

Implementing CAFM A Plan for Success

Eagle Has Done this, we will help!

Companies struggle for an all-encompassing implementation plan for a CAFM system and many buy the software thinking it will solve all their problems. The software is just one component of a successful reliability program. Implementing a CAFM system will involve a plan which includes selling the concept to all involved, defining what a “successful” implementation will look like to the organization before you begin, and constant ongoing monitoring to assure data quality and process compliance of all involved. If you have never done this before, don’t worry. Eagle has helped companies just like yours maximize the value of their CAFM investment, so you have a team to partner with and lean on.

Who can be involved in the implementation and operation of a CAFM solution? We can start with the obvious, the maintenance supervisor and the maintenance technicians. Other people who might need to be included are finance, IT if you have an ERP system that you could integrate to, plant or facility managers, leads and supervisors, quality control, CFO, engineering, and even your suppliers and contractors.

Whoa you say, that’s getting bigger than I thought, maybe this is a bad idea? Not really, Eagle Technology has the experience and can guide you so the steps to success are easy and tailored to your organization. Eagle has done it many times before, and our experience is what you get beyond the software, so don’t worry, we can make this easy and take away some of your worries along the way.

One of the major reasons we find people implementing a CAFM is to mitigate risk. Being able to schedule and document tasks like dock lock inspections, sidewalk inspections, life/fire safety inspections. Another reason is to start getting those darn PMs under control. Commonly, clients go from 90% firefighting to 80% planned maintenance over a year once the system is in place.

Selling the idea

Maintenance cannot operate today without tools to manage processes, collect costs and evaluate asset life cycle. Without a CAFM system, there is no way to determine productivity, over or under maintaining, parts and resource availability. The system will give you data over time; a tool you can use to measure and manage. You must establish or review your business rules with your team. These rules are necessary to ensure consistency and to create a proactive approach towards maintenance. (Implementing a CAFM system with poor business practices accomplishes nothing). Implementing a CAFM system is not a one-time event, it is an ongoing effort. People change, they forget or get lazy, and they try to “buck” the system.

Like a payroll system or any other computerized system, it will require consistency and discipline forever to be of value to the organization. This is true for any CAFM system. Define responsibilities, make sure the team has top management support, and charge forward with your plan.

The team of stakeholders can include the controller or CFO, the CIO or top IT person, a project manager to track progress and make sure the plan is being worked (this can be the maintenance manager), and the inside maintenance and contract vendors (you want to take responsibility for tracking all maintenance) and of course, the Eagle team to assist in your plan and implementation, because this isn't our first time. Below each step are the suggested responsibilities based on our experience.

Make sure the goals you identify are kept in front of the team, (it's like assembling a 5000-piece puzzle, you always look at the picture on the cover). The system we are proposing meets your request today, but tomorrow things will change, and because we are dedicated to being a partner, we will make those changes with you, the system will change to meet tomorrow's needs. Needs that you didn't anticipate today because your success is our success.

We will work with you, listen to you, and incorporate change as a part of our relationship.

Before beginning the implementation process, a matrix of assets should be assembled. Without knowing what you are maintaining, it is impossible to develop a strategy for implementation. What is most important, is there expensive equipment that is critical to the operation? Are you going to add equipment as break-fix orders come in?

Having a detailed understanding of the capabilities of the system, you can make intelligent decisions revolving around implementation processes. With all of this in mind, here are some suggested steps for the implementation of your Proteus MMX system.

You will have to determine nomenclature for assets, the "success definition", starting points, responsibilities, field naming options, field requirements, etc. are issues that decisions pivot around. Making some of these decisions before exposure to the full team can help smooth the selling process. During the team overview, be open to ideas and suggestions. Eagle will provide all training related to CAFM.

Pre-deployment technical considerations:

There are several considerations to be made before taking the system "live." These are outlined below:

- Eagle will set up the site for the client on Azure in an HTTPS environment along with a test site for testing, training, and future enhancement review.
- Browser compatibility. Make sure that all users have access to current generation web browser software. Responsibility: Client
- Wi-Fi availability. This is a consideration when using the Proteus MMX mobile app. Having an available Wi-Fi network for all mobile users ensures seamless work. Responsibility: Client
- Basic PC literacy. Too often, this is overlooked when implementing a new software tool. Make sure that staff is comfortable with general PC and Windows use. Lack of PC literacy can make any software implementation fail. Responsibility: Client
- Network security requirements. What are your IT restrictions? Verify that end-users will be able to access Proteus MMX before deployment.

Deployment and on-boarding

1. The project stakeholders need to be identified and should have an orientation to the software. This orientation is not considered training but will give the project decision-makers a list of issues that need to be addressed in terms of the specific project.
Responsibility: Client and Eagle
2. Decide how you are going to approach implementation. If you don't have all your assets in the system, that's ok, they can be added as you discover or identify them.
Responsibility: Client
3. Do you have parts inventory? Is it accurate? Can that wait till later?
Responsibility: Client
4. Is there any data that is good that you can import into the system?
Responsibility: Client and Eagle
5. Can you identify the facility or plant to build your "location tree"? An advantage to doing this first is it allows you to write work orders to the location, so you could start capturing data right away.
Responsibility: Client
6. Determine the default things, like the types of work you want to track (MECHANICAL, PLUMBING, CARPENTRY, PAINTING, ETC), the reasons for failure or break/fix work you want to track (NORMAL WEAR AND TEAR, VANDALISM, WEATHER). Eagle has defaults for these and other standards, and they can be customized to your needs during the implementation by the person designated as the system administrator.
Responsibility: Client
7. Eagle provides import templates making the collection of data as easy as possible. This data will be loaded for you by Eagle as a part of the implementation process. Sometimes it will require a test load and then a final load depending on your needs.
Responsibility: Eagle and Client
8. In your plan, identify the target date for the first work order to be produced. This should happen very soon after training. Start testing your processes with these work orders. Be ready to modify processes if the desired results are not obtained. The success of your implementation will rest on your ability and dedication to the people processes which feed data into the system.
Responsibility: Client
9. Identify who needs to be trained, what their responsibilities are, and when their training needs to begin. Not everyone may be involved with the system at the start. For example, you may want to dedicate time for equipment/asset entry and some key maintenance scheduling. You have the option to do this before system installation using the import templates provided by Eagle, or your project may use COBie, and all the data will be imported into the system from BIM in the COBie format. You may want to start with specific crafts using the system, so only

they need to be trained or you may want to start with a single facility as a pilot. Remember to document the procedures and share them with the trainer to assist you in successful implementation.

Responsibility: Client and Eagle

10. Schedule the training, keeping in mind the time-off of individuals, your overall implementation plan, and timeline.
Responsibility: Client and Eagle
11. Stay involved in the training process. Ideas and questions will arise which have nothing to do with the software. There will always be something you haven't thought about which comes up in the training. While you think you have established the perfect set of processes, remain open-minded to change.
Responsibility: Client
12. Review the standard reports. Knowing the type of information that is captured in your system. Define what measures are most critical to your success plan. If there is a need for special reports, those can be produced, but again the data must be in the system.
Responsibility: Client and Eagle
13. Once your information is in the system, it's not the end of the process, you can review your processes with your team, is there something that needs to be added or changed?
Responsibility: Client
14. As you use the system, start looking at the data. How much of your technician time is being recorded? Are you only doing PMs and not break/fix work orders?
Responsibility: Client
15. Would it be easier if your equipment had identification, like a QR code or Barcode? What about RFID tags?
Responsibility: Client
16. Do your technicians seem comfortable with mobile devices or haven't you implemented them. Using a mobile device (Eagle recommends Zebra) improves data quality and overall technician productivity.
Responsibility: Client
17. Work on the plan. Keep your team and management involved in the results of the project. Because the system requires people, you will never be done.

Turnover, changes in operating requirements, and many other factors require someone to be the champion of the system on an ongoing basis. As the maintenance/facility manager, the financial and labor information derived from the system will allow you to report more effectively to your superiors. You will be able to better explain the value of the services your team provides to the organization. You will have tools to communicate the need for asset repair or replacement that CFO's and CEOs understand dollars and cents.

18. Once you have the system working well you can expand the use of the system adding integration to the factory floor or Open Blue and Schnieder Integration.
Responsibility: JCI -Client-Eagle
19. The people you serve should understand what you have done, and how it will aid them in their daily operations. Maintenance is a service department, and just like IT, you should begin to set service level agreements. Not every work request should be an emergency. Set priorities that everyone in the company understands. Define who can request work.
Responsibility: Client
20. Work with the Eagle periodically to review your use of the system. Are you using all the capabilities which will enhance your ability to manage? Do you understand the ins and outs of features and reporting? Is there something you need that the software doesn't seem to address? Open communication with Eagle can result in a new feature being added to the system, a new report being created, or a workaround identified which will meet your needs. Eagle is your ongoing partner in success.
Responsibility: Client and Eagle
21. Plan for additional consulting/training from time to time to make sure everyone involved is consistently up to speed on how to use the system. Remember the system is only as good as the data going into it.
Responsibility: Client

Sample Project Plan

