Successful CMMS Updates, Rollouts

Use this information to simplify the process.

If you're doing a major CMMS update or rollout, following some basic steps can make the project go smoothly.

SWITCHING TO A NEW CMMS vendor or rolling out a system for the first time? Jennifer Ohl, president of Coral Gables, FL-based Midwest Software Specialists Inc., says the following steps will minimize expensive mistakes, costly delays, and overruns

—*Jane Alexander, Managing Editor*

1. Define reporting requirements up front.

Start with the end in mind, *i.e.*, determine what data outputs are desired. Data outputs may be obtained as printed reports, data extractions performed on the fly, and visual key performance indicators (KPIs). The latter format is becoming increasingly popular with users as KPIs allow them to define desired target ranges and monitor performance without having to run reports.

Solicit input from maintenance managers, as well as stakeholders in departments that use CMMS. In plants without a previous CMMS, providing commonly used, standard reports to stakeholders can help them see the possibilities and, from there, determine their unique information requirements.

2. Collect and scrub data prior to 'go-live.'

Once data input and output requirements are known and data fields determined, it's time to collect data. For a new installation, the process can simply begin. For sites with a previous CMMS, existing data can be modified, *i.e.*, "scrubbed," to meet requirements of the new program.

Begin data collection and/or scrubbing as early as possible—well before a projected "go-live" date. Assign this task to personnel familiar with the data, not to IT staff. For example, stores staff should work on parts data; maintenance staff should work on equipment data. Look to your IT department for technical assistance, if needed, but make data users responsible for data collection and scrubbing.

For more information, email jennifer.ohl@midwestsoft.com, or visit **midwestsoft.com.**

3. Document vendor actions and review reports promptly.

Insist on detailed written reports from your vendor and consultants after each project session and review them with the site's CMMS team. All parties might assume information has been exchanged, but if reports aren't generated and/or read, this won't be the case.

Project-session reports should include session attendees, topics covered, decisions made, and follow-up actions. Your CMMS project team must review and discuss these reports. Having various team members summarize vendor reports at the beginning of follow-up meetings will ensure these documents are read.

4. Define vendor-communication methods regarding problems.

Count on problems to arise during implementation. Work with your vendor and consultants on how to report and handle these issues—with specifics on what to communicate by phone, email, or in person. Typical decisions might include whether to report technical problems that can be resolved locally by the consultant, or to inform the maintenance manager of an issue that emerges in purchasing. Your communication preferences should be known, reflected in the vendor statement of work, and strictly adhered to.

5. Recognize/reward key team members.

CMMS implementations consume enormous amounts of time and energy from a site's project-team members—often on top of their regular responsibilities and duties. Try to acknowledge this additional effort in a meaningful way. If monetary rewards aren't possible, consider other forms of recognition, *i.e.*, a story about an employee's contribution in the company newsletter, or a celebratory, post-implementation luncheon for everyone involved. Lack of acknowledgement has been known to cause key team members to leave organizations, taking valuable implementation knowledge and skills with them. To that end, it's always wise to share critical information among the entire team. **MT**