

A nighttime photograph of a cityscape featuring a river, a bridge, and several illuminated buildings. The scene is reflected in the water, and the sky is a deep blue.

Maximizing Asset Value: Unifying Real Estate and Facilities with IBM Maximo

Northeast Maximo User Group

Nov 4th, 2025

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Lead Technical Product Manager
Maximo Real Estate and Facilities



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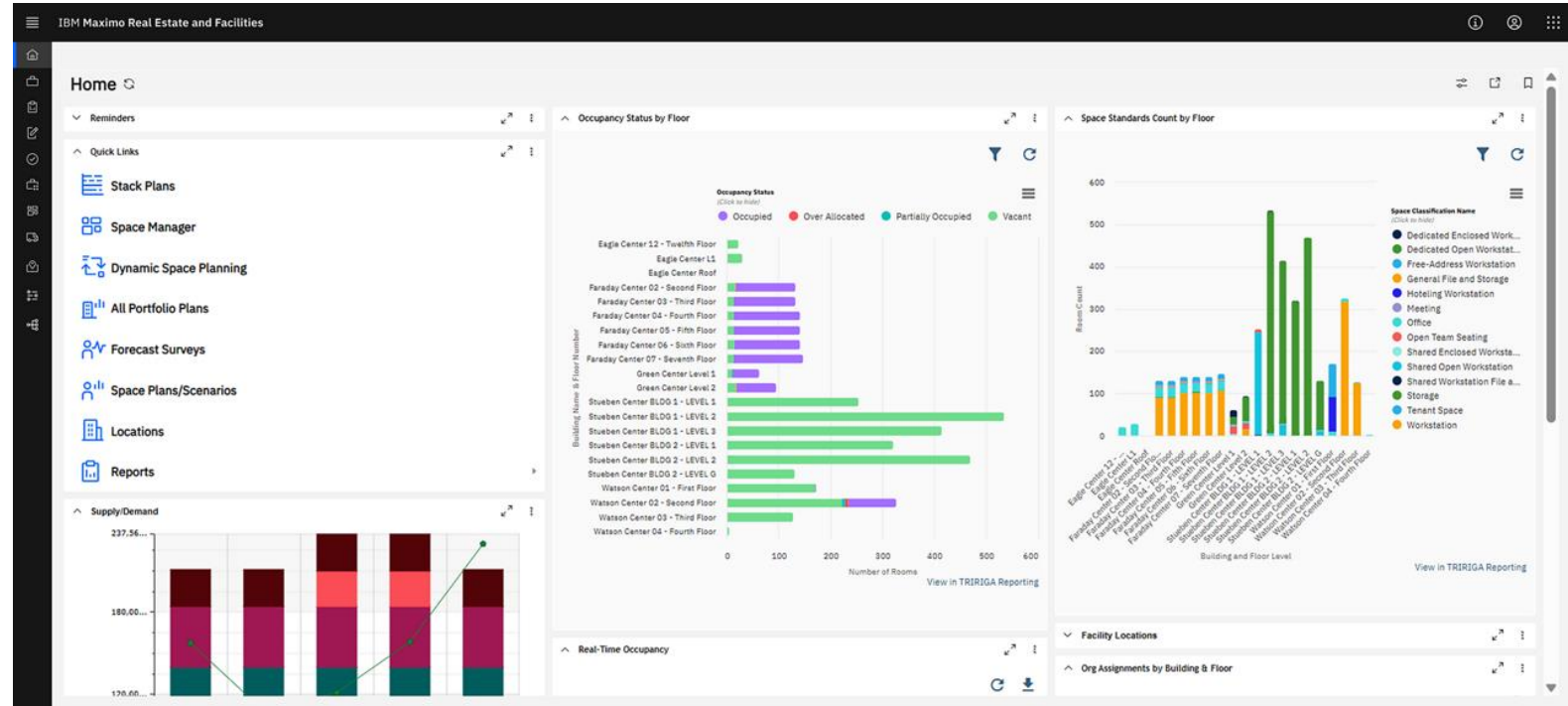
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What you will hear about today....

- What is Maximo Real Estate and Facilities?
- The evolution of Maximo Application Suite
- Maximo Real Estate and Facilities Capabilities
- Recent Releases and Roadmap
- Integrations



Advance asset management with IBM asset lifecycle management solutions

 Extend the lifespan of **assets**.

 Reduce maintenance and **operations costs**.

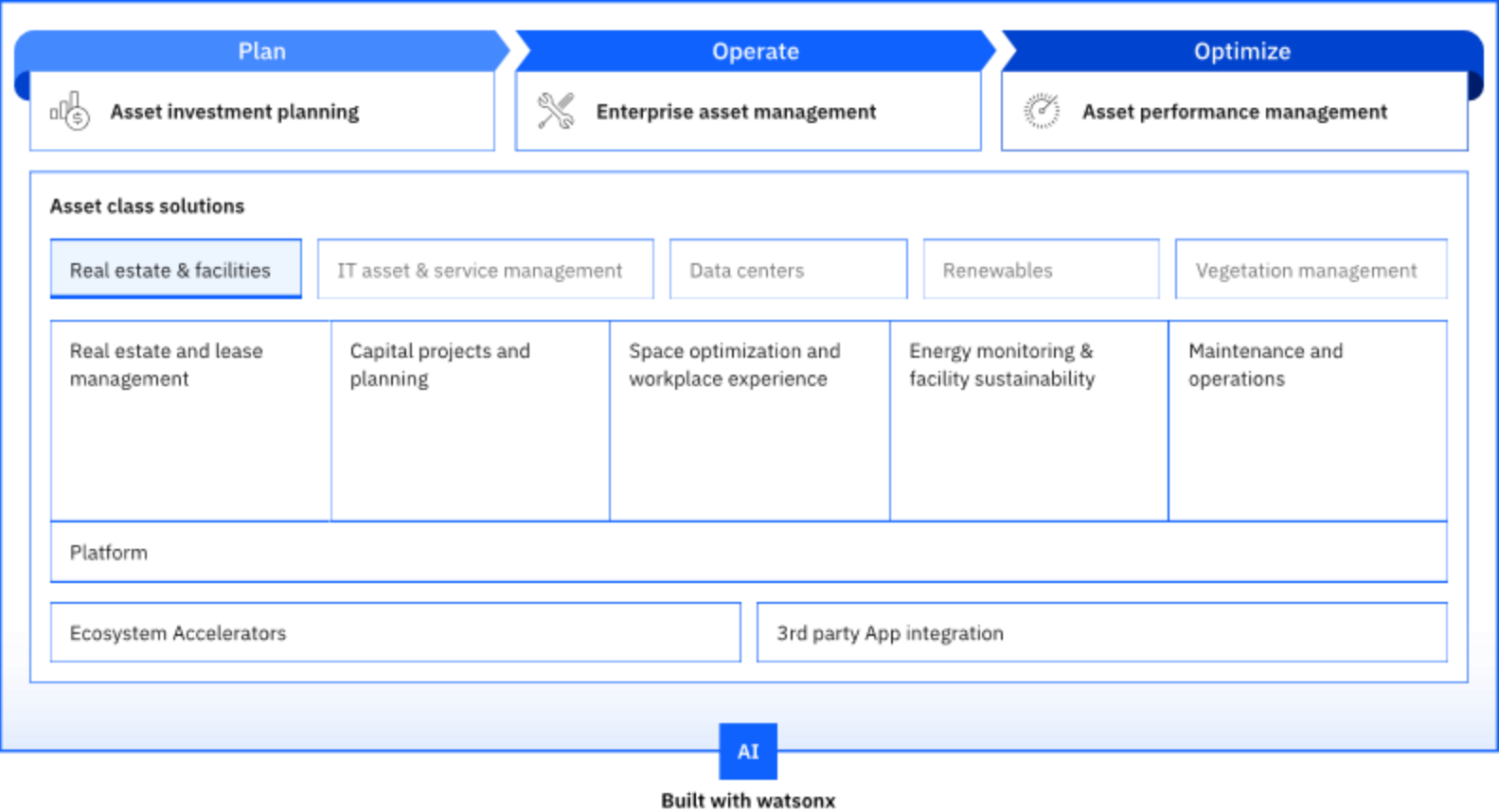
 Manage **risk** associate with availability and sustainability

 Optimize **real estate portfolios** throughout their lifecycle



Maximo Real Estate & Facilities

- Real Estate & Facilities is unified onto common components within Maximo Application suite
- Users and licenses are centrally managed across the suite



Enterprises operate facilities for their workforce and customers across a complex lifecycle

Should this building/asset be leased or owned?

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

Do we have to build or make major renovations?

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

How do we keep up with maintenance needs?

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

How should sustainability efforts be advanced?

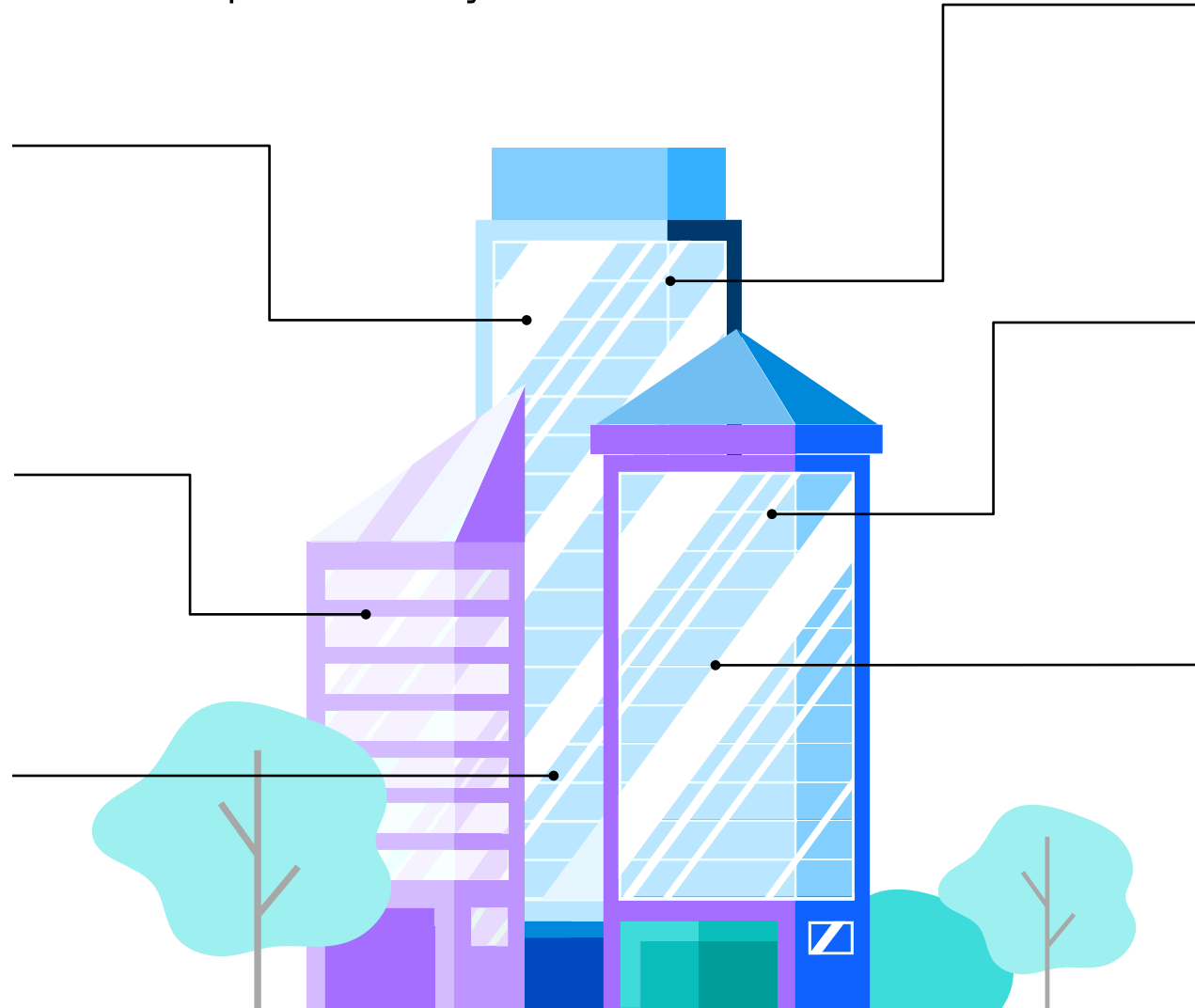
- Utility consumption
- Environmental audits
- Track emissions
- ESG reporting

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

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

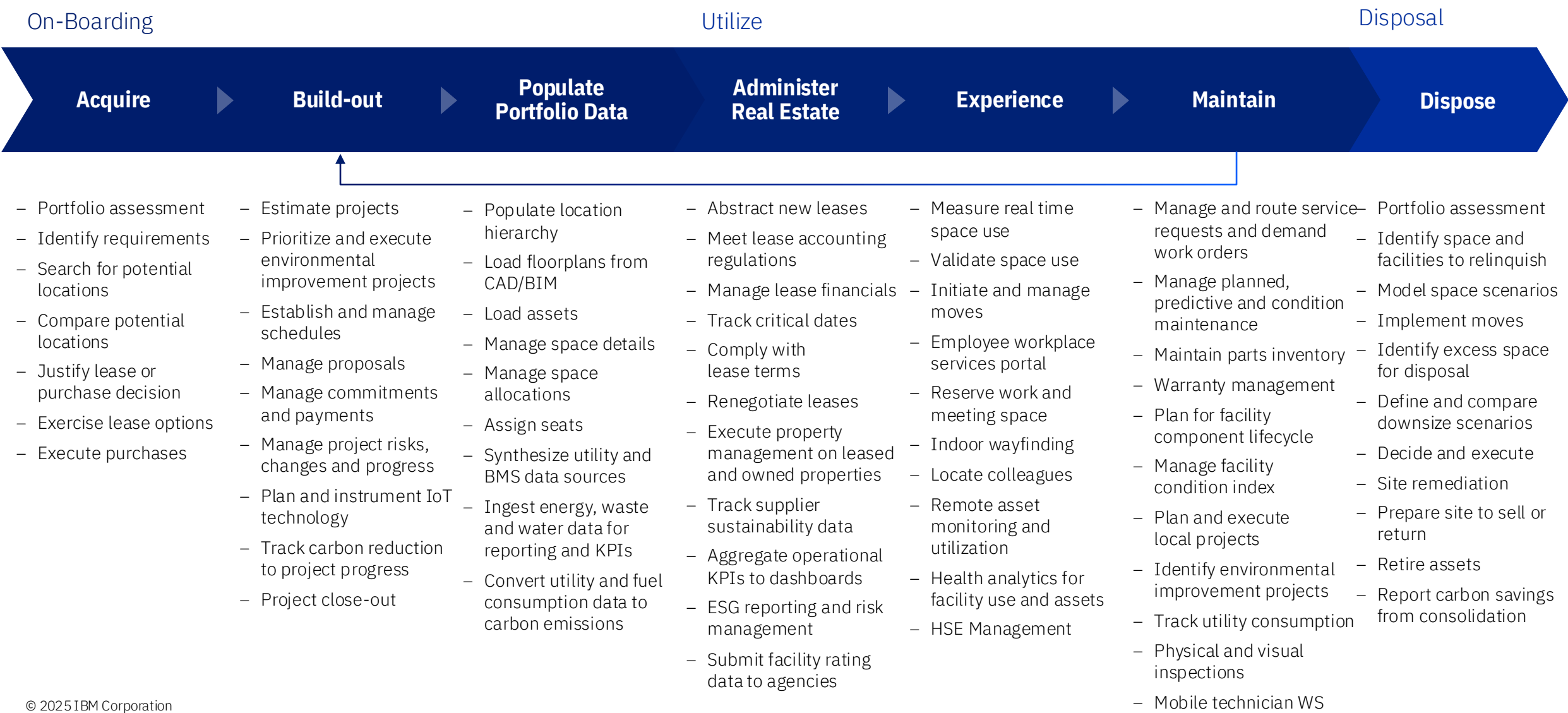
Can we make the occupant's experience awesome?

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



...the management of this lifecycle is executed through
Integrated Workplace Management Systems (IWMS)

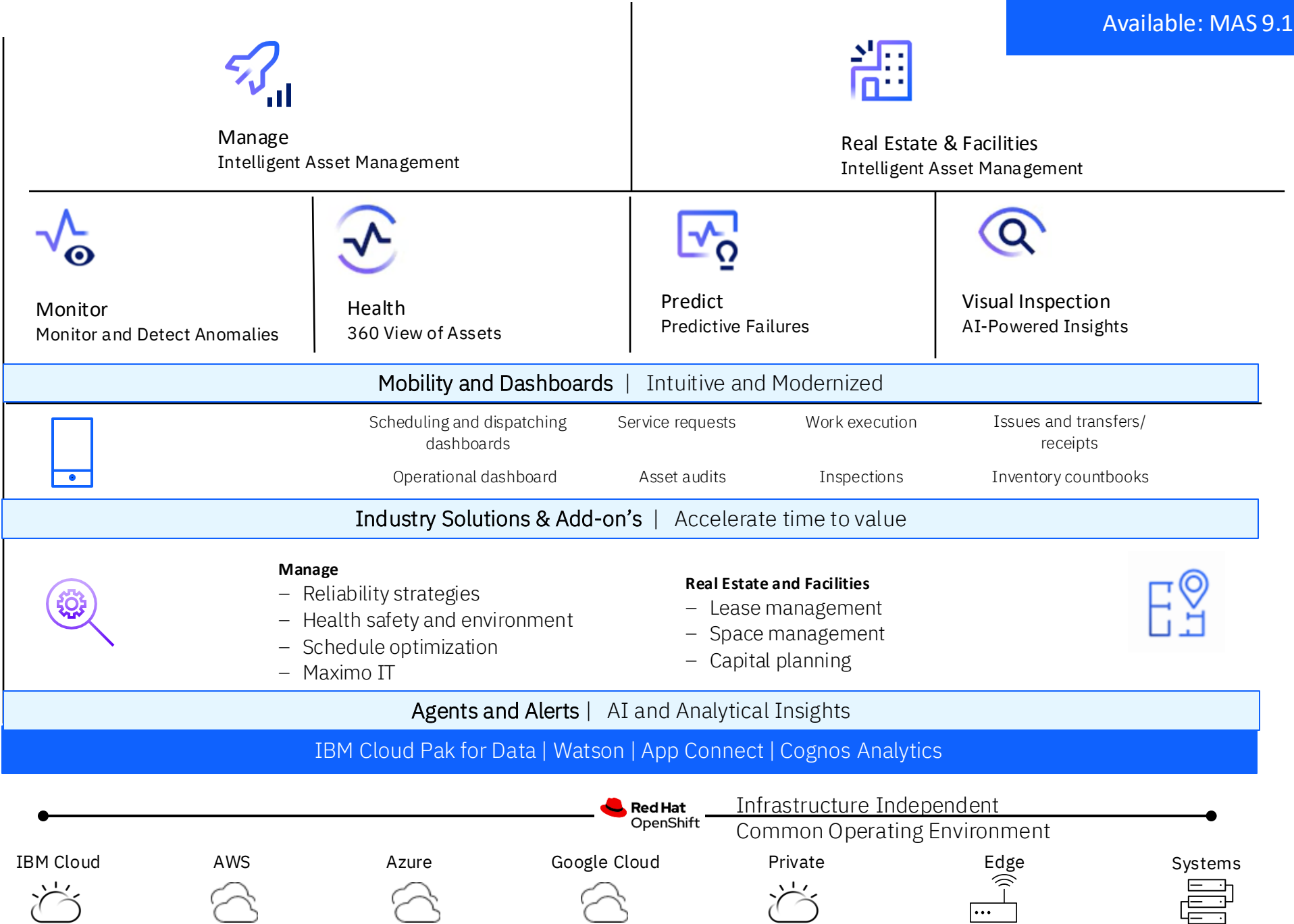
Real estate and facilities lifecycle should be managed as an integrated system



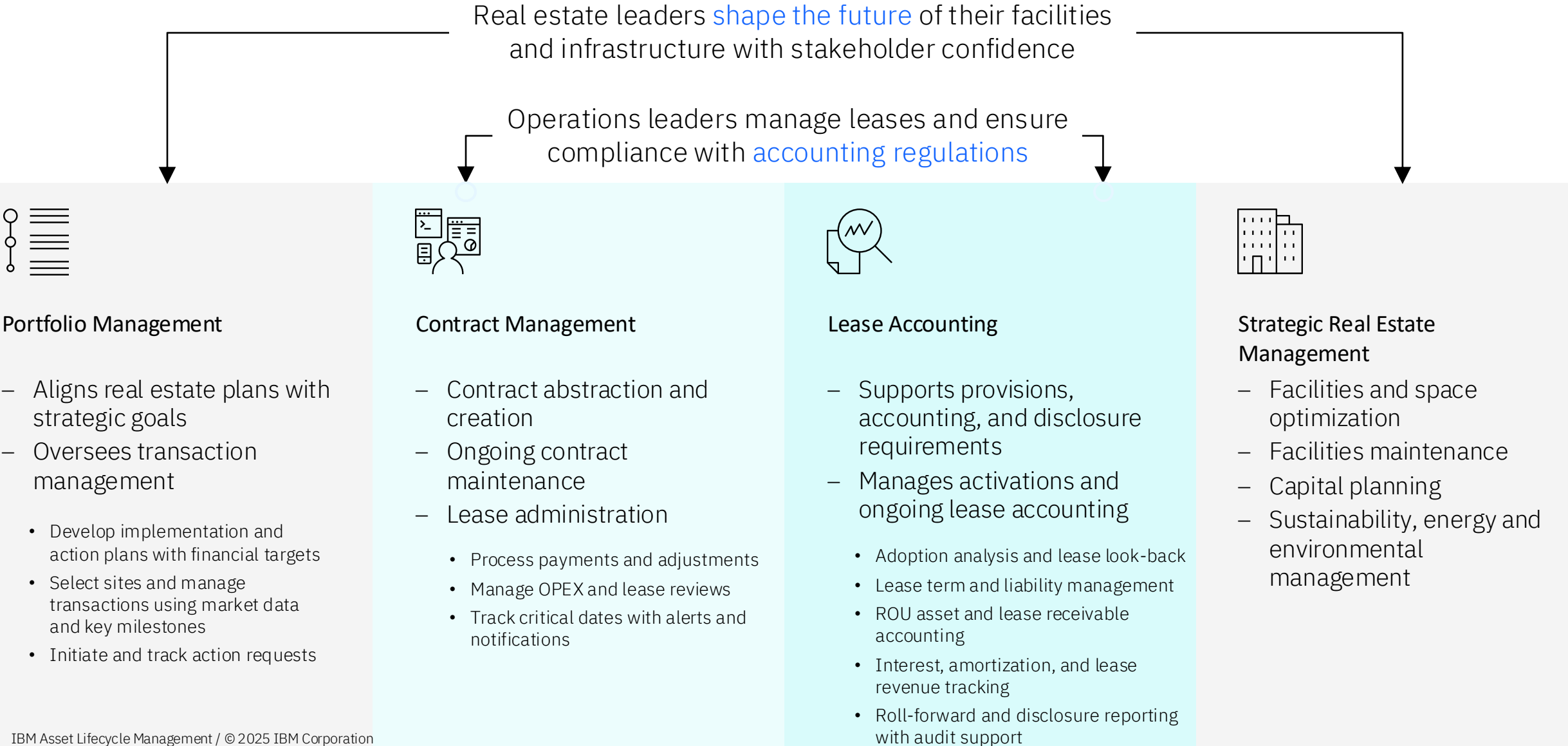
Maximo Application Suite

Provides a complete asset view, addressing key organizational roles

- Technicians
- Technician Supervisor
- Asset Maintenance Manager
- Plant Manager
- Fleet Manager
- Operations Manager
- Reliability Engineer
- Quality Manager
- Planners / Schedulers
- Dispatchers
- Storeroom Managers
- Purchasing Managers
- Facility Managers
- Program manager
- Project manager
- Space planner
- Reservation coordinator
- Real estate strategist
- Lease administrator
- Lease accountant



Maximo offers a complete solution for real estate portfolio performance and lease management



Admin Functionality

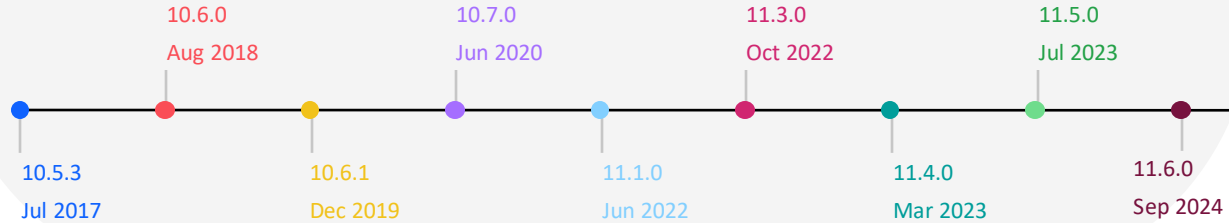


- **Index Adjustment Calculator**
- **Partial Month Payments**
PLIs calculated correctly for payment start dates when not the 1st of the month
- **Bulk Processing of Lease Index Adjustments**
- **Schedules for Tenant Incentives**
ability to make updates & recalculate
- **Non-Standard Calendars**
provides the ability to report using various date structures
- **Redesign of RE Invoice Creation Form for AR and AP Leases**
- **Payment Adjustments Tracking**
- **Bulk Uploading of Lease Documents**

Processing Efficiencies

- **Journal Entry (JE) Configuration Framework**
- **Period-end Closing Capabilities**
- **Segregation of Duties**
- **Journal Entry Support**
updated set of JE templates
- **JE Segments and Processing**
elimination of repeating segments and improved processing performance
- **Catch Up Journal Entries**
for Payment in Arrears retrospective modification

Lease Management Enhancements v10.5.3 – 11.6



Disclosure Reporting



- **Quantitative Disclosure Reporting Templates**
- **Disclosure Reports**
updates and enhancements to IBM Disclosure Report Assumptions and Design.pdf
- **Additional Columns in Accounting Schedules**
Separate Short-Term versus Long-Term Lease Liability Balances & Gross Asset Value/Accumulated Amortization/Net Asset Value
- **Journal Entries by Asset Class**
support requirements for reporting by "Class of Underlying Asset"
- **Historical Reporting**
- **FX Handling**
functional currency and reporting currency remeasurement, translation and reporting
- **Net Lease Liability Roll Forward Report**
for leases with prepaid rent

Accounting Functionality



- **Interest Calculation Method**
(simple v compound) added to App Settings
- **Index Adjustments**
multiple payment schedules & index clause types – variable become fixed
- **Dismantle Cost**
new field with the associated cost added to the final FLI
- **Lease Reclassification – Operating to Finance**
- **Adoption Process**
separate field for GAAP & IFRS Adoption & Look Back Fiscal Periods
- **Local Reporting**
Enable feature to allow local Lease Accountant to access and adjust local reporting only
- **Termination Functionality**
correct cutoff of accounting schedule/voiding payments/no recalculation
- **Lease Reclassification – Finance to Operating**
- **Separate Classification Tests**
support old and new FASB / IFRS standards with ability to set System Lease Classification thresholds
- **Reversal of Impairment per IFRS**
ability to reverse previously recognized impairments when appropriate under IFRS 16 standard and guidance
- **Roll Forward Reports**
reconciliation of the changes and movements in the Lease Liability and Right of Use Asset Balances
- **Bulk Creation of Lease Summary Balance Record**
enables create of opening LSB records in functional currency via a Data Integrator and Patch Helper
- **Prepaid Solution**
Actual v Contractual Payment Dates
- **Solution for Negative Asset Value Scenarios**

GASB 87

- **Lessee Accounting, Reporting & Disclosure**
- **Lessor Accounting, Reporting & Disclosure**

GASB 96

- **Lessee Accounting, Reporting & Disclosure**

Real Estate and Facilities offers comprehensive Capital Planning and Project execution



The tools and techniques to improve capital planning can be organized in a framework

Portfolio Management



Portfolio Life Cycle Analysis

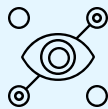
System of Record to capture building portfolio condition. Strategists make real estate portfolio decisions based on cost estimates to address structural deterioration and deficiencies in facility components, classified through industry standards



Asset Management Systems

Tracks the performance and condition of building systems and equipment, as well as scheduling and tracking maintenance activities. This prioritizes investments based on asset condition, optimized maintenance schedules, and avoiding unexpected breakdowns.

Assessment



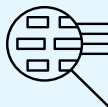
Facility Condition Inspection

Systematic evaluation of a building's systems condition identifies deferred maintenance issues and improvements. Determine Facility Condition Index.



Energy Audits

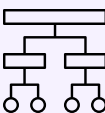
Identifies energy-saving opportunities in equipment and systems to reduce operating costs and improve sustainability.



Risk Management

Track potential risk liabilities and opportunities associated with a facility. Evaluate funding scenarios. Prioritize capital investments for the appropriate risk responses.

Execution



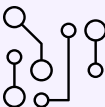
Program and Funding Management

Manage large scale planning program to coordinate business objectives across multiple related projects. Aligns funding sources, ensuring they are applied to proper projects.



Vendor Management

Manage RFIs, bids, and inquiries from vendors. Also, tasks, work orders, progress reports/payments, change orders, inventory updates, and documents throughout project execution



Project Management

Manages scheduling, budgeting, and tracking of capital projects,. Ensure projects are completed on time and to budget, and that resources are allocated efficiently.

Maximo Real Estate and Facilities streamlines how teams work together to improve integrated project execution and consolidated tracking

Personas



Facility Condition Manager



LOB Manager



Program Manager

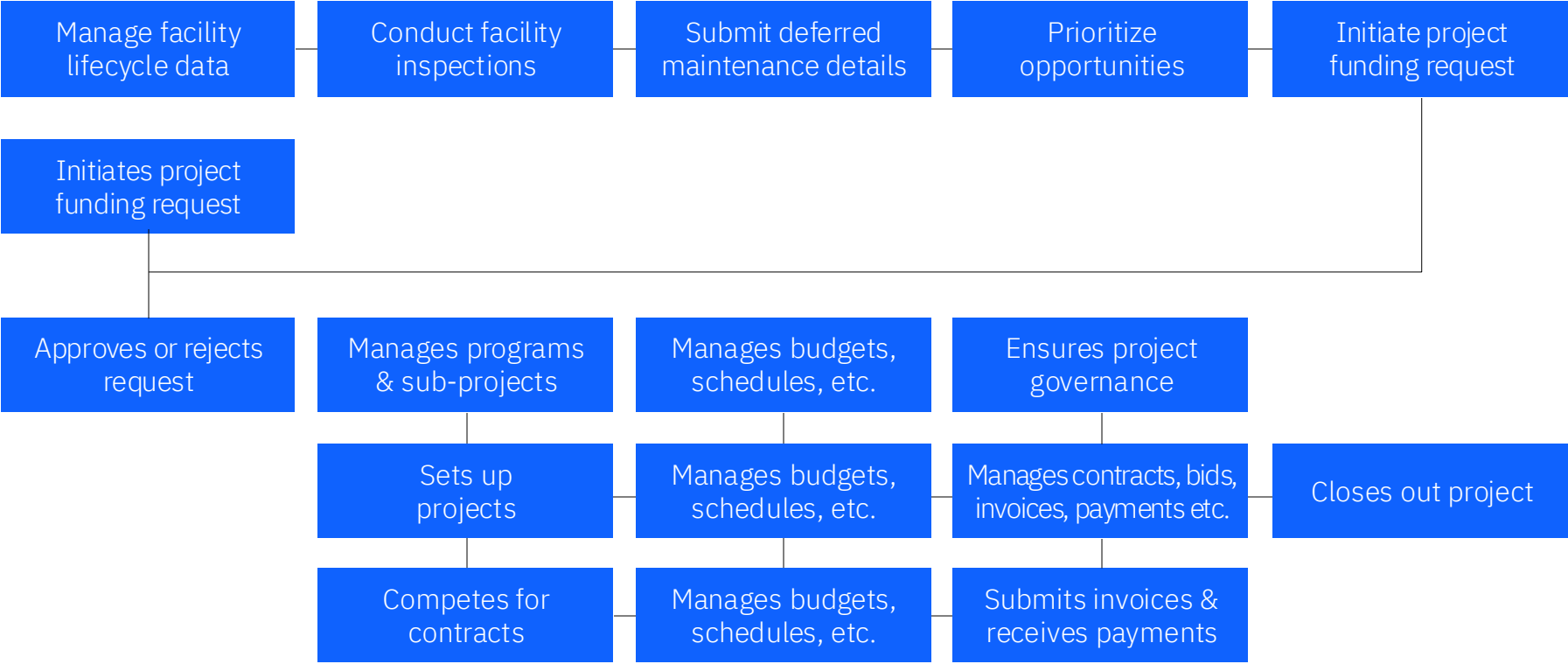


Project Manager



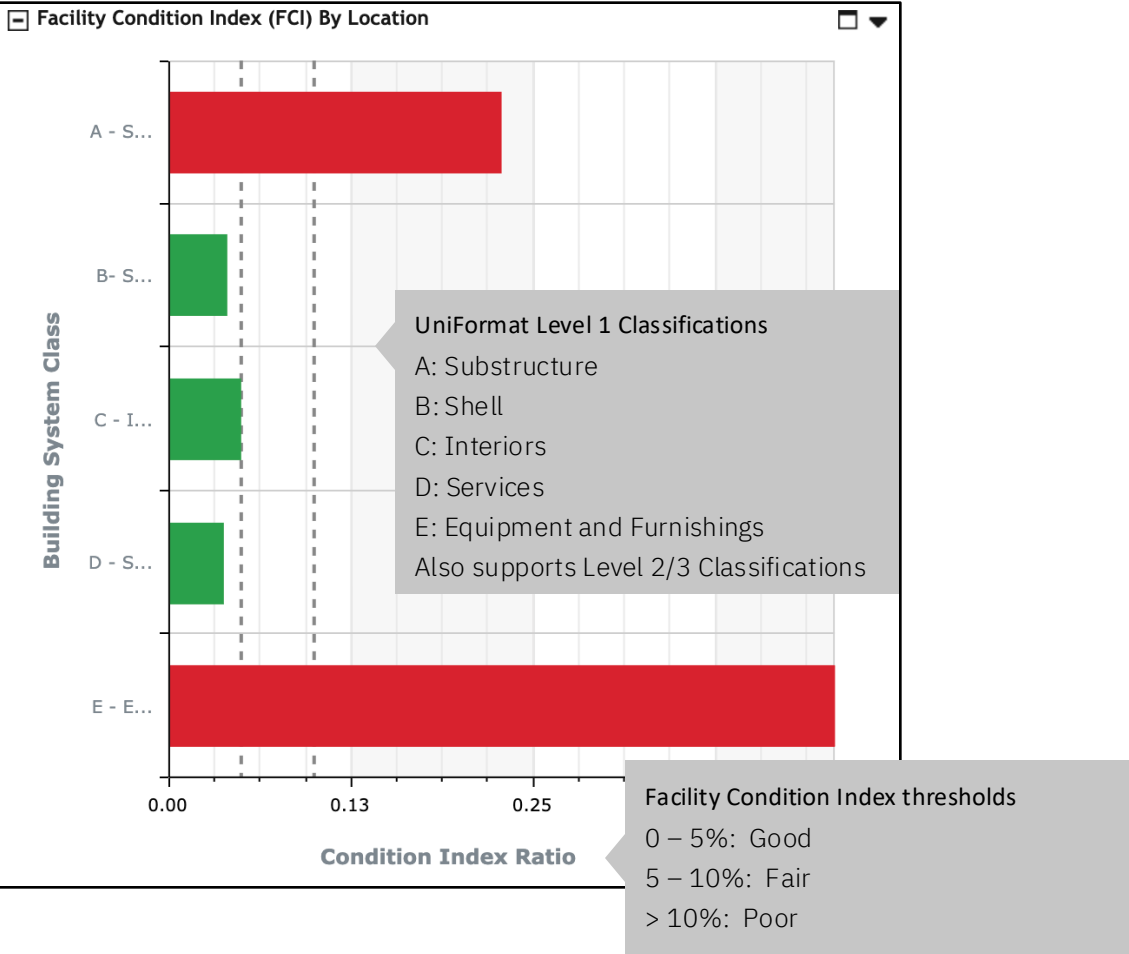
Contractor

Summary of supported activities & responsibilities

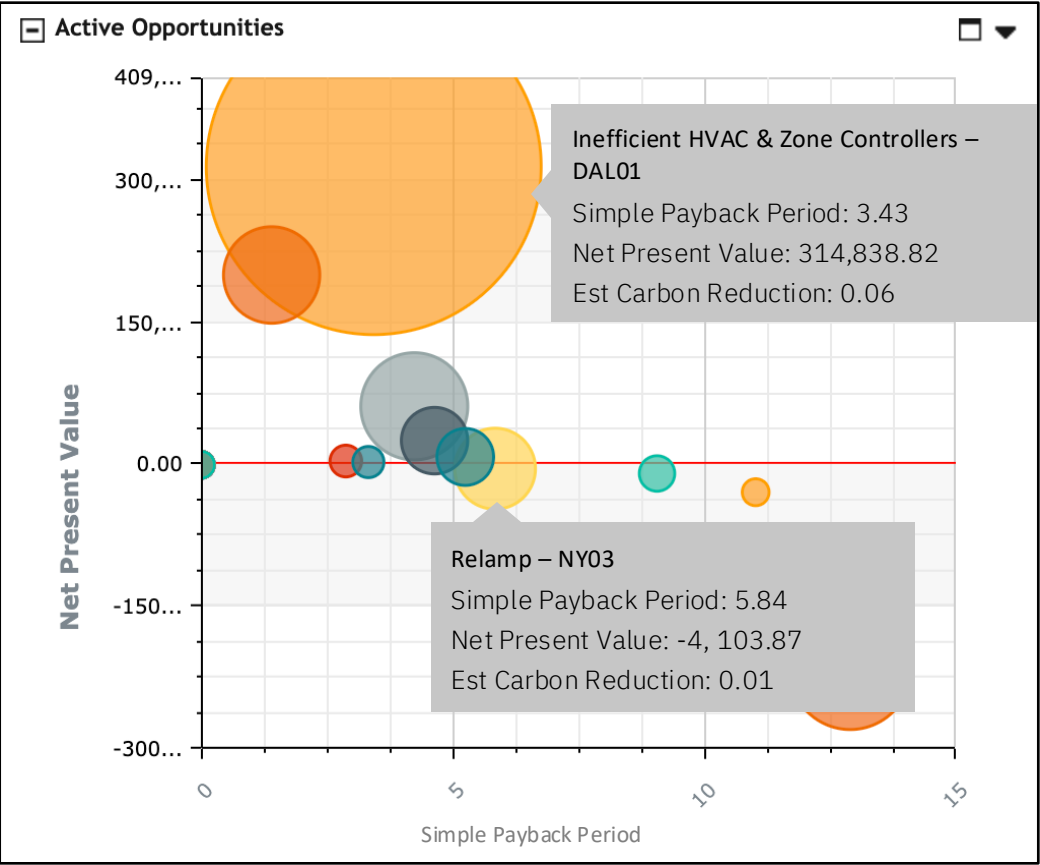


Reporting and analytics prioritize where funding is most urgent and impactful

Summarized portfolio by UniFormat classifications

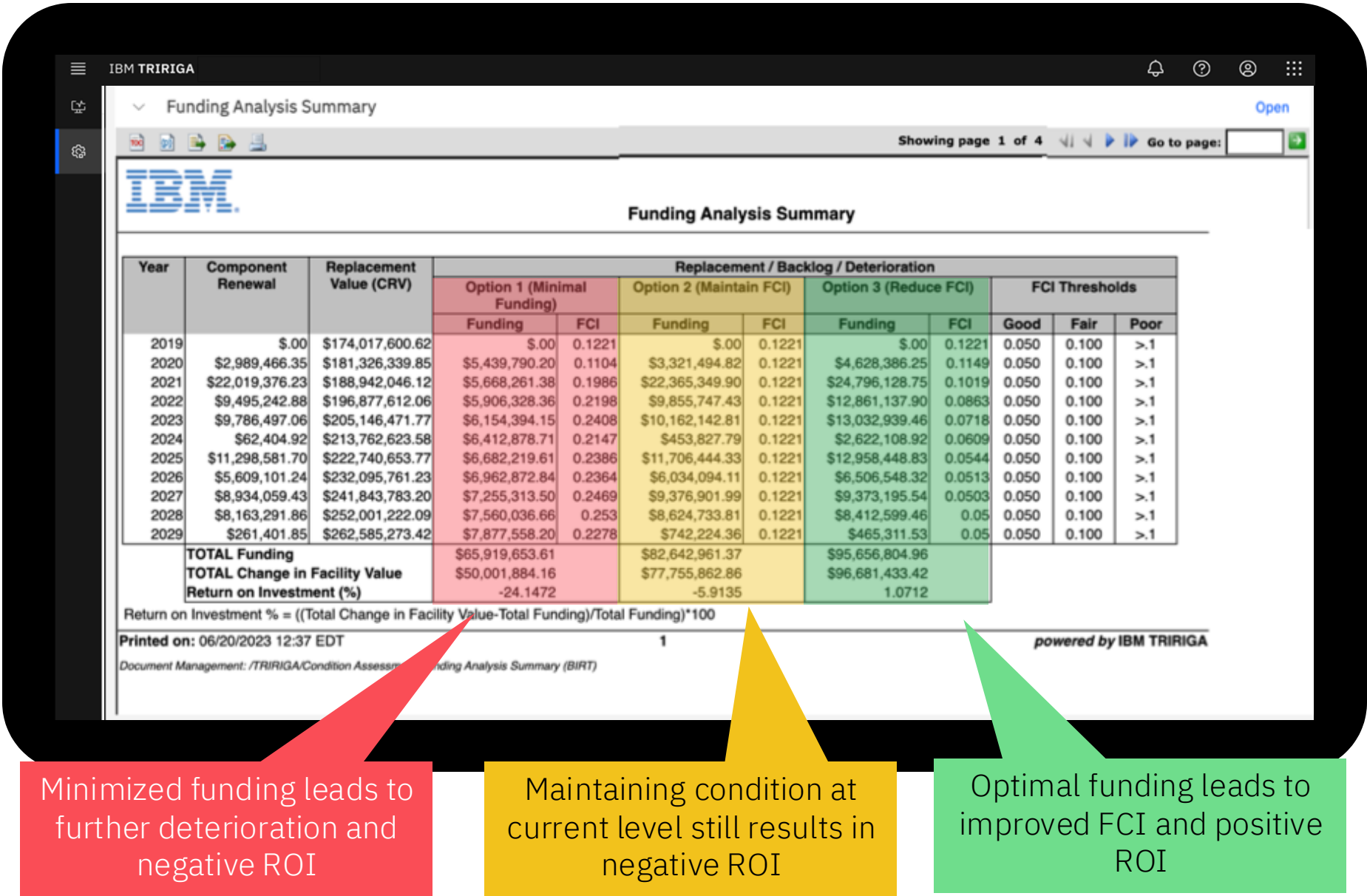


Bubble chart helps strategists prioritize funding



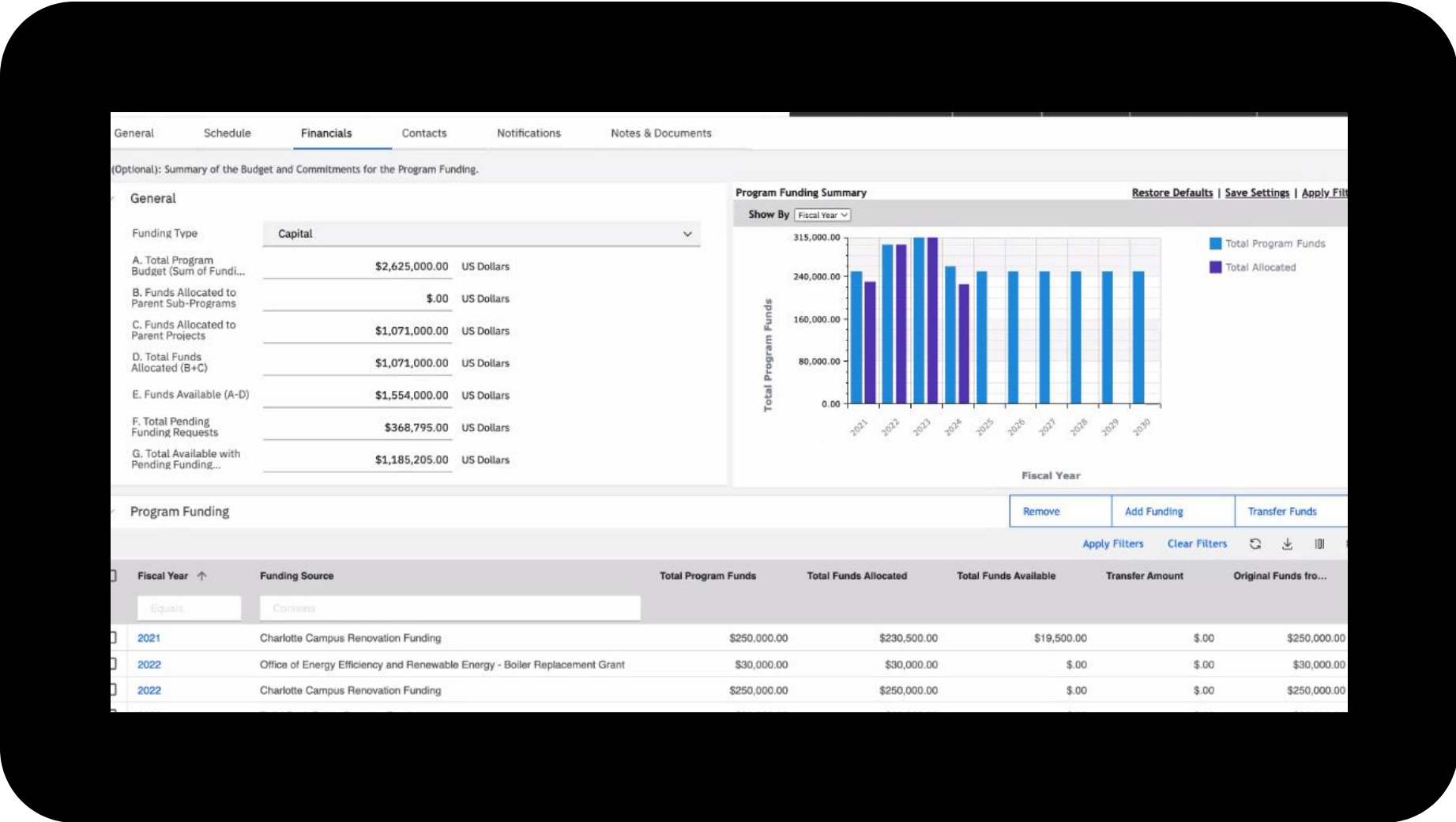
Comparative report for alternative funding scenarios

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



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

Procurement management at the tip of your fingers

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

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 Steel	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 Load-Signage Bid	1000583-PHL08 - 203 N ...	Tenured	\$2,810.00
1000037	Painting Bid	Bid for p			
1000045	Wave City - Planning & De...	Planning			
1000048	Wave City - General Contr...	General			
1000057	1000586-4141 Office Par...				

Recent Project: 1000586-CLT001 - Renovation Project

Select Project

Personalize

Open In New Window

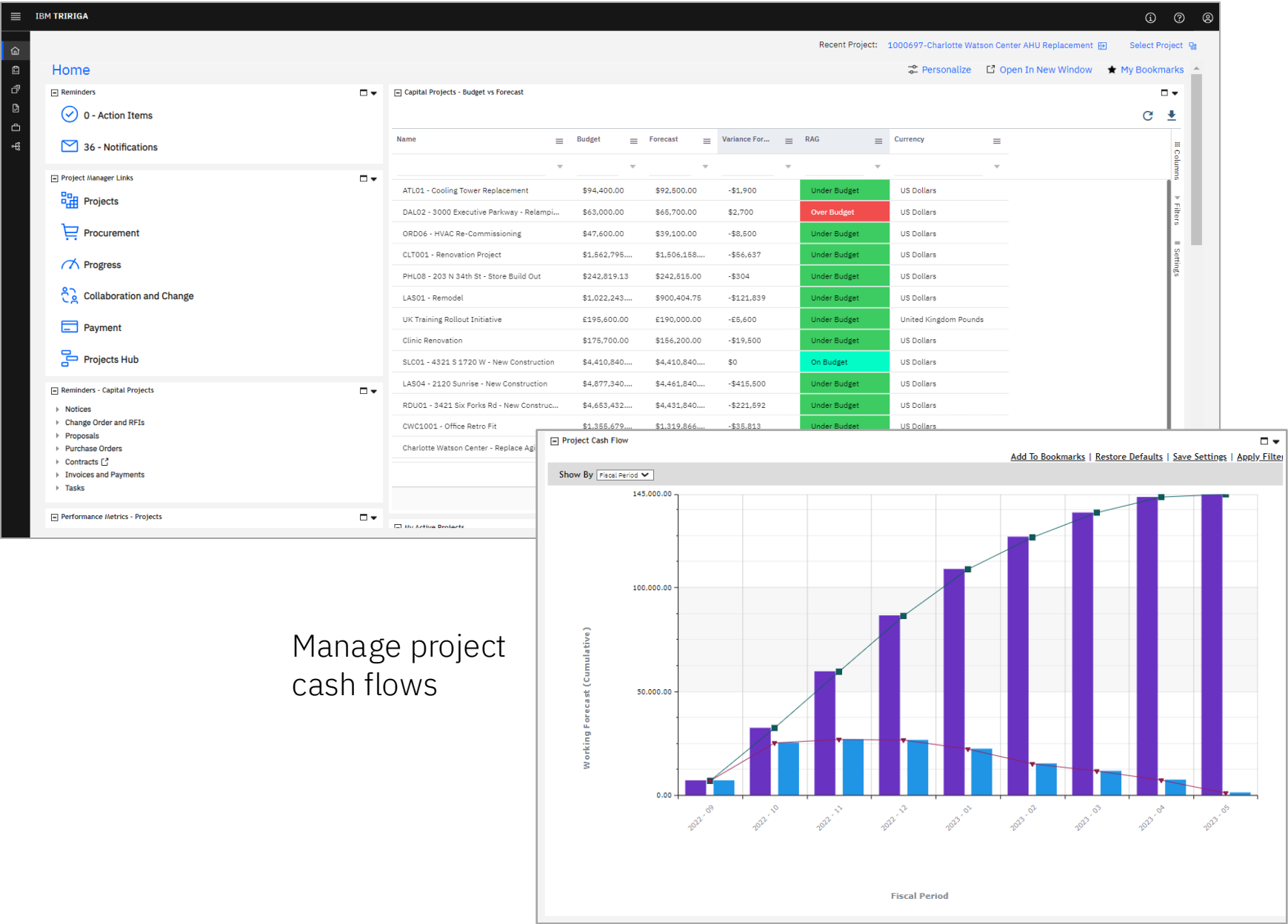
My Bookmarks

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

Enabling space management and the occupant experience

Space Planners need strategic, admin and oversight capabilities to manage and tune how space is to be used efficiently

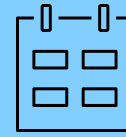


- CAD and BIM integration
- Dynamic space planning
- Space forecasting
- Stacking



- Space allocations and chargebacks
- Move management
- Space audits
- Occupancy monitoring
- Space utilization
- Floor / building level utilization

Space Users expect to access facilities and space seamlessly, adding productivity to their day rather than impeding work tasks



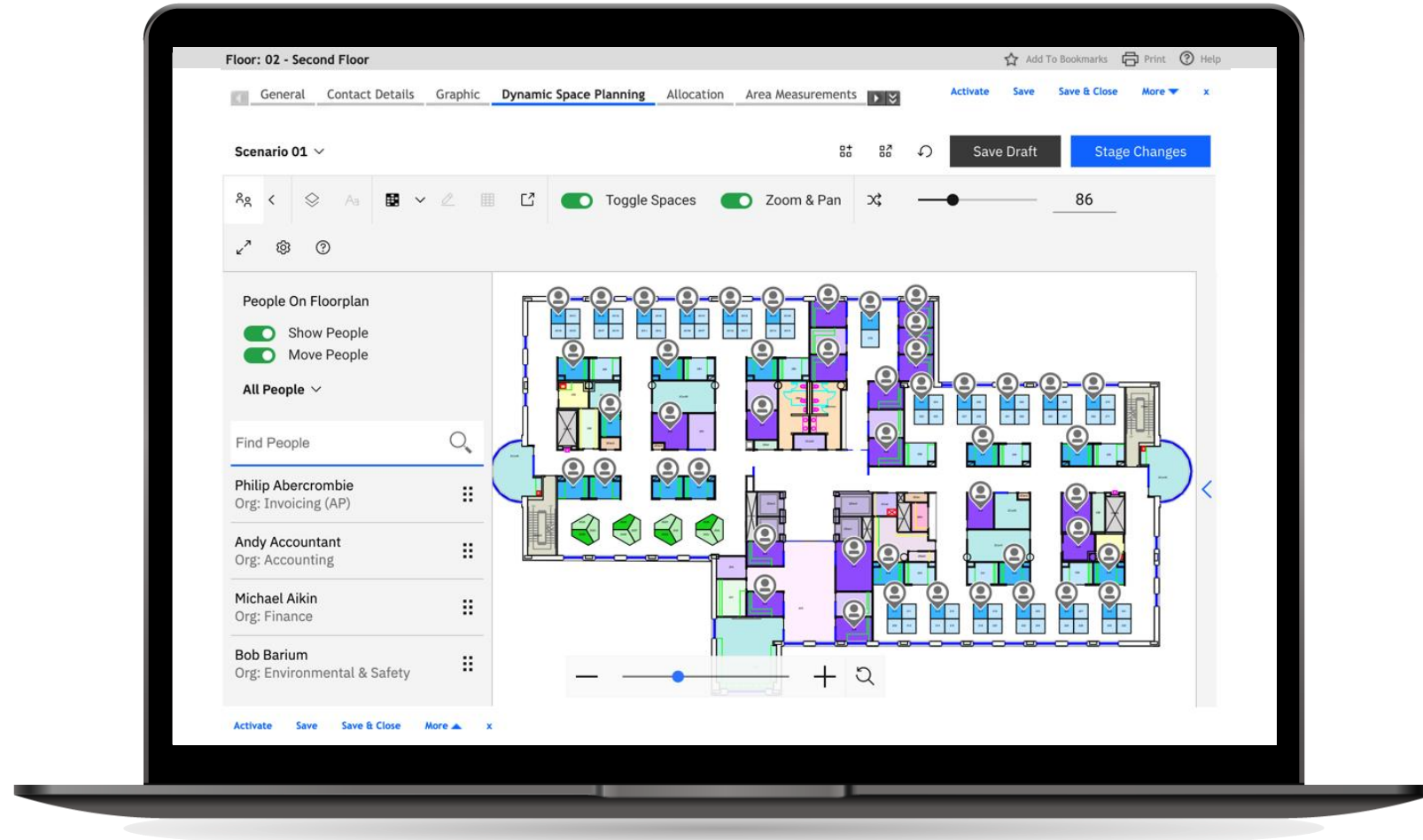
- Personal desk and meeting reservations
- Outlook integration
- Move requests
- Locate colleagues



- Indoor maps and wayfinding
- Scan-to-claim desk
- Mobile apps
- Interactive kiosks and room panels

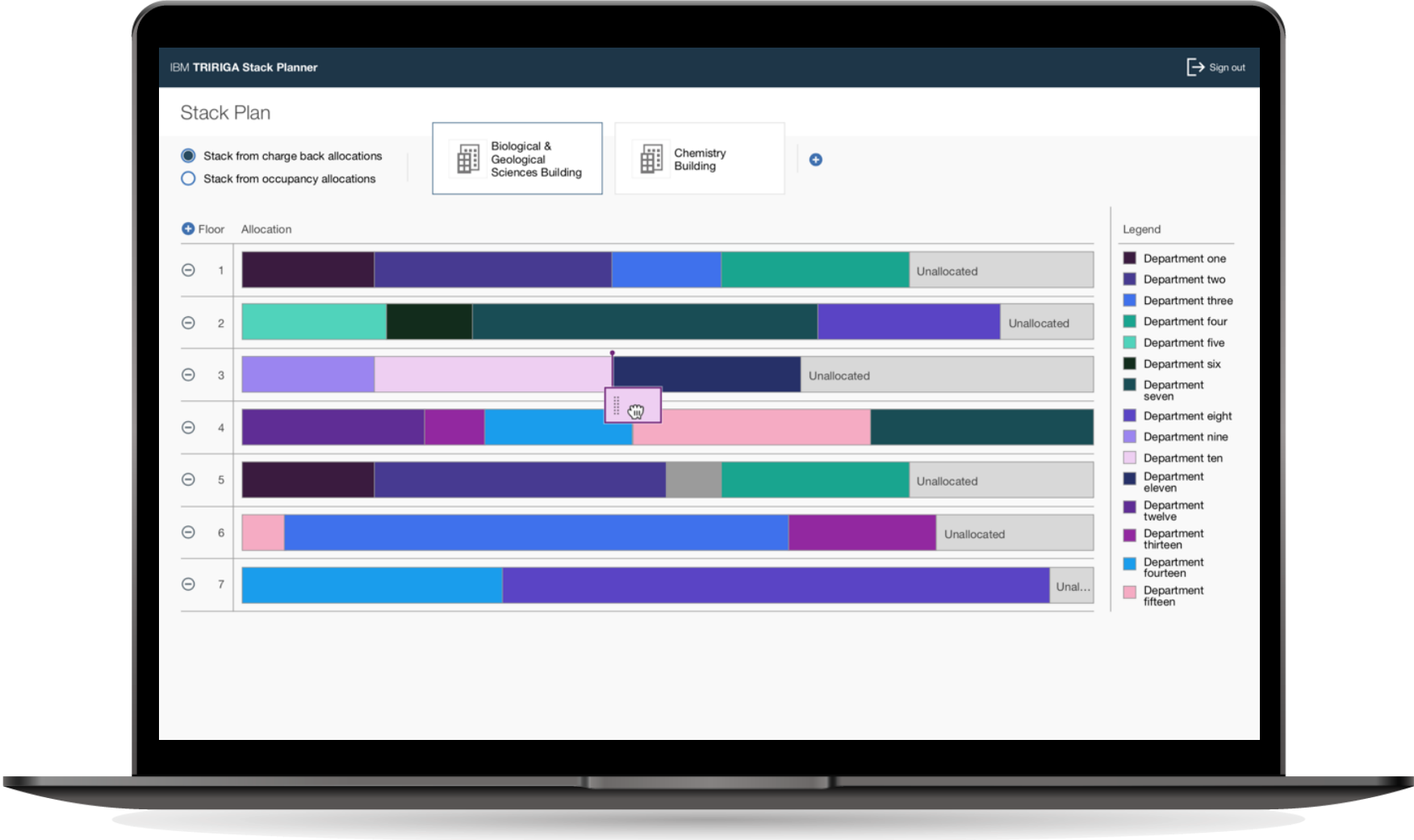
Dynamic space planning helps planners adapt quickly to changing guidelines

- 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



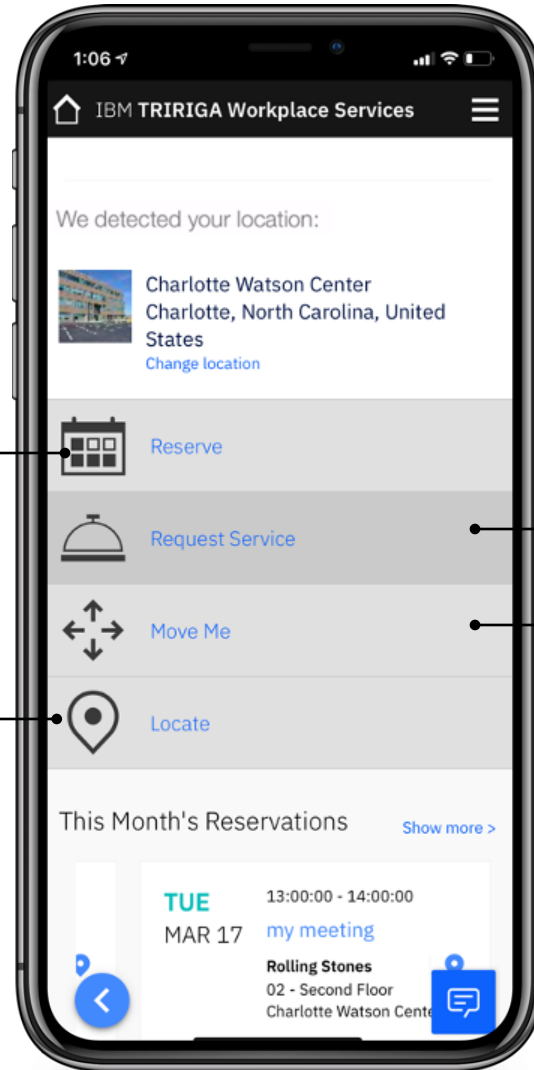
Occupants can self manage through a single app

[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



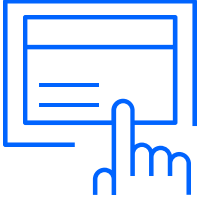
Desktop/tablet designs for the portal and apps provide a **responsive design** for power users on larger screens

Wayfinding and navigation with search for rooms and people

- Solution that provides wayfinding [within Locate App](#) and an all-new kiosk experience for visitors
- The solution includes [ArcGIS Indoors](#), a set of powerful tools from Esri, to convert and enrich static floorplans into hosted interactive maps integrated with up-to-date space data directly from TRIRIGA.



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



Optimize facility operations & utilization through insightful Workplace Analytics



Automatically pulls in the facilities location hierarchy



Collect and monitor any IoT data, BMS and WiFi data



Pre-built dashboards for space utilization



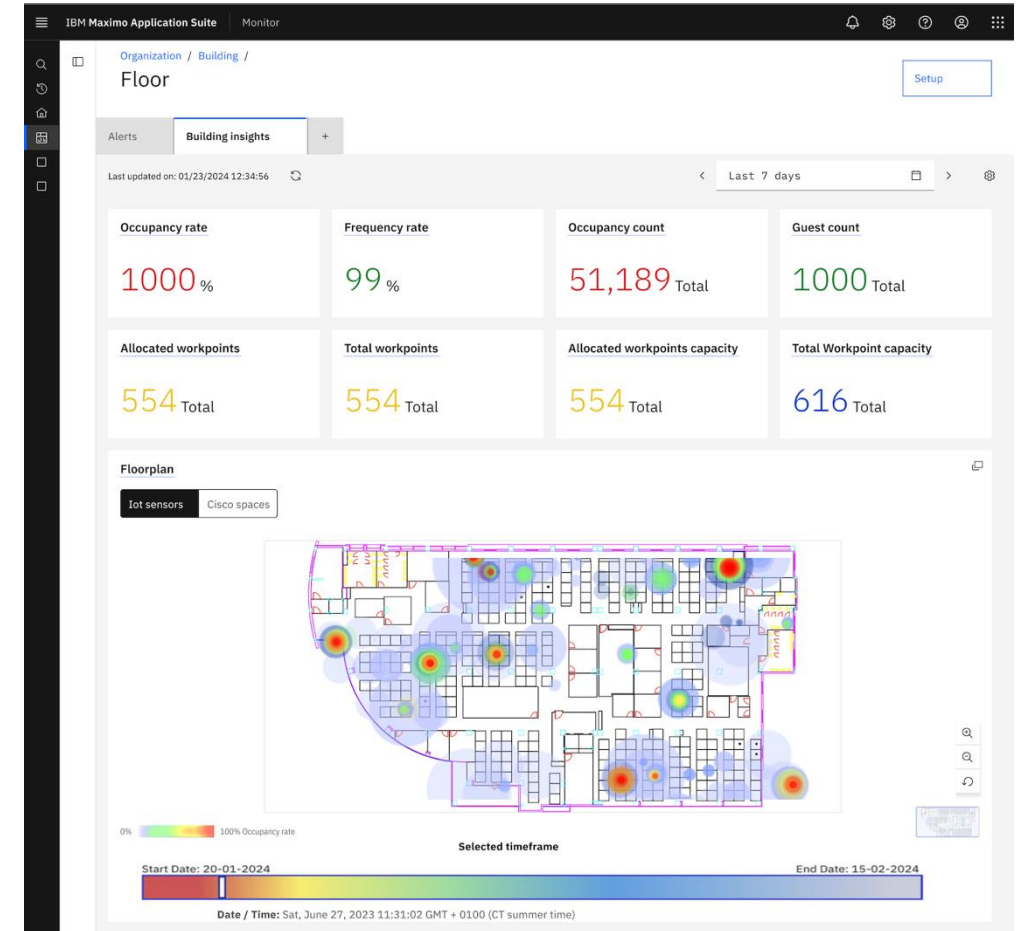
Connector library to integrate building meter & power data for leading BMS providers



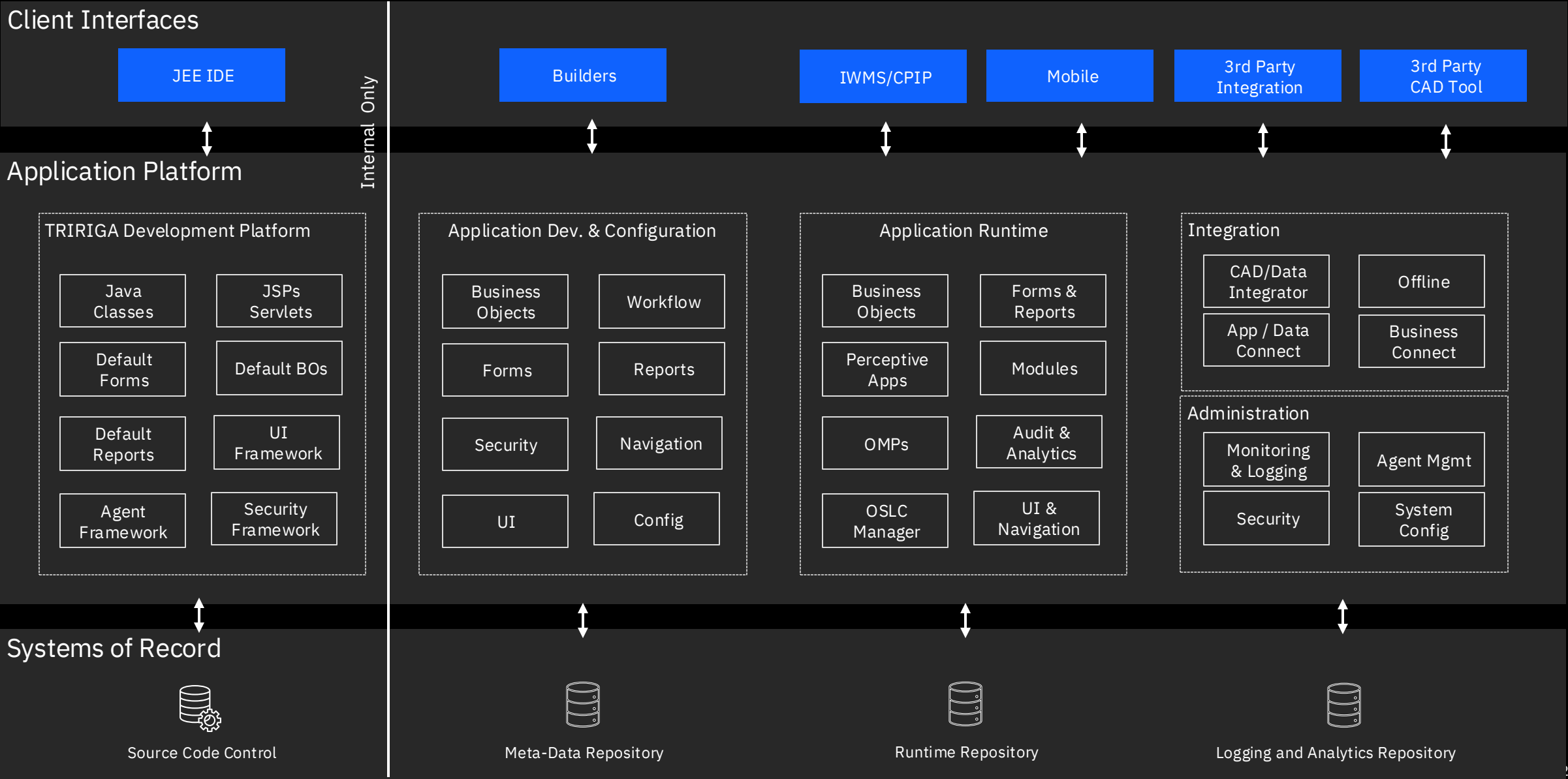
Build your own visualizations & KPIs for displaying building IoT data



Make informed decisions on office layouts, desk allocations and optimize space usage



Maximo Real Estate and Facilities - Meta-Data Driven Architecture

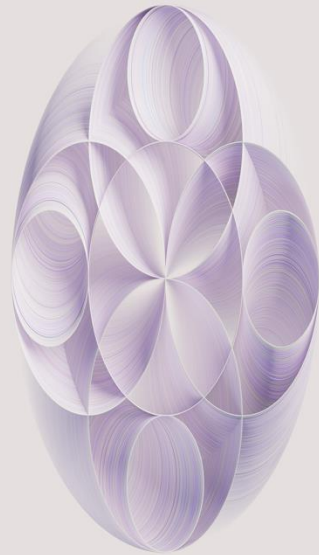


Roadmap Themes

Modernization



AI



Capital Project Management



Lease Management



Dynamic Spaces, Flexible Workplace



IBM Maximo Application Suite Real Estate and Facilities 9.1

GA: June 24th, 2025



Containerized software running on RedHat OpenShift available on SaaS and as a Customer Managed offering



App Points simplify licensing and provide flexibility as to how those are consumed across the Suite



Drawing Manager: Enhancements to upload CAD drawing directly in browser



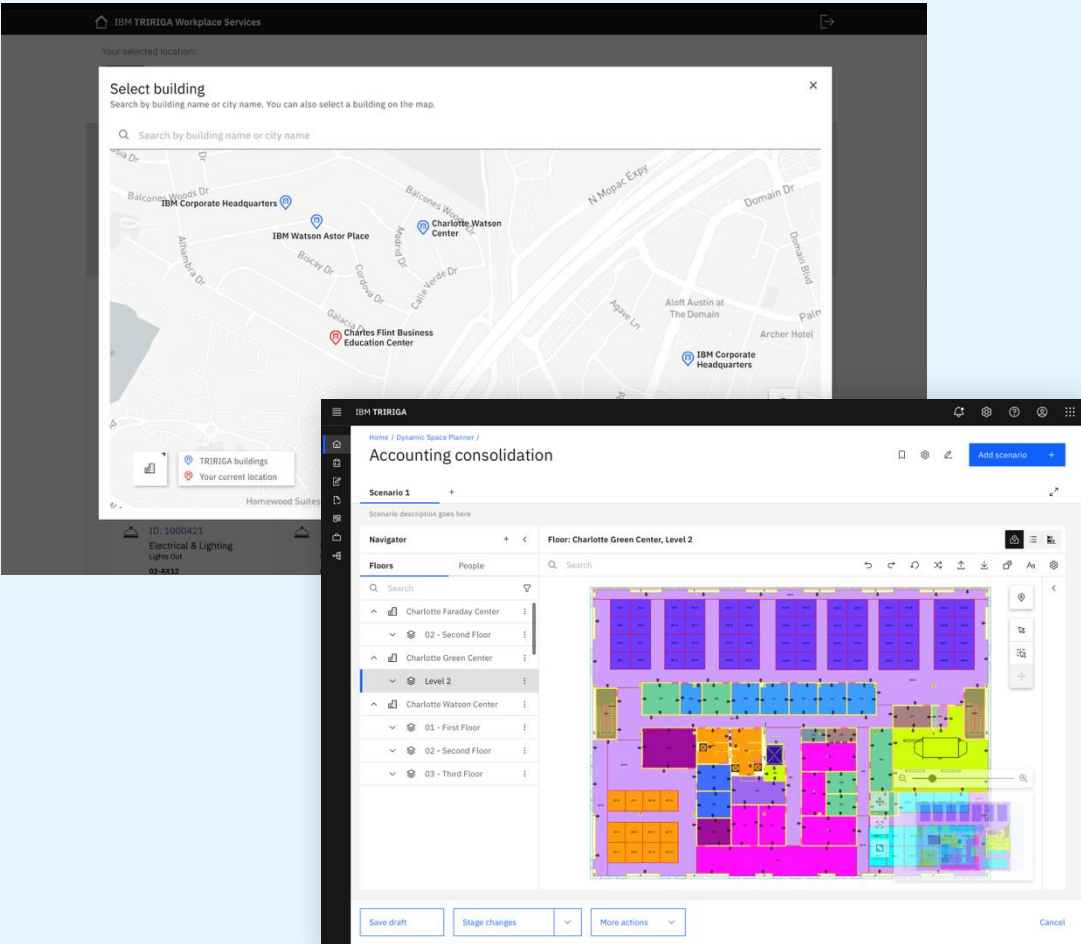
Workplace Services & Reserve: Default location handling improvements



Dynamic Space Planning: Seamless integration between DSP and Stacking



Reserve – Exchange Integration: Migrate communication from Exchange to TRIRIGA from SMTP to MS Graph subscriptions for more resilient event synchronization



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IBM Maximo Application Suite Real Estate and Facilities 9.2



Integration between MREF and Manage enables seamless operations and maintenance across asset classes, supports Maximo Mobile, and ensures synchronized data and a unified user experience



Application upgrade tooling to simplify version comparisons and accelerates upgrades for smoother transitions



Floorplan markup capabilities to visually communicate changes and drive smarter space planning



AI powered lease abstraction and discovery to save cost and improve productivity



System lockout setting prevents journal entry edits during month-end close—ensuring data integrity and compliance

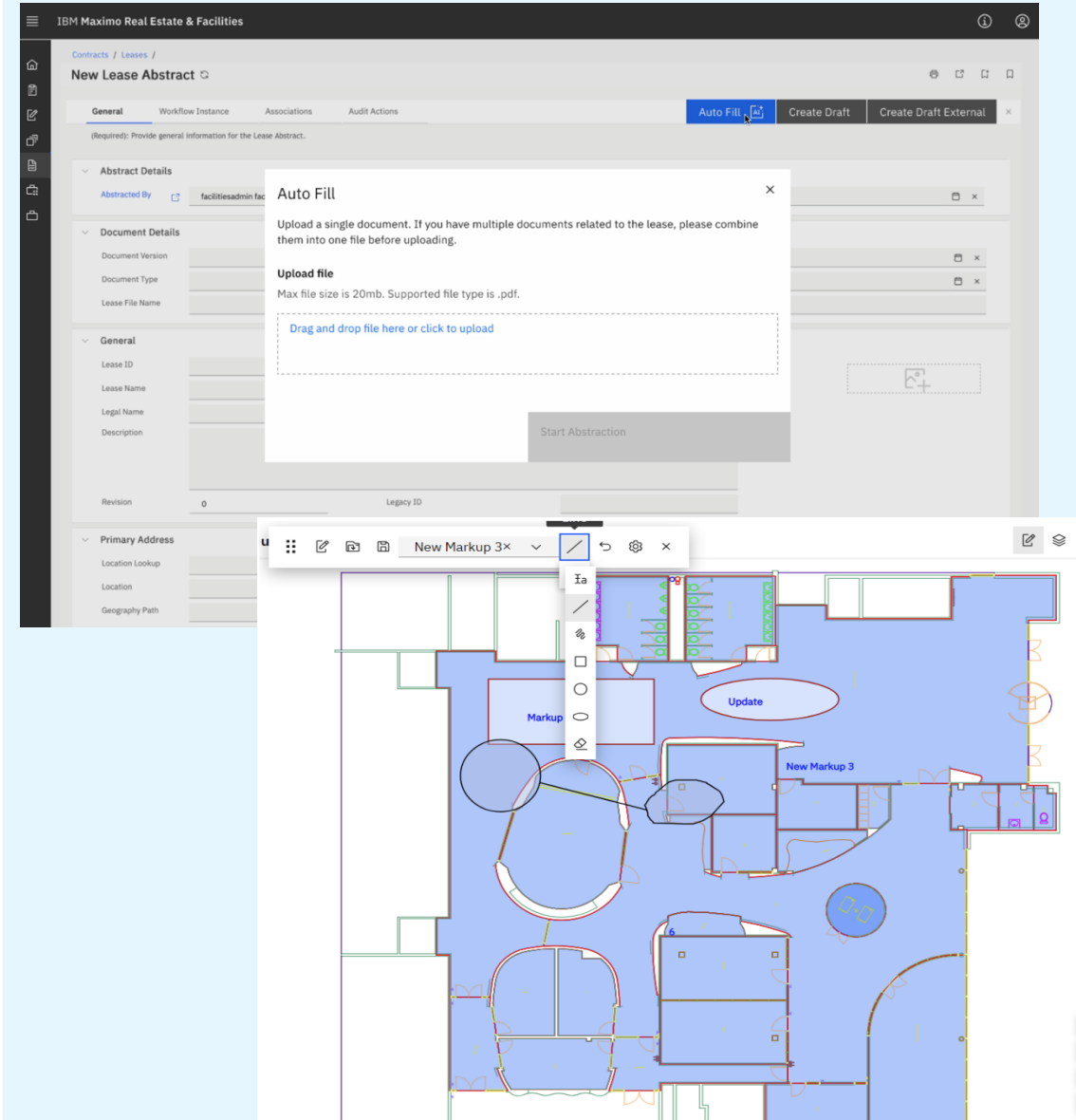


Bulk editing, improved Gantt export, and unified contracts streamlines project management across complex, multi-site initiatives



Outlook plugin enhancements drive consistent user experience across platforms

Target Delivery: June 2026



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Let AI decode the fine print— revolutionizing Lease Abstraction



AI-powered NLP extracts and classifies key lease clauses, terms, and financial data



Reduce costs and save time with Gen AI–powered lease abstraction and proactive management of key dates and obligations

IBM Maximo Real Estate & Facilities

Contracts /

New lease abstract

AI

Extract values from document

Create draft +

US10029_Lett...

1 / 32

Document Details

Abstracted by

Lease Agent 123

Abstracted date

05/13/2025

Document version

1

Document type

Lease

Inception (execution) date

05/01/2025

Effective date

06/01/2025

Lease file name

Lease879

General

Primary address

Lease contacts

Units

Location

IBN382195-009

546554v.2

Embedding AI throughout Asset Lifecycle Management utilizing **watsonx**

Failure Mode and Effects Analysis (FMEA) Generation

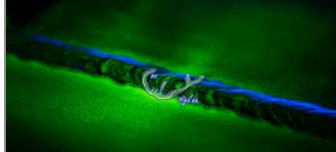


Reliability Strategies

GenAI will be used to assist with the rapid creation of new FMEAs (Failure Mode and Effects Analysis).

Language

Visual Prompt Tuning



Maximo Visual Inspection

Foundation models and prompt-tuning will dramatically reduce the effort required to train the model for MVI.

Vision

Work order Intelligence



Maximo Manage

A LLM has been trained to classify and recommend work order problem codes, which will help overcoming human error and limitations and drive insights.

Language

Target: MAS 2Q 2025

Assistant



Maximo Manage

A generative AI assistant will provide conversational AI to support a range of needs in day-to-day work as an advisor and provide automated workflows.

Language

Health: Prediction & Anomaly



Maximo Health & Monitor

Gen AI is being used to create sensor-level models trained on a small sample of sensor data. This greatly speeds time to value for asset health forecasting and prediction.

Time Series

Target: MAS 2Q 2025

Workflows



CBM

An agentic workflow will use GenAI to support the end-to-end automation of condition assessment, forecasting and taking appropriate action.

Language

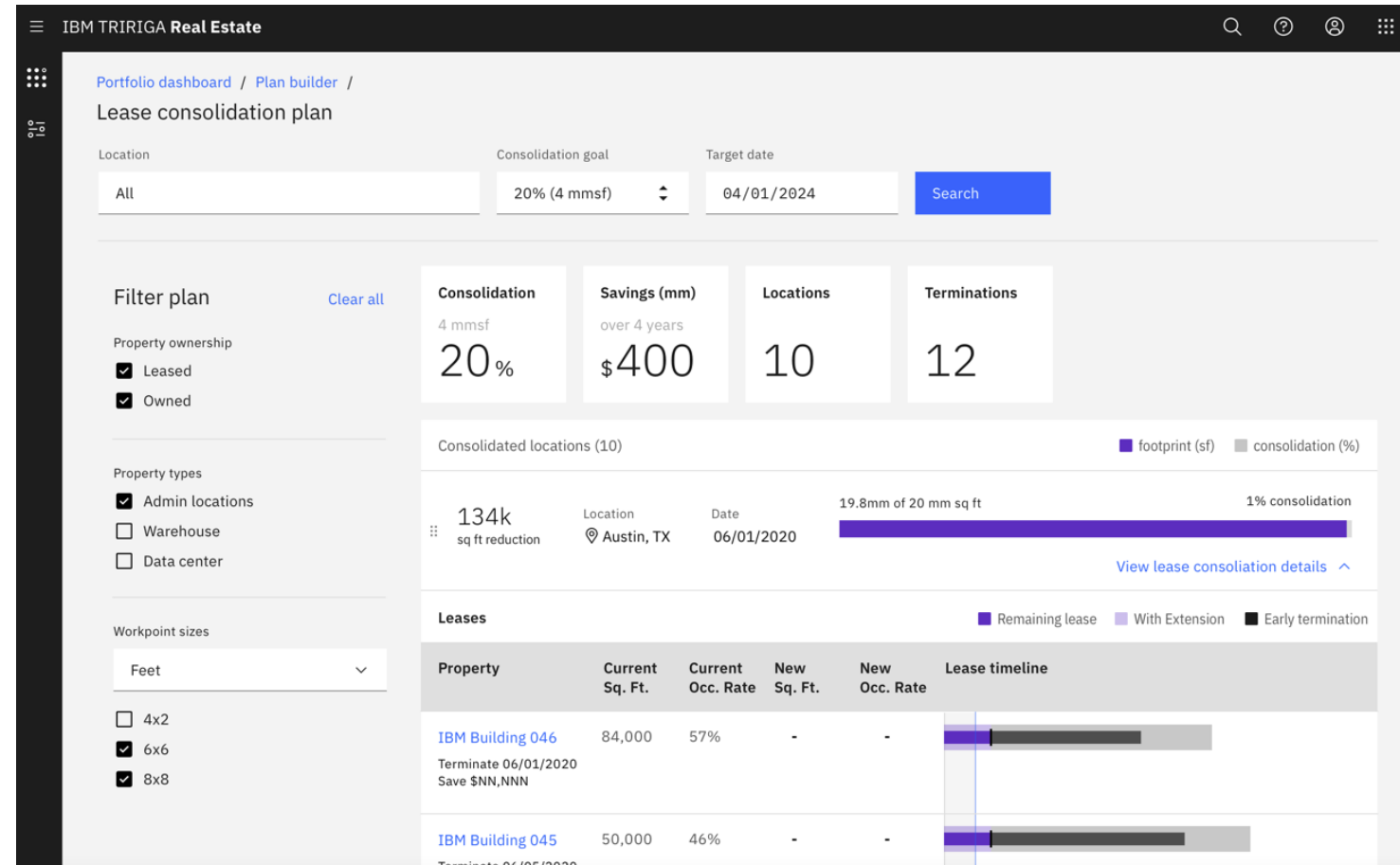
AI-driven space optimization: unlocking efficiency and cost savings

Intelligent recommendations to understand:

- How can I right-size my portfolio to eliminate underutilized or vacant spaces?
- How can I align space allocation, and workplace utilization and hybrid work trends?
- What are the best strategies for upcoming lease renewals?

Incorporate additional data to improve recommendations:

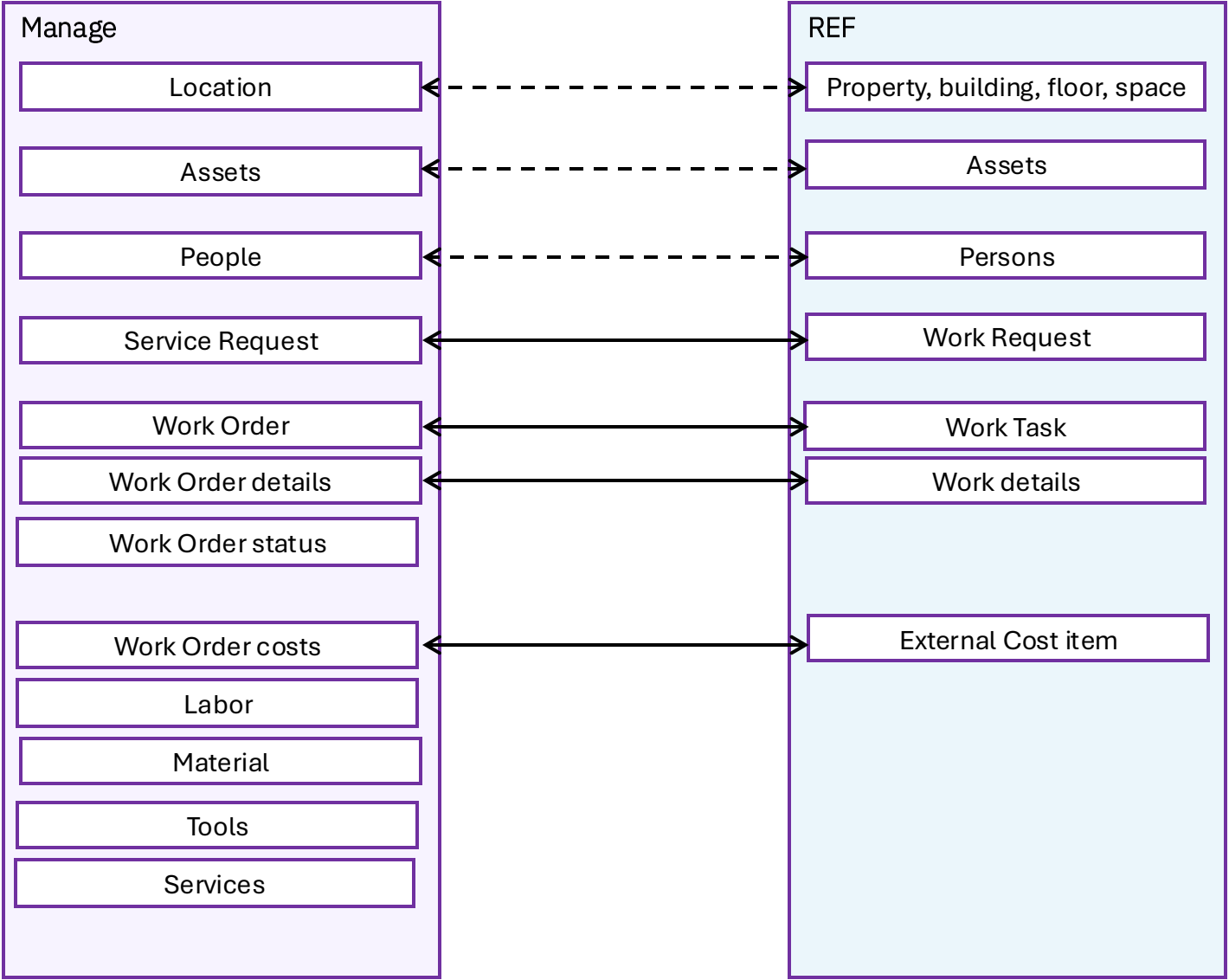
- Wi-Fi and IoT for actual utilization
- Climate risk data
- Energy performance BMS for energy consumption and cost tracking



Enable new use cases across the Application Suite



Data Integrations: Detailing the data that is required



← - - - - - → Data Foundation Integration

← ————— → Transactional Integration

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