



## PROJECT SUMMARY

**Project Name:** Barclays UK Banking Space-Asset Capture and "Branch on a Page"

**Organization:** Barclay Bank plc

**Location:** Westwood Business Park, Coventry, GB

### Project Objective:

- Accurately record Space data throughout Barclays' UK Branch Network (1,733 Properties) and also track a number of new Components in the Property Portfolio

**Software Used:** Bentley® Facilities Planner, Bentley ProjectWise, Bentley MicroStation, Bentley Redline, Bentley Facilities Reports

## FAST FACTS

- Project Completion Date: "Branch on a Page" Q3 2008
- Capital Cost of Project: Approx £65k
- Extracted new Areas and Components from outsourced Architects CAD Drawings into a Relational Database
- "Branch on a Page", will allow a user to view all the key information about a Property on a single Web Page

# Facilities Planning Software Tracks Assets At Barclays' 1,733 Branch Properties

"Branch-On-A-Page" Reporting Captures Component Data For Each Location On Single Web Page

In the banking industry, branch performance is measured in part by the customer-to-back-office space ratio. A 70:30 split, with 70 percent being space allocated to customer sales functions and 30 percent being space allocated to back-office administrative functions, indicates a good use of space. A 50:50 allocation suggests room for improvement. Given the importance of this ratio, bankers need complete and accurate facility data to make management decisions based on sales, space, and costs.

London-based Barclays Bank plc, a major global financial services provider with an international presence in Europe, the U.S., Africa, and Asia, lacked databases with enough detailed information to support this type of property management decision making for its U.K. branch network of 1,733 properties. Moreover, the accuracy of the existing data was questionable. As a result, Barclays was unable to properly analyze the cost of its sales in the U.K. and to identify opportunities for future development.

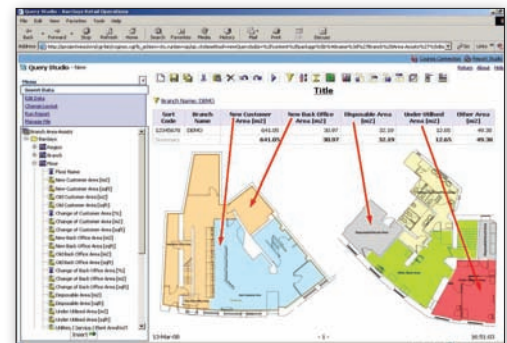
In 2008, Barclays initiated a development project to install and customize Bentley Facilities Planner software, which would provide a relational database for recording and tracking the required space-asset data for all branch locations. This baseline data allows the bank to generate "branch-on-a-page" reports for each location, capturing the customer-to-back-office space ratios and other essential information on a single web page.

Working with architects, Bentley Systems introduced improvements to the Facilities Planner computer-aided design (CAD) templates that added new areas and components to CAD drawings for each facility. Facilities Planner allows Barclays to access the new information on the fly, visualized in a drawing -- using 2D or 3D displays, labels, or interactive facility maps -- or via alphanumeric reports. The application combines the graphical power of MicroStation® with the robust engineering document management capabilities of the ProjectWise collaboration system to create a seamless, unified collection of plan-based, document-based, and database-based information.

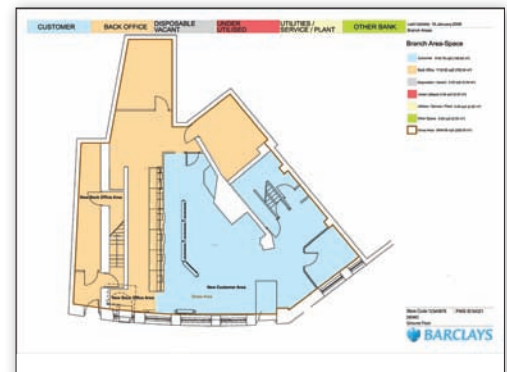
Defining the new areas that needed to be captured proved to be a challenge for the 20-person project team. The team was

geographically distributed, working out of the architects' U.K. office, Barclays' Graphical Systems office in Great Britain, and Bentley's office in Germany, and included stakeholders from diverse business lines. Among the business interests represented were retail branch management, cost consulting, and real estate planning, and each had different requirements that needed to be accommodated. However, the collaborative environment facilitated by ProjectWise helped lead to a successful project completion.

By documenting the CAD drawing rules, Barclays set standards for the architects to follow while capturing information. This ensured that drawings were consistent from property to property. Drawing rules were based on Barclays' definition of "value for space," using the zoning principles for branch properties.



Query Studio View-Branch on a Page



Ground Floor Plan

*"Having used Bentley products and services for many years gives me great confidence that the software is fit for purpose"*

## ABOUT BENTLEY

Bentley Systems, Incorporated is the global leader dedicated to providing comprehensive software solutions for sustaining infrastructure. Architects, engineers, constructors, and owner-operators are indispensable in improving our world and our quality of life; the company's mission is to improve the performance of their projects and of the assets they design, build, and operate. Bentley sustains the infrastructure professions by helping to leverage information technology, learning, best practices, and global collaboration – and by promoting careers devoted to this crucial work.

**For more information, visit [www.bentley.com](http://www.bentley.com)**

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**Banking Hall**

New CAD cells were created to capture information about components and furnishings. Because the bank wanted information about who occupies each location within a branch, attributes were set up to contain details about desk occupancy and component function. Using the attributes function, CAD operators can place a desk or counter block, then add attributes such as "personal banker" or "local business."

For properties with abundant space, such as multilevel buildings, the CAD template captures details about other business units that occupy the property. In the designated CAD layer, a new zone named "Other Bank Area" provides space to describe the business unit, such as "Barclays' Commercial." Space that is unutilized can be labeled as "Disposable" in another CAD layer.

Completed in late 2008, the improved space-asset management system allows Barclays to import CAD drawings into Bentley Facilities Planner and generate detailed reports about space use at each property in the U.K. branch network. Developed for about \$90,000, the customized application provides the foundation to back the business case for management decisions with up-to-date information.

"Having used Bentley products and services for many years gives me great confidence that the software is fit for purpose," said Rob Wesson, manager of Barclays' Graphical Systems department. "Bentley understood our business requirements and delivered the right solution on time and within agreed upon costs. The Bentley team also gives us excellent ongoing support should any technical issues arise."

The enhanced space-asset database and reporting features allow the bank to analyze branch performance and plan for improvements, as well as to anticipate how to allocate space at newly acquired and refurbished properties. The system also ties sales, space, and cost data to customer

comments, providing a basis for understanding customer likes and dislikes -- and what to change based on customer feedback. By looking at return on investment in space used at each property, the bank can make informed planning decisions about counter space, self-service equipment, and other components that increase sales.

"Information about past property performance will allow better future forecasting, budgeting, and planning, which will save us time and money going forward," said Brendan Hastings, head of the programme office. "The space-asset database improves our buying power by letting us know exactly what we have in the network. It will allow us to create model costs for future branches based on the space, components, footfall, demographics, and other parameters."

Using model costs and performance data, Barclays can now forecast costs for different size buildings and decide what components to incorporate in the facility plans for new and refurbished branches. With a more accurate picture of the entire U.K. branch network, Barclays can better understand customer likes and dislikes, which branches have an optimal customer-to-back-office ratio, and where changes should be made to improve the return on investment in the U.K. branch network.



**First Floor Plan**