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The Capital Planning Playbook

Actionable Tips for Building Smarter, Data-driven Capital Plans

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Introduction

Data-driven capital planning is one of the most effective ways organizations can control costs, reduce risk, and make smarter investment decisions. Yet many still struggle to leverage data from their daily operations to inform their long-term financial strategy. As budgets tighten, infrastructure ages, and compliance pressures grow, leaders across all sectors are being forced to rethink how they plan, fund, and manage their assets.

For executives and finance leaders, the ability to plan with confidence depends on accurate data and collaboration across departments. Effective capital plans require visibility into asset condition, input from facilities teams, and a shared understanding of organizational goals. When decisions are based on outdated or incomplete data, the result is often misallocated funds, deferred maintenance, and growing backlogs that strain both budgets and performance.

This Capital Planning Playbook provides a structured, four-stage framework to help organizations move from reactive decision-making to a continuous, data-driven process. This playbook empowers leaders to transform their fragmented asset data and reactive maintenance into a unified, transparent, and strategic process that maximizes every dollar invested, reduces risk, and more effectively aligns facilities and finance with their organization's long-term goals.

The four steps to building a stronger capital plan

Every organization's capital planning journey begins in a different place, but the path to precision follows a similar pattern, moving from fragmented data and reactive maintenance toward a unified, predictive, and transparent planning process.

1

Strengthen your foundation with accurate asset information

Establish a centralized asset register to create a single source of truth for asset data. Accurate information on asset condition, location, and lifecycle stage will lay the groundwork for all future planning.

2

Improve day-to-day operations with tactical excellence

Use asset data to strengthen operational performance. Automate maintenance workflows, improve response times, and track inspections to prevent small issues from becoming costly repairs.

3

Plan strategically with data-driven insight

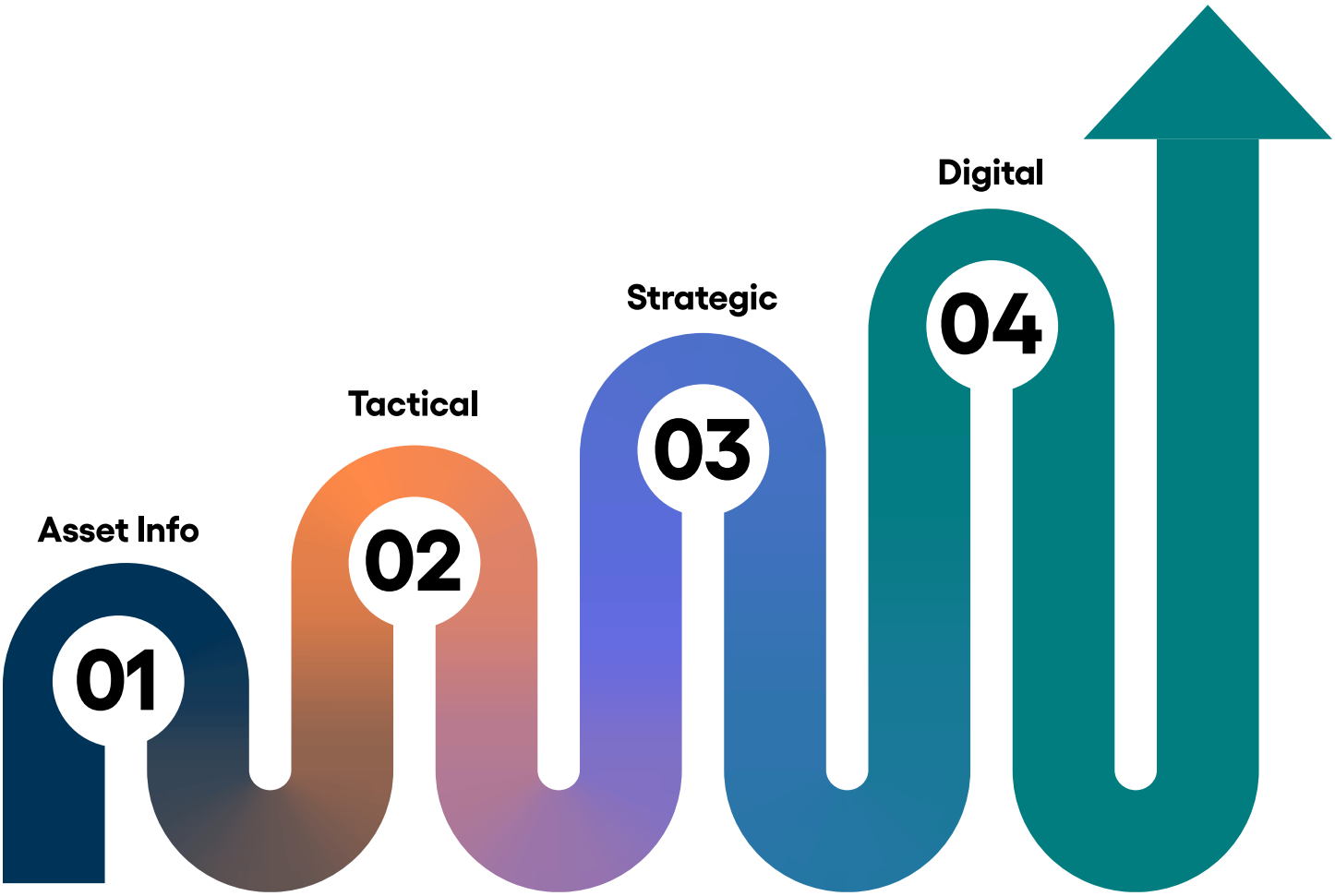
Apply Asset Investment Planning (AIP) solutions to connect asset data and operational performance to long-term strategy. Use predictive analytics to model scenarios, prioritize funding, and make informed, defensible investment decisions.

4

Digitize and integrate for full transparency

Connect systems and stakeholders through digital transformation. Integrate data from your CMMS, BAS, and energy platforms to monitor assets in real time and make capital planning more dynamic and adaptable.

Every stage of the Capital Planning Playbook builds on the one before it, creating a clear roadmap toward smarter, more sustainable capital planning. The result is an approach that unites facilities, finance, and leadership around a shared, data-backed strategy for maintaining, improving, and investing in your organization's assets.



Step 1

Strengthen your foundation with accurate asset information

Every effective capital plan starts with a clear understanding of what assets you have, where they are located, and what condition they are in. A centralized asset register is the foundation of that understanding. It provides a single source of truth that both finance and facilities teams can rely on to make better investment decisions.

What can you do?

1. **Gather** all your existing asset information from spreadsheets, inspections, and work orders into a CMMS or other centralized system.
2. **Schedule** a Facilities Condition Assessment (FCA) if you haven't already to document the current conditions of key assets and infrastructure and prioritize critical maintenance needs.
3. **Conduct** an energy audit to uncover potential opportunities to improve efficiency and cut costs.
4. **Create** simple, consistent process for inputting, updating, and tracking asset information so it's easily accessible and can be used in future maintenance and budget plans.

What is a Facilities Condition Assessment?

A Facilities Condition Assessment (FCA) is a comprehensive evaluation that measures the physical condition of a property and its systems through detailed on-site inspections. The inspection takes into account factors like age, design, materials, and asset performance to identify maintenance needs, estimate repair or replacement costs, and support long-term capital planning.

87% The majority of organizations feel confident in their asset management strategy...

32% ...yet only a small minority of organizations have completed an FCA

Step 2

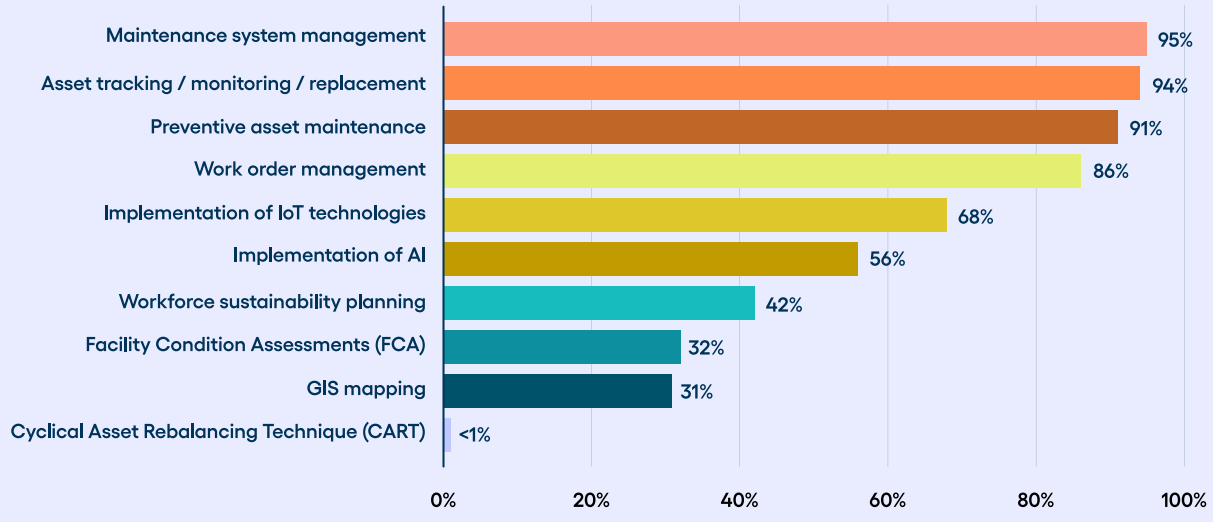
Improve day-to-day operations with tactical excellence

Once you have reliable asset data, the next step is to use that data to strengthen your daily operations. Tactical improvements help ensure small issues are resolved early, preventing costly repairs or major disruptions later on. Proactive maintenance, consistent inspections, and clear tracking processes all contribute to better performance and longer asset life.

What can you do?

1. **Start** by automating your preventive maintenance schedules so crucial tasks never fall behind or go undone.
2. **Track** your work order response times and average completion rates to identify any bottlenecks and implement new strategies for improving efficiency.
3. **Make sure** to consistently conduct regular safety and compliance inspections to catch issues early that could cause potential disruptions to your operations.
4. **Review** maintenance trends to plan for replacement costs of assets in need of frequent repairs or other high-cost infrastructure.

Most common ways organizations are using their asset management systems



Step 3

Plan strategically with data-driven insight

When you are confident your asset data is accurate and your operations are running smoothly, the next step is to connect those insights to long-term strategy. This is where Asset Investment Planning (AIP) becomes essential. AIP connects data from facilities and finance teams to forecast needs, evaluate risks, and prioritize funding so you can make confident and informed investment decisions.

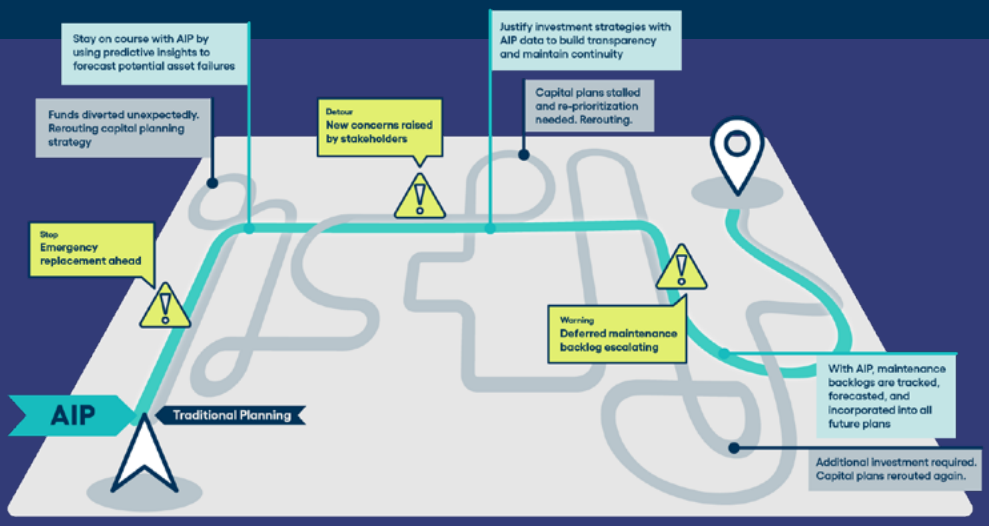
What can you do?

1. **Use** AIP tools or models to forecast your long-term funding needs based on things like asset condition, age, and risk.
2. **Rank** your capital projects by urgency, cost, and impact to ensure that funding goes to the most critical priorities first.
3. **Create** "what-if" scenarios to see how delaying, accelerating, or bundling projects could affect budgets and performance.
4. **Review** AIP data regularly with finance, facilities, and leadership to confirm alignment with organizational goals.

Question & Answer

What is Asset Investment Planning?

Asset Investment Planning (AIP) is a methodology and strategic framework that supports smarter, long-term capital planning with data-backed insights and guidance. Think of it like a strategic "GPS" for your capital plans. With AIP, you can forecast "roadblocks" and model various funding scenarios to optimize your investments and ensure maximum ROI.



AIP is like a GPS for your capital planning roadmap

Step 4

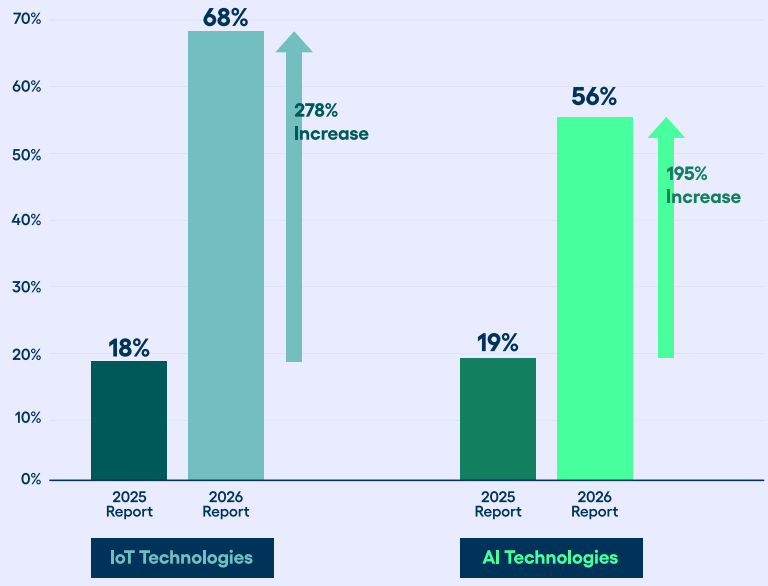
Digitize and integrate for full transparency

The final step is to ensure every part of your organization is seamlessly connected through digital transformation. By uniting people, systems, and data into one connected ecosystem, you can gain real-time visibility into asset performance and make faster, more accurate capital planning decisions.

What can you do?

1. **Identify** areas where technology can close information gaps or reduce manual work across your organization (e.g. automating data entry or linking systems together).
2. **Connect** your CMMS, energy platform, AIP software, and other tools so all asset, cost, and performance data flow into a single view.
3. **Install** sensors or meters on your most high-value assets to track energy use, equipment status, and performance trends in real time.
4. **Set** clear KPIs to measure efficiency, cost savings, and performance improvements, and use digital dashboards to monitor results, share updates with leadership, and guide future funding requests.

Shifts in AI and IoT usage for asset management



Unlock the full potential of your facilities by harnessing IoT and AI—not just to collect data, but to transform it into smarter decisions, predictive maintenance, and real-time insights.

Why it matters across industries

Every organization depends on the performance and reliability of their assets, but the challenges of capital planning can look different in every sector. The principles in this playbook apply universally – accurate data, proactive maintenance, strategic forecasting, and digital integration. But how they take shape depends on the environments, regulations, and goals unique to each industry.

Whether managing classrooms, hospital wings, production lines, or municipal infrastructure, the goal is the same: **make informed investment decisions that improve performance, reduce risk, and extend the life of critical assets.**

Understanding how these four stages translate across industries helps leaders see what good capital planning looks like in practice and how small, deliberate steps can deliver measurable results.

Want to see how organizations across industries are putting these principles into action?

Get your copy of the 2026 Asset Lifecycle Report for insights, benchmarks, and real-worl data on how leaders are improving asset performance, reducing risk, and building more resilient operations.

For Education

Capital planning provides the structure needed by school systems and universities to maintain safe, efficient, and attractive learning environments with aging facilities or constrained budgets. A data-driven capital plan ensures education leaders can justify funding, build trust among key stakeholders, and ensure all facilities investment are in line with their institution's mission and long-term academic goals.

Quick tips:

1. **Build** a verified inventory of all campus assets and facilities, and assess their condition and energy performance to identify your most critical needs.
2. **Modernize** your maintenance program with a CMMS that automates work orders, inspections, and compliance checks to prevent downtime and extend asset life.
3. **Use** AIP software to align capital projects with enrollment trends, funding availability, and strategic growth goals, helping you plan renovations or new builds confidently.
4. **Integrate** maintenance, energy, and budgeting systems to view total campus performance and costs in one place, making it easier to justify funding and track progress.

> We access the data daily to support our business needs. It's integral in our daily decision-making processes, whether we're looking up building-specific information or gathering insights for projects. It helps us stay aligned and make informed, data-backed decisions across multiple areas of our operations.

Brian Forde Jr. – Chief of Operations, Boston Public Schools

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For Manufacturing

Manufacturers need reliable assets and efficient production to stay competitive. Strategic, data-driven capital planning ensures manufacturing leaders can identify asset risk, model investment scenarios to justify funding, and ensure every dollar spent improves efficiency, resilience, and profitability.

Quick tips:

1. **Create** a complete asset register that includes both production equipment and facility systems, and link each to its role in output and quality performance.
2. **Use** asset and production data to identify high-risk bottlenecks and model the financial impact of downtime before failures occur.
3. **Apply** AIP to forecast repair needs, replacement costs, and ROI for automation or energy efficiency projects.
4. **Integrate** data from your CMMS and energy systems to track real-time performance, costs, and environmental impact across plants.
5. **Align** capital planning with workforce strategy by identifying where skill shortages or knowledge gaps could limit future productivity.

> “The data indicates our efficiency and pinpoints the areas we need to review in our process... I used the data to justify the decision to spend money and bring in a technician from the original equipment manufacturer to train the maintenance team, and now the machine is running more efficiently, and our team has a new skillset.

Michael Tran – CMMS Manager, MSI Express
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For Government

Cities, municipalities, and local authorities around the world are responsible for maintaining essential infrastructure, despite aging assets, fiscal constraints, a growing deferred maintenance backlog, and worsening natural disasters. Data-driven capital planning ensures leaders can make sound, justifiable investments and improve transparency in how public funds are being spent.

Quick tips:

1. **Build** an accurate, central inventory of roads, buildings, and infrastructure, and link it to the service levels each one supports.
2. **Track** maintenance and performance trends across departments to understand how funding decisions affect long-term service quality.
3. **Use** AIP software to model different funding scenarios, assess climate and resilience risks, and prioritize projects that deliver the greatest community value.
4. **Share** data and results publicly through dashboards or reports to improve transparency, demonstrate progress, and strengthen community trust.

> Access to real time data has allowed the department to maximize asset performance and lifecycle, manage repairs and budgets more efficiently and plan more accurately for the future.

Tom Condick – Council Manager, Somerset County

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For Healthcare

Hospitals and healthcare systems must deliver safe, compliant, and high-performing environments while managing aging infrastructure, limited capital budgets, and rising regulatory demands. A data-driven capital planning approach helps leaders prioritize investments that improve patient safety, reduce risk, and strengthen long-term operational readiness.

Quick tips:

1. **Build** an accurate inventory of all facilities and critical systems, including HVAC, medical gas, and emergency power, and assess their condition through FCAs and energy audits.
2. **Use** a CMMS to automate preventive maintenance, manage inspections, and track compliance data to ensure uptime and regulatory readiness.
3. **Apply** AIP software to identify, model, and prioritize capital projects that address patient safety, facility resilience, and evolving compliance standards while forecasting long-term costs.
4. **Connect** systems for maintenance, compliance, and capital planning to provide leadership with real-time visibility into asset health, performance, and funding needs.

> In the past, it was really hard to get capital dollars. Now that we have data and proof of what we need, people trust our data, give us the funding we need, and allow us to do what we need for capital improvements.

Keith Miller – Corporate Director of Facilities and Energy, McLaren Health

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For Senior Living

Senior living communities must maintain safe, comfortable, and compliant environments while balancing increasing resident expectations, limited budgets, and workforce challenges. Capital planning ensures that every decision supports both operational efficiency and quality of life for residents.

Quick tips:

1. **Create** a centralized view of all residential spaces, common areas, and building systems, and use FCAs and safety assessments to identify risks around accessibility, HVAC reliability, and emergency preparedness.
2. **Use** a modern CMMS to streamline maintenance requests, inspections, and compliance tracking to improve staff responsiveness and extend asset life.
3. **Leverage** AIP software to model future renovation and replacement needs, prioritizing projects that enhance safety, accessibility, and resident comfort.
4. **Integrate** maintenance, compliance, and energy data into a single platform to monitor performance, manage costs, and demonstrate transparency to residents, families, and regulators.

> It's very valuable to have hard numbers we can use to easily quantity the needs at 15 different locations. We can quickly access the data needed to show our CFO that we need funding for specific assets.

Don Johns – Corporate Operation Engineer, Immanuel Communities

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Putting the playbook into practice

Capital planning is not a one-time task or a static report. It is a continuous process of collecting data, improving operations, aligning strategy, and integrating systems. The four stages in this playbook -- strengthening your foundation, improving daily operations, planning strategically, and digitizing for transparency -- collectively form a repeatable framework that can adapt to the needs of any organization.

Across every sector, from education and healthcare to manufacturing, government, and senior living, leaders face the same challenge: meeting today's demands while preparing for the future. The solution lies in connecting data and decisions. With accurate asset information, disciplined maintenance practices, predictive modeling, and integrated technology, organizations can make confident, defensible choices about where and when to invest.

You can start today by assessing your asset data, automating daily operations, modeling strategic investments, and integrating digital tools to create a single, connected view of performance. Use Capital Planning Playbook as your roadmap to bring together facilities, finance, and leadership so your organization can make smarter investments, strengthen transparency, and build resilience for the future.

You can start today by:

- Assessing your asset data
- Automating operations
- Modeling strategic investments
- Integrating digital solutions.

Use this playbook as your roadmap—bring together facilities, finance, and leadership to make smarter investments, boost transparency, and build resilience for the future.

About Brightly Software

Brightly Software, a Siemens company, enables organizations to manage the entire lifecycle of their assets, facilities and infrastructure. As the global leader in intelligent asset management solutions for more than 25 years, Brightly's sophisticated cloud-based platform is expertly designed to improve capital planning through smarter, data-driven decision making, empower technicians to predict, prioritize and manage preventative maintenance activities, and support organizations to achieve sustainability, compliance and efficiency goals. Combined with award-winning training, legendary support and managed services, more than 12,000 clients worldwide depend on Brightly to optimize their teams, operations and strategic planning initiatives. For more information, visit **brightlysoftware.com**

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