

Costing Intelligence Suite

# Module 2: Mobilisation Costing

## Worked Exemplar

### Scenario Overview

**Meridian IFM Services — Heron Facilities Solutions**  
 Integrated Facilities Management | 3-year contract | £3.8m per annum

|                     |  |
|---------------------|--|
| <b>Contractor</b>   | Heron Facilities Solutions — a mid-sized managed services business   |
| Client              | Meridian Property Group — a commercial property company managing a portfolio across three sites  |
| Contract            | Integrated facilities management services: building maintenance, cleaning, security, and site management   |
| Value               | £3.8m per annum / £10.8m–£11.4m over 3 years   |
| TUPE                | 18 staff transferring from the incumbent provider: 14 x Tier 1 (operational), 3 x Tier 2 (specialist), 1 x Tier 3 (supervisor)   |
| Strategic objective | Market share build — this contract extends Heron's footprint into a new region and establishes a reference site with a client managing 14 further sites not yet in scope |
| Competition         | Two other providers shortlisted. Competitive bid.  |

This exemplar follows the Meridian IFM contract through all three modules of the Costing Intelligence Suite. Module 1 records the bid investment decision. Module 2 builds the mobilisation cost baseline. Module 3 tracks delivery performance against that baseline at the six-month point.

*This exemplar builds on Module 1. The rate card, strategic lens, success threshold, and both open challenge flags (TUPE and performance bond) are imported from the Module 1 handover file. No re-entry is required for fields carried forward.*

## Entry State and Import

**Entry state** A — Import from Module 1. The Module 1 JSON handover file is imported at the top of Stage 1.

On import, the following pre-populate:

- Opportunity name and client: Meridian IFM Services / Meridian Property Group
- Rate deck: all six tiers with rates and overhead treatment confirmed
- Strategic lens: Market share build / Growth opportunity
- Open challenge flags: TUPE and supply chain dependencies; Legal and contractual concerns

## Section 01: Opportunity Context

| Field                     | Entered value   |
|---------------------------|---|
| Opportunity name          | Meridian IFM Services (pre-populated from M1)   |
| Client                    | Meridian Property Group (pre-populated from M1)   |
| Indicative contract value | £11.4m (3-year term)  |
| Contract start date       | Confirmed on award — 12 weeks from award date   |
| Mobilisation window       | 12 weeks  |
| Indicative delivery model | Prime contractor with sub-contracted IT infrastructure and CAFM support   |
| Mobilisation route        | Low-cost controlled   |
| Route rationale           | Margin on this contract is modest at 8-10% target. Mobilisation spend must be tightly controlled. A rapid launch approach would add approximately £55k for no time benefit — the client go-live date is fixed regardless of our readiness date.                 |
| Key bid assumptions       | Vehicle fleet lease approved by finance by end of Week 2. CAFM supplier delivers configuration support by Week 8. Incumbent co-operates with TUPE information obligations within statutory timelines. Pension due diligence confirms defined contribution only. |

## Section 02: Rate and Role Setup

Rate deck pre-populated from Module 1 handover. All six tiers confirmed unchanged. One mobilisation-specific addition:

| Role                                  | Hourly rate | Note   |
|---------------------------------------|-------------|--|
| Mobilisation Coordinator (fixed term) | £52.36 (T3) | Brought in specifically for the 12-week mobilisation period; not part of the ongoing delivery team |

## Section 03: Staffing and TUPE

### Additional Mobilisation Staffing

| Role                     | Type | Tier | Rate/hr | Duration | No. | Cost    |
|--------------------------|------|------|---------|----------|-----|---------|
| Mobilisation Coordinator | FTC  | T3   | £52.36  | 12 weeks | 1   | £25,133 |
| IT and Systems Lead      | FTC  | T2   | £42.84  | 10 weeks | 1   | £17,178 |

### TUPE

|                        |  |
|------------------------|--|
| TUPE applicable        | Yes  |
| Staff transferring     | 18 — from incumbent provider: 14 x T1 (operational), 3 x T2 (specialist), 1 x T3 (supervisor)  |
| Incumbent organisation | Previous facilities management provider (named in contract documents)  |
| Consultation timeline  | Weeks 1-4 of mobilisation window   |
| Legal costs            | £8,500 (confirmed)   |
| Harmonisation costs    | £22,400 (known) — salary uplift to Heron pay scales for 11 of 18 transferring staff; 7 already at or above Heron rates   |
| Pension obligations    | UNKNOWN — challenge flag auto-generated. Owner: Head of HR. Target resolution: Week 3. Incumbent operates a defined contribution scheme; obligation type and cost not confirmed by incumbent's legal team. |

## Section 04: Mobilisation Work Breakdown

Total mobilisation cost: £276,400 across eight workstreams.

| Activity                          | Workstream     | Tier | Hours | Sub-con / NL (£)           | Class. | Cost    |
|-----------------------------------|----------------|------|-------|----------------------------|--------|---------|
| TUPE consultation sessions        | TUPE and HR    | T4   | 24    | —                          | OoE    | £1,657  |
| HR onboarding (20 staff)          | TUPE and HR    | T3   | 40    | —                          | OoE    | £2,094  |
| TUPE legal costs                  | TUPE and HR    | Ext. | —     | £8,500                     | OoE    | £8,500  |
| TUPE harmonisation costs          | TUPE and HR    | —    | —     | £22,400                    | OoE    | £22,400 |
| IT infrastructure setup (3 sites) | Systems and IT | T2   | 80    | Sub: £12,000<br>NL: £4,200 | OoE    | £19,627 |
| CAFM system configuration         | Systems and IT | T2   | 60    | Sub: £8,500                | OoE    | £11,070 |

|                                     |                   |    |     |             |      |                 |
|-------------------------------------|-------------------|----|-----|-------------|------|-----------------|
| IT and Systems Lead (10 weeks)      | Systems and IT    | T2 | 400 | —           | OoE  | £17,178         |
| Staff induction and training        | Training          | T3 | 48  | NL: £1,800  | OoE  | £4,313          |
| H&S audit (3 sites)                 | Compliance        | T2 | 32  | NL: £600    | OoE  | £1,971          |
| Client relationship setup           | Client management | T4 | 20  | —           | Rec. | £1,380          |
| Contract mobilisation management    | Programme         | T4 | 120 | —           | OoE  | £8,282          |
| Mobilisation Coordinator (12 weeks) | Programme         | T3 | 480 | —           | OoE  | £25,133         |
| Vehicle fleet procurement           | Procurement       | T3 | 16  | NL: £38,000 | OoE  | £38,838         |
| Maintenance equipment               | Procurement       | T2 | 12  | NL: £14,500 | OoE  | £15,014         |
| <b>TOTAL</b>                        |                   |    |     |             |      | <b>£276,400</b> |

OoE = One-off enablement. Rec. = Recoverable. Sub = Sub-contractor. NL = Non-labour.

## Stage 2: Scenario Comparison

Two scenarios modelled. Scenario A is the preferred approach.

|                         | Scenario A: Low-cost controlled (preferred)   | Scenario B: Rapid launch  |
|-------------------------|---|---|
| Total mobilisation cost | £276,400  | £331,200  |
| Mobilisation window     | 12 weeks  | 9 weeks   |
| Additional cost driver  | None  | Accelerated IT procurement premium: £22k. Additional T4 programme resource: 160hrs (£11,043). |
| TUPE pension exposure   | Unquantified — flagged  | Unquantified — flagged (same)   |
| Recommendation          | Preferred. Fits margin constraint. Client go-live date is fixed — speed premium has no benefit. | Not recommended. £54,800 additional spend for no time advantage.                              |

## Stage 3: AI Challenge Analysis (Scenario A)

The AI analysis interrogates the Scenario A assumptions and raises three challenge areas:

**Challenge 1 — IT infrastructure timeline** A 4-week window between supplier delivery (Week 8) and go-live (Week 12) is flagged as insufficient for a 3-site deployment. Configuration, testing, and issue resolution across three sites typically requires 6-8 weeks. Recommended action: confirm with supplier that configuration can begin on delivery day, not after delivery is complete; add a 1-week contingency buffer to the programme plan.

**Challenge 2 — CAFM configuration cost** The sub-contractor cost of £8,500 for a 3-site CAFM configuration is noted as low relative to comparable deployments. Recommended action: request a scoped statement of work from the supplier before contract award rather than accepting a headline figure.

**Challenge 3 — Pension obligations** The assumption that no defined benefit exposure exists is the single largest unquantified risk in the estimate. If confirmed as DC-only, no impact. If DB obligations exist, the cost to the contract could be material. Recommended action: resolution before go-live is essential; the owner (Head of HR) should have a confirmed position by Week 3.

*The analysis does not block progression. Each challenge is a prompt for review before commitments are made, not a verdict on the viability of the mobilisation plan.*

## Stage 5: Module 3 Handover

The Scenario A baseline is approved and the Stage 5 handover file is generated. The handover carries forward into Module 3:

- Mobilisation cost baseline by workstream: £276,400
- Rate deck (all six tiers plus mobilisation-specific addition)
- TUPE position: 18 staff transferring; harmonisation confirmed at £22,400; pension obligations flagged as unknown
- Open challenge flags: TUPE pension (unresolved); IT infrastructure timeline (action outstanding)
- Mandatory mobilisation assumptions (4 items)

*The Module 3 handover file should be generated once the estimate has been reviewed and approved. The open TUPE pension flag is noted in the handover and will appear in Module 3 Section 08 for ongoing monitoring.*