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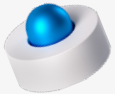
CMMS
Implementation Guide

The implementation process



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If you fail to plan, you plan to fail

Adopting a CMMS is about more than just learning new software. For a lot of organizations, it represents a full culture shift from a paper-based work process to a digital one. This shift, combined with the challenges of adopting new technology, means that a lot of CMMS implementations fail. In fact, industry standard failure rates **range from 60% to 80%**.

Reasons why CMMS implementations fail:

- Lack of support from management
- Running over budget and past deadline
- Insufficient training
- Poor end-user adoption
- Failure to make the system an everyday tool

This guide will take you through the CMMS implementation process to help maximize your chance of success and make sure you don't become part of that 60% to 80%. It includes all the tools you'll need to make fewer mistakes, avoid unnecessary costs, and cut down on the time it takes to implement a CMMS.

Discovery

1. Prepare the business case

Does your organization need a **CMMS**, or something more in-depth like **EAM software?** What objectives do you want to achieve with your new software?

It's important to define your goals as part of this process. Some areas you might consider include:

- Cost savings
- Labour efficiency
- Scrap reduction
- Inventory optimization
- Return on investment
- Health and safety
- Standardized work practices
- Compliance tracking
- Environmental objectives

These goals will help determine whether a CMMS is worth implementing, as well as the corresponding budget.

2. Get buy-in from management

Maintenance has traditionally been seen as a cost center by upper management—it costs money to hire technicians and purchase spare parts, but maintenance itself doesn't directly add to profits. This makes it hard to convince management to invest in maintenance.

A CMMS helps you move away from **reactive maintenance** (fixing things when they break) and towards **preventive maintenance** (maintaining assets so they perform when needed), making maintenance more economically valuable to the organization.

If you've done your homework to prepare your business case, you should be able to communicate the value of a CMMS to management, and show them the benefits and cost savings associated with the software.

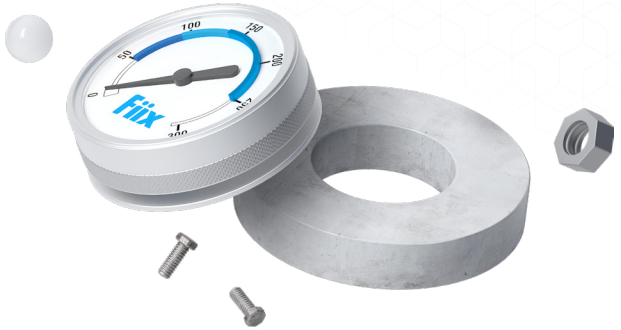
3. Prepare for change

Introducing new software can be hard. End-users might be reluctant to adopt new software if they've had a bad experience with a CMMS or experienced a failed implementation. Automation also has a bad reputation for some people, and the maintenance team might think implementing a CMMS could lead to layoffs.

You can expel these fears by involving the entire team in the implementation process. This way, they will be able to see a CMMS as a tool that allows them to do their job better, rather than something that will replace them.

Here are some tips for managing change at your facility:

- Include all stakeholders when identifying the business benefits and impacts so they have an opportunity to plan ahead.
- Hold coaching sessions, project update meetings, brainstorm sessions, and knowledge transfers to keep stakeholders informed of progress and give them an opportunity to contribute to the project's success.
- Identify any possible issues or objections early in the process, address them promptly, and help end-users understand that it's better to prevent fires rather than constantly put them out.



4. Define business requirements

Before you buy anything, it's crucial to understand what your business needs are for a CMMS.

Key questions to ask:

- What does the CMMS need to be capable of for you to achieve the goals outlined in Step 1?
- **How many users** need access to the system?
- What is the technical proficiency of these users?
- How big is your facility?
- Does your company have multiple sites that need to use the system?
- What functionality do you need?
- What key features or modules (such as purchasing) will you need?
- Do you want your technicians to be able to use the CMMS on mobile devices?
- Are you looking to **integrate your CMMS** with other software used by your business?
- Does the CMMS need to match existing processes or will current processes be reconfigured so they fit with the CMMS?

5. Define your key performance indicators and metrics

You defined your organizational goals and the business requirements to achieve those goals in steps 1 and 4. Now, you need to find the key performance indicators (KPIs) to measure those goals, and make sure you choose a CMMS that can track those metrics.

Each plant will have its own blend of KPIs. These KPIs will inform decision-making on everything from employee safety to productivity, plant efficiency, budgeting, and forecasting.

Although each facility is different, there are five main maintenance KPIs that usually satisfy 90% of organizational requirements:

Mean time to repair

Mean time between failure

Overall equipment effectiveness

PM compliance

Planned maintenance percentage

The chart below is an example of what it might look like after mapping out your organization's goals, business requirements, and KPIs.

Organizational goal:	Improve equipment reliability
Business requirement:	Ensure that the CMMS can do both time- and condition-based maintenance
KPI or metric:	Mean time between failure (MTBF)
Resources:	**The Short Guide to Maintenance Metrics**

6. Create your project schedule

Define your project timeline and milestones. The following diagram outlines how implementation is broken down and how the tasks can be performed over a typical four-week implementation.

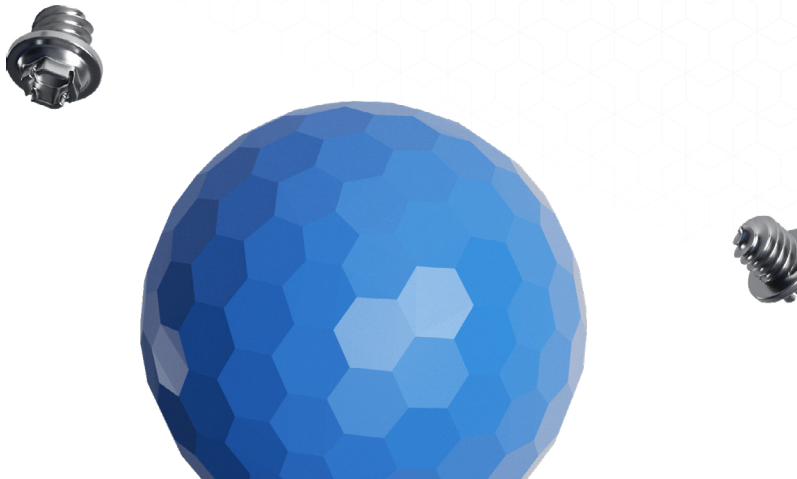
Step	Discovery phase
1	Review project and vendor implementation process
2	Determine project roles and responsibility
3	Review vendor project execution plan
4	Vendor tour of facility to view planned environment for operating the software
5	Conduct interviews with key facility personnel
6	Review existing systems and procedures
7	Identify any necessary CMMS customizations

Step	Setup and configuration phase
1	Conduct training for CMMS administrators
2	Review daily management of the CMMS
3	Data gathering from existing programs, Excel, etc.
4	Data cleansing
5	Data entry, ie. table codes and system control information
6	Perform customization and security configuration
7	Development or creation of required internal procedures
8	Train end users

Step	Go-live phase
1	Data review and security check
2	Perform user acceptance testing
3	Review responsibility of user in functional department
4	CMMS goes live
5	On-site monitoring
6	On-the-job training

Step	Six-month review
1	CMMS audit

Step	Project close
1	Conduct post-implementation audit to ensure all requirements have been met
2	Create a project review document



7. Choose your CMMS

There's a lot of software out there, which can make it hard to choose the right system. Creating a list of requirements and scoring each item by importance will let you quickly and easily compare CMMS solutions, and help you make the best decision for your organization.

Key factors when selecting a CMMS:

Features

CMMS software comes with a lot of features that help you manage everything from work orders to reports. Score each option on its ability to meet your feature requirements as outlined in Step 5.

Add-on features

Many CMMS vendors provide out-of-the-box solutions, but others might need to do some additional development to meet your needs. An off-the-shelf solution is generally more cost-effective and easier to upgrade and support.

Complexity

CMMS software can range in complexity from a simple work order application to an intricate EAM platform with an ERP integration. If the system is too complex for your needs, nobody will use it. Score the software on its accessibility and ease of use.

Training

Investigate all the available options for training your team on the CMMS. Many vendors offer onsite and remote training, but some offer in-app tutorials too. Know what kind of training is available in case you have problems getting set up.

Vendor profile

Investigate whether the vendor is knowledgeable about your

specific industry and regulatory requirements. Do they have customers in similar industries? Do they have a vision for the future of their CMMS? This will help determine if the vendor will help you achieve long-term success.

Support

Check out the types of tech support the vendor offers, such as phone, email help tickets, FAQs, or videos. What is the tech support response time? How much effort will it require to maintain the system going forward? In addition, be sure support is available in your language and accessible during your business hours.

Integration

Can the CMMS successfully integrate with existing business processes? Will you need to create and implement new workflows? Can you integrate the CMMS with other systems and software applications if needed? You may not need this functionality now, but is it something you might need in the future?

Technology

Do you purchase on-premise or **cloud-based CMMS software?** On-premise software can be a handful to manage—your company needs to provide the IT infrastructure to run the application, configure the network, and install upgrades and security patches. It's a lot more hands-on and requires a lot of IT expertise. Cloud-based CMMS applications—which are hosted and managed by a vendor— are becoming more popular thanks to their lower total cost of ownership, unlimited scalability, and easy, automatic product upgrades.

Total cost of ownership

You need to consider the initial price of the software, as well as factors like network setup and configuration,

security, license renewals, future upgrades, and scalability expenses when calculating the overall cost.

8. CMMS selection

When you have scored all your vendors using your selection matrix, simply select the vendor with the highest score and move to the next stage of the implementation process.

Check out these additional resources that offer help in selecting a CMMS:

A Short Guide to Buying the Right CMMS

CMMS feature scoring calculator

9. Select your project team, and determine roles and responsibilities

Your organization needs to decide who will own the CMMS implementation. The size of the team will vary depending on the scope of the project.

Key questions to ask:

1. Will your organization complete this project in-house, or outsource?
2. How much CMMS knowledge or software implementation experience do you have in-house?
3. How much vendor involvement will you need?

Selecting a dedicated team of maintenance and IT professionals will help ensure success. So who should be on your team?

CMMS champion/Project manager

The **CMMS champion** or project manager sets the project expectations and best practices, and guides the teams through all implementation activities.

Training director

The training director is responsible for all CMMS training at your site, and should be a maintenance professional with strong IT skills and extensive industry experience. Alternatively, the CMMS vendor can also provide onsite or remote training to your team.

CMMS implementation specialist

The implementation specialist reports to the CMMS champion or project manager and is responsible for the day-to-day rollout of the CMMS.

These responsibilities include:

- Data cleansing
- Data gathering
- CMMS setup and configuration testing
- Monitoring
- Customizations and security configuration
- Coaching and on-the-job training for users before and after the go-live date

Data migration

1. Data gathering

Gathering data is a big component of your implementation plan and a key factor in its success. In fact, missing data is one of the biggest reasons CMMS implementations fail.

The project team needs to be diligent when gathering all asset-related information, including equipment types, preventive maintenance actions, trigger frequencies, standardized procedures, spare parts information, and supplier details. Plan what is needed ahead of time to meet business requirements so nothing is missed.

2. Data entry: Tables, codes, and system control information

Uploading and configuring data in your CMMS doesn't have to be a huge task. Data from an older CMMS, Excel spreadsheets or even pen and paper records can be transferred to your new CMMS. You can knock days off your implementation schedule by importing lists for parts, equipment, and standardized tasks from Excel to the software. The time taken to complete this step varies depending on the quantity of data and the size of the facility.

3. Data cleansing (from existing programs or Excel)

Expect to find low-quality, messy, or inaccurate data from a prior system during your CMMS implementation. While existing data can be imported directly into most CMMS applications, some data manipulation is necessary before the process is finalized. Assume prior data is of poor quality and will require data scrubbing before it can be uploaded to the new system. Make sure to account for this time in the project tracker.

Training and go-live

1. Train end users

Training is the number one key to success when it comes to getting a CMMS up and running. It helps users and administrators understand the features and full capabilities of the software so they can use the system effectively and efficiently.

2. Review user responsibilities

Review the role of each user in maintaining the CMMS, preserving data integrity, and configuring the system. The CMMS specialist, CMMS champion, or project manager should outline how to manage the CMMS on a daily basis to maintain a healthy system in the long-term.

3. User acceptance testing

This is basically another way of saying that users need to check that the CMMS works the way it's supposed to work. This includes checking things like security, menu options, and permissions for each user group.

4. Go live

When all previous steps are complete, the CMMS can go live. All end users are expected to work in the new CMMS going forward.

5. System monitoring and on-the-job training

After going live, the software implementation specialist should shadow end users to verify the system is performing as expected. Are the right notifications going to the right people? Are scheduled maintenance items triggering? This also gives the implementation specialist time to spend with each end users and to provide them with training as they perform their work.

Project close

1. Post-implementation verification

The implementation is complete when all project tasks have been signed off on. Expect some changes to the CMMS configuration as the software evolves over time and users become more comfortable with the application.

2. Project assessment

Your post-project review assesses the success of the CMMS at your site. This should include a comprehensive report and executive summary of findings that are presented to the key stakeholders at the end of the project.

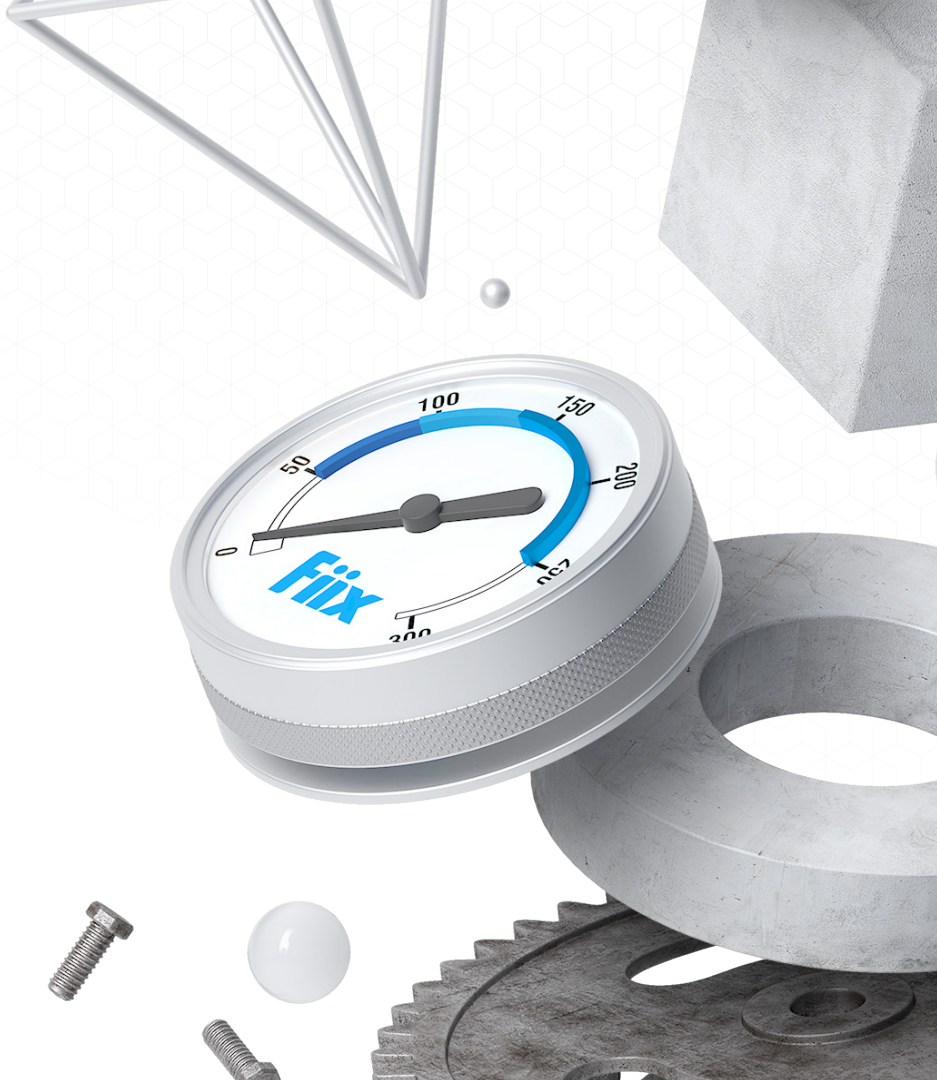
In the review, the manager should do the following:

- Measure how closely the project meets the business requirements
- Identify what worked well and what still needs improvement
- Formulate and share lessons learned and best practices
- Advise on any potential issues or risks going forward

Review, improve, and refine

Implementation isn't the end goal—it's the first step.

A CMMS is just another tool for the maintenance team, and its success depends on how you use it. To get the full benefits of the software, like better planning, greater efficiency, increased safety, and fewer costs, you have to monitor current CMMS use and take time to find ways to improve how your organization uses the software. Get feedback from users, run performance reports, monitor KPIs, and implement improvements where possible.



A last word on CMMS implementation

CMMS software isn't a magic bullet that will make your maintenance team more successful overnight. But it is a useful tool that can help drive down costs, boost productivity, and make data-driven decisions. Over time, your CMMS will become a database of maintenance-related information that can be used to establish best practices, identify workflow improvements, pinpoint cost savings, and eliminate waste.

It's not a quick fix, but a CMMS can be a critical cog in your maintenance and reliability strategy that can seriously improve plant performance if used—and implemented—correctly.

Other resources:

A Short Guide to Choosing the Right CMMS

Surefire strategies for evaluating maintenance software, getting organized fast, and finding the best CMMS for your team.

A Guide to Maintenance Metrics

Learn how to use maintenance metrics to help your business save money, reduce downtime, and eliminate headaches.

The Maintenance Manager's Guide to Digital Transformation

A guide to unlocking modern maintenance and why now is the time to do it.

Learn more

Visit www.fiixsoftware.com for information on using maintenance metrics and other tips for maintenance professionals.

Check out our other ebooks for more great resources on everything from digital transformation to building a preventive maintenance program, at www.fiixsoftware.com/resources/white-papers-and-ebooks

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