+ months for Complex/multi-site operations
-
- Transition 2 - 6 months

Pre Tender



Validating Supplier Proposals



Mobilisation



Transition

Check Tenders are Realistic

Clients need to ensure delivery plans reflect achievable programmes, sufficient resources, and measurable KPIs. Too often, mobilisation teams inherit promises made during bidding that don't align with operational realities.

In their tender, suppliers must set out who will be on their mobilisation team and when they will start.

Clients will need to check that the supplier's approach is practical and that staff can either be recruited or are available in a timely manner.

Note of warning:

Most clients require some level of mobilisation transformation. Often, incumbents underestimate or exclude these costs, particularly if they assume the service is already running smoothly.

Important checks

- Check programmes can be supported by the Client (e.g., sign off / user testing)
- Check programmes can be supported by the existing supplier (e.g., data flows)
- Check proposed supplier programmes are deliverable
- Check the supplier has an experienced mobilisation team that is ready to start
- Ensure delivery teams understand the commitments made during business development - either through tender-stage presentations or mobilisation kick-off

Pre Tender



Validating Supplier Proposals



Mobilisation



Transition

Communication and Governance

A strong communication structure ensures that expectations remain aligned and that early issues are addressed before they become systemic.

Communication is the backbone of every successful mobilisation.

Establish Governance, including:

- Clear lines of communication and escalation
- Regular governance meetings and track progress against milestones
- Supplier to provide concise reporting; what's on track, what's delayed, and why
- Develop joint tracker or digital collaboration tools to maintain visibility and accountability
- Communicate openly; surprises erode trust, transparency builds

Pre Tender



Validating Supplier Proposals



Mobilisation



Transition

Data Integrity and Systems Setup

Accurate data is the bedrock of FM performance.

Incomplete or inaccurate asset data leads to inefficiencies and reactive maintenance.

Robust data management from day one ensures operational readiness and credible reporting from the start.

Client and supplier should ensure there is a data quality sign-off milestone to confirm data integrity before service commencement.

Suppliers need to demonstrate completion of the following:

- Transfer and test data from incumbent systems
- Full asset verification; don't rely solely on inherited registers
- Test CAFM/IWMS systems thoroughly before go-live
- Ensure all system integrations with subcontractors and partners work seamlessly
- Complete User Acceptance Testing (UAT) of CAFM/IWMS before go-live
- Validate system integrations and reporting outputs

Pre Tender



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Mobilisation



Transition

People and Change Management

Mobilisation isn't just about processes, it's about people.

Suppliers focusing solely on TUPE transfers without preparing staff to deliver the new service risk low morale, poor productivity, and service disruption.

- Engage early with transferring staff; communicate the “why” as well as the “what.”
- Provide clear job descriptions and reporting lines.
- Offer training, onboarding, and technical support before day one
- Build a sense of ownership and inclusion; teams who feel valued deliver faster, better results.

Training and engagement are essential to service continuity rather than optional.

- Avoid uncertainty over which staff will transfer to the new supplier
- The incumbent will need to keep delivering the service and will not be able to spare staff for training by the new supplier

Completing transfers first (during mobilisation)

Enabling staff through targeted onboarding and role-based training (during transition)

Pre Tender



Validating Supplier Proposals



Mobilisation



Transition

Supply Chain Integration

New suppliers typically introduce different systems, tools, and operating models, which demand adaptation on both sides.

Suppliers and subcontractors are an extension of their delivery capability.

A fully mobilised supply chain prevents service gaps and gives clients confidence in operational readiness.

As part of the mobilisation, the client and supplier must conduct a Supply Chain Readiness Review before mobilisation completion, including:

- Finalise contracts, insurance checks, and compliance documentation early
- Onboard suppliers into systems before the start date
- Test the end-to-end process, from work order to completion, before go-live

Pre Tender



Validating Supplier Proposals



Mobilisation



Transition

Operational Planning, Readiness, and Cutover

A robust Service Delivery Plan should reflect how operations will **actually** work, not just what was promised during bidding.

There needs to be a clear plan to cutover from the incumbent supplier to the new.

Ideally, the Client will need to be part of this process as they have contractual relationships with both parties. The cutover will predominantly focus on the data and services that will migrate across in the last weeks of the current contract through the first week of go-live.

Cutover issues to be addressed will include:

- **Service continuity:**
Identify all critical services (e.g., M&E, cleaning, security, catering) and when the service will stop being delivered by the incumbent and will start with the new supplier.
- **Stock and consumables:**
Ensure sufficient supplies are available on day one (e.g., cleaning materials, PPE).
- **Access control and passes:**
Manage physical and system access changes to avoid security breaches.

Pre Tender



Validating Supplier Proposals



Mobilisation



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Post Go-Live: *Transition*

Mobilisation doesn't stop at go-live.

No FM contract can ever be fully mobilised before go-live because key elements rely on real-time data, people, and site access that only exist once the contract starts.

The first three months following Go-Live are fundamental to stabilising operations and embedding new ways of working. Teams need proper training, shadowing, and system access before taking full responsibility.

Processes must be tested and refined in real conditions.

Asset data, maintenance histories, occupancy patterns, and service logs all need validating, correcting, and structuring once the supplier is live and has site control.

Post Go-Live prioritises should include:

- Reviewing post-live performance
- Staff development and refreshing training
- Checking data quality and reporting accuracy
- Gathering client feedback
- Keeping communication clear and proactive

Pre Tender



Validating Supplier Proposals



Mobilisation



Transition

FM Mobilisation Checklist

Whether you're a client mobilising a new FM provider or a supplier preparing to take on a new portfolio, this checklist ensures you start as you mean to go on: **with control, clarity, and confidence.**

- Scope of mobilisation services included in tender documents
- Realistic mobilisation timeline approved
- Scope and deliverables verified against tender commitments
- Governance and communication framework agreed
- Full asset verification completed and logged
- CAFM/IWMS systems configured, tested, and integrated
- TUPE/HR processes finalised and staff onboarded
- Supply chain contracts completed and compliance verified
- Operational readiness and cutover complete and minimum viable service implemented
- Post-Go-Live Transition – planned and completed.

Final Thoughts

Successful mobilisation is not an accident; it's the product of planning, coordination, and clear communication.


It is always more successful if Client and Supplier are working together. This checklist ensures you start as you mean to go on: with control, clarity, and confidence.

At Landmark & Associates, we combine technical, commercial, and operational expertise to help organisations source and mobilise high-performing FM Contracts.

Need Expert Support?

If you're about to define your FM strategy, source FM services, mobilise a complex FM contract or need to rescue one already underway, our team can help.

From mobilisation strategy and performance governance to data validation and post-go-live reviews, **we provide independent, RICS-accredited expertise to ensure your mobilisation is structured, compliant, and stress-free.**

 **Get in touch with us to discuss how we can help you deliver a mobilisation that inspires confidence from day one.**