

THE ESSENTIAL CMMS IMPLEMENTATION — GUIDE —



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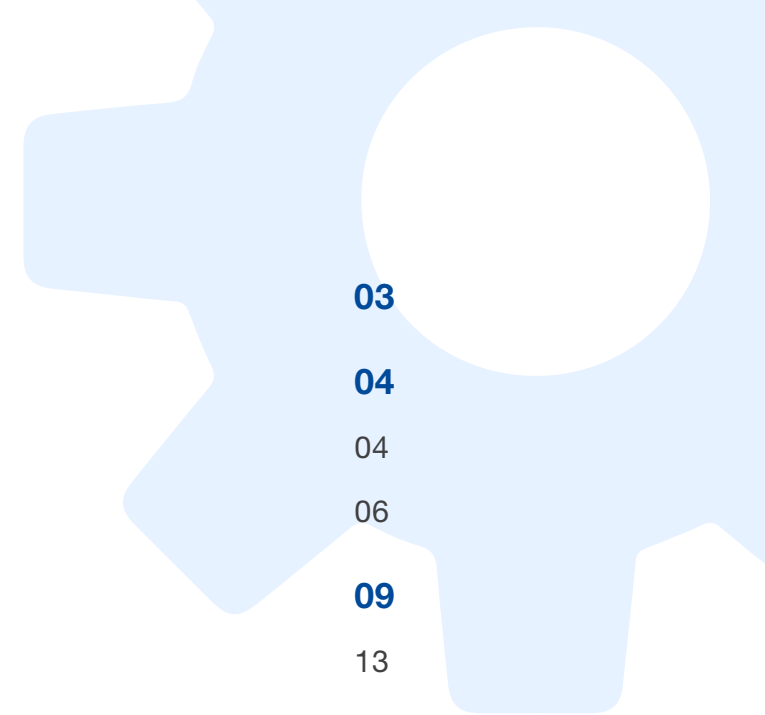
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Introduction

While most facilities can benefit from a CMMS, it's not always clear how to implement one successfully. In fact, CMMS implementation can be a task fraught with headaches, with many CMMS projects failing to launch, according to an UpKeep survey.

More often than not, the reasons for failure to launch stem from a few key areas that can be addressed with the right CMMS partner. This guide will help make your CMMS implementation a success, so you're not just another negative statistic.



Why Do Some CMMS Implementations Fail?

Maintenance teams face a number of challenges when attempting to implement a CMMS. Some of the most common challenges include the following.

Common Challenges of CMMS Implementation



Difficulty of Installing On-Premises Software

Many CMMS solutions consist of complex on-premises software. Each stage of the implementation process must be handled in-house, from installing the software on your servers to making sure data is migrated over correctly. As updates come out, it will be on you to install those updates using your own time and resources.



Complexity of On-Site Software

The complexity of some on-site CMMS systems can make them difficult for your staff to use, and that makes training more challenging. In some cases, that learning curve can foil deployment. Even with a user-friendly solution, there's still some training required to make sure the system is used correctly.

On top of that, many of the features included with the software aren't even used, which could decrease the cost-effectiveness of the system. Statistically speaking, only about 6% to 15% of on-site CMMS users utilize their system to its fullest capacity.



Infrastructure Requirements

In order for a CMMS to be usable, the IT infrastructure in place needs to be able to support it. At times, the IT network may need to be upgraded in order to support the features the system provides.

For instance, many CMMS softwares rely on an internet connection for much of their functionality. Without stable internet, the system won't be as reliable.

Additionally, intranet—connectivity within the facility—needs to be fast and stable as well. If the system proves sluggish, it can lead to user frustration, and it can ultimately lead to your maintenance team refusing to use it and reverting to older methods.



Change Management

An effective change management process is absolutely crucial to CMMS implementation. Adding CMMS software to your process will represent a change in the way your facility goes about its business, and your staff may be resistant to that change. In addition to making sure the technical aspects of CMMS implementation are handled correctly, the changeover process itself needs to be conducted in a way that helps everyone get on board.

Not only does there need to be employee buy-in, but your crew should also be well informed about new processes, how they will work, and what will be expected of them. If this process isn't handled well, your maintenance personnel could lose faith in the system and opt for your old maintenance management methods.



Main Areas Where CMMS Implementations Fail

There are several huge ways to mess up a CMMS implementation, and most failed projects suffer from one or more of them.



Planning

Planning is a vital step in the process, and one that is so often missed. A CMMS by itself won't fix maintenance problems that plague a facility. In order to implement a CMMS properly, you need to create an action plan that includes:



What kinds of data you want to track.



What kind of functionality you need.



What kind of budget you have.



Stakeholder approvals and buy-in.

Immediately investing in a CMMS without a plan is a massive mistake that can kill a project on arrival.



Implementation

The step with the widest variety of places to fail is probably in the implementation step.

There's more to this than installing the software and starting work orders. Implementation involves tons of critical factors:

- **How is data being migrated from previous systems?**
- **Is there a preventive maintenance plan designed and ready to be scheduled?**
- **Has the software been tested in an area before being rolled out to the whole facility?**
- **Is everyone communicating on when things are rolling out?**

At this stage, communication, testing, and planning are still super important parts of the CMMS implementation process.



Training

When a new asset comes to a facility, maintenance staff need to be trained on usage and maintenance tasks. The same is true of a CMMS, but facilities still continue to overlook this step.

Training should not be a one-time thing either. Continuous training is incredibly important, especially if a CMMS receives updates for new features. When an organization skimps on training, maintenance staff won't know how to use the system that's supposed to make their jobs easier.

Besides, it's proven that training increases adoption – don't let this kill an implementation!



Data

The data collection process can destroy a CMMS with ease. If you put garbage data in, you get garbage data out.

Maintenance teams need to understand what kinds of data they need to input. Hands-on training can help



Company Buy-In

Along with the logistics of implementing a CMMS, another cause of failure is a lack of company buy-in. Not only do your employees need to believe in the new system, but your executives and other higher-ups need to as well. We'll cover senior management and team buy-in later on.

Effectively presenting data on how a CMMS can improve the cost-effectiveness of your facility—ultimately reducing overhead—is just the first step in getting executive support. Additionally, you need to make sure you have realistic deadlines in place for the implementation process. If there are regular delays during implementation, you may lose critical support.

It's also important to have someone who's able to sell the vision to each person in the organization. Team members need to know what's in it for them, but each role might have a different motivator. What's in it for the CEO is different than for a maintenance technician.



Confusing Tools With Strategies

Another common failing point is where maintenance teams are confused about the purpose of a CMMS. Often, it can be easy to consider a CMMS to be a strategy in and of itself, rather than a tool meant to support maintenance strategies.

In order to be effective, your software needs to support an existing preventive maintenance process. If that process isn't in some way present already, then a CMMS will essentially just be a work order program.



Workflows

With a new system comes new processes, and it's important to make sure your workflows are updated to make the most of your CMMS. Items such as entering work order information, automating routine tasks, and incorporating the system into maintenance planning should be worked into your maintenance processes.

Failing to implement these workflows may lead to your maintenance team abandoning your new software and reverting to less effective processes.



How to Overcome the Challenges of CMMS Implementation

The challenges and common causes of failure from the previous section can be overcome by choosing the right software and taking enough time to plan out the entire implementation process. Over the course of implementation, the following tips and best practices can help your maintenance team use a CMMS successfully.

Begin Focusing on Proactive Maintenance

Again, without a sound maintenance strategy, your CMMS will be little more than a work order management system. In order to be truly effective, you'll need to have a proactive approach to maintenance in your facility.

When it comes to switching from a reactive to a proactive strategy, it's often best to take a gradual approach. Pick a key asset in your facility, determine some preventive maintenance tasks you should perform for it, and then start creating recurring work orders. As your team gets used to maintaining that asset

in a proactive way, start rolling your preventive maintenance plan out to other assets in your facility. Over time, your facility's culture should start to shift to a proactive mindset.

Also recommended is using a reliability-centered maintenance strategy on a small asset to move it in a proactive direction. Preventive maintenance tasks aren't the only answer, and sometimes run-to-failure can be the right strategy.



Establish Clear Objectives

It's vital to know what you want to achieve with your CMMS. Some possibilities include:



Reducing equipment breakdowns.



Easing the administrative burden of preventive maintenance.



Supporting predictive maintenance processes.



Improving MRO inventory management.



Tracking maintenance data.

Your objectives may include one or more of these, but it's important to make sure your goals are based on your plant's needs. In addition, you'll need plans for how these objectives will happen—keeping the functions of your CMMS of choice in mind—and how to measure success.

When determining what objectives are best for your facility, consult with personnel at all levels, from your technicians all the way up to your maintenance manager. Additionally, people from other departments (IT, operations, etc.) should have some input as well. That way, nothing gets left out of the decision-making process.

Outlining these objectives will help you determine whether implementation is a success or not, and it will also inform what kinds of modules you'll want to invest in.



Get an Implementation Process Together

The process of implementing a CMMS needs to be adequately spelled out, complete with timelines and milestones. Some key points to consider when creating your CMMS implementation plan include:



How data will be collected and inputted into the system.



How IT infrastructure will be brought to standard.



What shape training will take.



Who will perform each task.



What hardware will be needed to support the CMMS and implementation objectives.

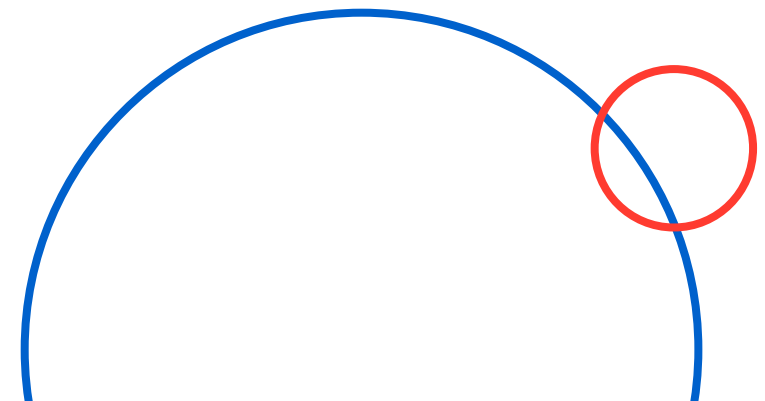


What workflows your maintenance personnel and other employees will need to follow.



When each task will be completed.

It's important to make sure the whole organization is in on the implementation process, but it also helps to have one person who will spearhead the operation and help bring all other parties together.



Train on the Purpose of a CMMS

As you implement your new system, your personnel will need to be trained on how to use it. That means training them on how the CMMS is intended to support a preventive maintenance strategy rather than act as a strategy unto itself. Illustrating the purpose of your software will help head off any misconceptions that may arise with respect to its intended usage.

It's also vital to get employee buy-in. By showing how a CMMS will make their jobs easier, you'll get the support you need in order to make sure the new software is used properly. We'll cover team buy-in further later on.

Consult With the Software Provider

The best CMMS providers will offer plenty of support to help you get your new system off the ground. Consulting directly with the vendor can help you determine which features are necessary to support your maintenance goals. It can also help with the technical aspects of implementing the software into your existing processes.

Aside from their customer support, most providers offer instructional resources as well, which can be vital during implementation and throughout employee training.

If you're curious about how you can ensure that you pick the best CMMS provider for your needs, check out our [CMMS Buyer's Guide](#), where we guide you through what to look for in a provider.

Get Buy-In From All Levels

It's vital to get buy-in from all levels of your facility, from maintenance personnel to high-level executives. Training your employees on the purpose of a CMMS and illustrating how it can improve the workplace can help get employee buy-in, while illustrating the potential benefits of the software to senior-level managers and executives can get you the administrative support you need.

Basically, senior management provides the funding, while the entry-level staff will actually use the software—just as long as they believe in it.

Use a Mobile CMMS

Finally, an easy-to-use and easy-to-implement software system will make the process much smoother and eliminate many of the obstacles that may impede implementation. Mobile and hosted CMMS software save much of the hassle that on-premises software often entails, ultimately improving the odds that implementation will be successful.

What Can I Do If Our CMMS Implementation Is Not Going as Planned?

While CMMS implementation is mostly a game of preventive action in regards to failure, that doesn't mean there are no options when an organization's CMMS project is sinking.

1

Scale Back

We already know that one of the biggest problems for CMMS implementation is the speed at which organizations try to convert their entire operation. With this in mind, if a facility's CMMS isn't being adopted by everyone, it's a good idea to take a step back and work out the kinks.

Gather feedback to understand exactly why people don't want to (or don't know how to) adopt the software. Scale back to one area and fix the problems that plague you before moving on. Proving solid implementation in one area is a great way to both gather stakeholder buy-ins and to influence employees to use the system.

2

Gather Feedback

In tandem with the first suggestion, feedback is massively important to CMMS implementation. If a CMMS is failing to get off the ground, people probably aren't using it, don't know about it, or don't like it.

3

Seek Assistance

It's not always fun to ask for help outside a company, but there are tons of useful resources that can help a failing CMMS implementation gain some strength. This is especially true if the people running the implementation don't have the level of maintenance knowledge to keep implementation moving forward.

If you already have a vendor, reach out to them to see what kind of implementation consultations they offer. After all, they're experts in CMMS software, and they know how to switch a facility over. If there's no vendor, or the software is developed in-house, consider seeking exterior consultants to help. This might seem like wasted money, but if they can steer your implementation back onto the right track, their help will have been invaluable.

Leadership Throughout Implementation

More often than not, there's a communication disconnect between the people implementing CMMS software and the people using it.

For instance, a maintenance manager might tell their employees, "Input quality data." While this seems like a simple request, it may not be clear to some employees what quality data means. They might think that good data means lots of data, or that they should input anything and everything they can find. This results in a massive influx of work orders that aren't useful and don't point toward real problems.

In these cases, to help employees understand the implementation of quality data, it's helpful to use examples and meticulously walk through the input process.

Getting an Implementation Team Together

The next step is to get a strong implementation team together. Your team should consist of both management and staff members, but it should also be small in order to make sure the implementation process is handled in a consistent manner.

Generally, the best qualities to look for when choosing members of your implementation team are:



Familiar with technology.



Analytical mindset.



Detail-oriented.



Committed to reliability.



Communication and interpersonal skills.

Familiarity with how your business' processes work, such as maintenance workflows or the way you currently organize data, also helps. In addition, at least one of your team members should be able to help your maintenance crew get on board with using the new system, both in terms of training and in helping them understand how it makes their lives easier.

How to Get Team Buy-In

While most people think about managers when it comes to CMMS buy-in, it's equally important to make sure that your technicians also approve of the CMMS implementation. So, how do you do this?

Highlight Ease of Use

Make sure your team understands exactly how a CMMS will benefit them (like streamlining maintenance tasks by attaching procedure documents to work orders).

Data Tracking Features

Accountability can sometimes be a problem in maintenance work, especially if someone performs an incorrect fix. CMMS software tracks this data, along with other useful things like previous solutions to problems.

Keep Technicians in the Loop

Technicians (or any employee, for that matter) won't want to use a system that they're told to use without any two-way communication. CMMS implementation relies on the people using the system, so plan with them in mind.

Train Continuously

If you work hard to push CMMS software, but no one knows how to use it, the system is dead on arrival. Training is the way you push adoption of a software. Train your technicians on how to use the system, retraining whenever new features arrive or people misuse the software.

Use a Mobile-Enabled System

No technician should have to leave the field to go use a desktop computer. Using a CMMS mobile application allows technicians to perform their jobs effectively and is a great step toward technician buy-in.

Recognize Solid Efforts

CMMS software gives you great data on assets, but it also gives you great data on who your superstar technicians are. Track which technicians proactively fix equipment or solve most of your work orders and recognize these efforts.

Create a Preventive Maintenance Plan with Technician Feedback

Creating a preventive maintenance program from scratch without technician feedback can have an overall negative effect on technician buy-in because the people performing maintenance feel like they have no input. It's important to involve your maintenance team in this planning process; they'll be the ones doing the work, after all.

Foster a Positive Reception

When it comes to any new technology, it's the facility's job to create a positive reception to influence adoption. With this in mind, use this as an opportunity to inform people on how their normal process is changing while highlighting important benefits to their job.



How to Get Management Buy-In



There are many ways to mess up a CMMS implementation, and one way that often gets overlooked is managerial buy-in, despite the fact that this factor is usually seen as one of the most important pieces of implementation. It can be difficult to justify maintenance costs to managers who don't see as much obvious value from a CMMS. This section will show how to get them on board.

The “Crawl, Walk, Run” Mentality

With a new CMMS, it's useful to have a gradual “crawl, walk, run” implementation strategy. This means that you start small with a CMMS, rather than trying to convert an entire facility at the same time.

This strategy accomplishes two important objectives: one, it makes the overall implementation process smoother, allowing you to work through growing pains in a smaller control area. But even more importantly, starting small allows you to demonstrate value to managers, making it easier to bring them on board.



Plan Everything Out

A manager probably doesn't want to hear a half-baked CMMS implementation scheme, but their minds may be more likely to change if your plan is fleshed out.

At the end of the day, a maintenance manager wants to know that their budget is being used effectively. For CMMS implementation, this means that you need to create an in-depth budget plan, as well as an implementation timeline, intended maintenance strategies, planned failure codes, and a host of other elements.

For managers to buy in, they need to understand exactly what they are buying in to, and creating a sort of holistic schematic for your CMMS implementation is a good step toward building that understanding.

Communication Is Key

It's important to remember that "buy-in" is not a static concept. A manager may approve a CMMS, but resist later based on how well they perceive the process to be going. At this stage in the process, it's necessary to constantly communicate status and updates not only to managers, but to everyone involved with CMMS implementation.

This can take many forms. Maybe there's a weekly progress meeting or a series of constantly updated graphs that show implementation percentages by area. It may be necessary to have different meetings with different information depending on manager level – for example, area-level managers probably don't need to see as much of the high-end budget information as facility managers.

Remember: just like a CMMS increases the communication between your assets and maintenance team, you need to keep those same channels open between your team and your managers.

Outline the Benefits of Transitioning From Paper To Digital

Making the significant shift to a CMMS can be daunting for a company that's always handled maintenance requests in the same comfortable and familiar way. However, the potential efficiencies and cost savings are worth making the transformation. According to a 2020 article from McKinsey & Company, embedding digital collaboration into maintenance processes can reduce maintenance-applicable spending (excluding parts, equipment rental, and contractor costs) by 10% to 15%.

But the effects are visible in other KPIs as well:

- **Overall equipment effectiveness (OEE):** reduced downtime increases OEE by 2% to 3%.
- **Wrench time:** the amount of time workers spend performing value-added tasks increases by approximately 5% to 10%.
- **Maintenance cost as a percentage of replacement asset value (RAV):** annual maintenance spend as a percentage of RAV can decrease by approximately 5% to 10%.

Real-Life Implementation Stories

We've talked a lot about what a successful CMMS implementation looks like, but how have other companies found success? To see how this all connects, here are two real-life implementation success stories.

Horizon Global's Three-Phase Implementation

The company began its CMMS implementation by setting up three distinct phases. The first phase involved simply moving all the asset data and anticipated schedules from the manual system into the CMMS. During this time, the company also issued smartphones to team leaders on the shop floor. This allowed all work requests to be centrally approved and assigned.

The second phase revolved around organizing the plant's spare parts to identify areas of highest risk. This is important in the automotive industry because of customer compliance. If a customer is relying on a very important product, and there's only one day of stock, the team needs to make sure they have the right spare parts.

Finally, the third phase involved sharing results, reports, and analysis with the entire team. Horizon Global wanted to be able to show the shop floor workers that a request was received, someone was on the way, and that daily checks had been done. It was important to include the shop floor workers to show that they were part of this, and why it's important to log information.

Rehrig Pacific's Easy Implementation

The company began their implementation with a beta test at its Kansas facility. Once that was completed, next came the national rollout. Rehrig Pacific broke the implementation into three specific phases: workflow management, inventory control, and technician scheduling.

The workflow management piece took the plants a week to inventory all their assets. Then the National Reliability Manager would come in for a week, get all of the data scrubbed, get things like backlogs ready, and then do a mass upload. After that, the National Reliability Manager would spend three or four days really focused on training, as well as appointing a local champion to be the administrator of the system.

Conclusion

While there are many pitfalls your CMMS implementation can fall into, with the right vendor and plan of action, you can make sure that you're not just another negative statistic. By being aware of the general challenges and following best practices, you can make your CMMS implementation a success.

Take the Next Step with UpKeep

Maintenance shouldn't mean guesswork and paperwork. UpKeep makes it simple to see where everything stands, all in one place. That means less guesswork and more time to focus on what matters. Click the button below for a free product tour of the #1 software for maintenance and facilities.

[Free Product Tour](#)

About UpKeep

UpKeep is unlocking the potential of maintenance and facilities teams by offering them the simplest and smartest way to manage their work and collaborate, all from their pocket.

Unlike some clunky, legacy software vendors and DIY solutions, UpKeep was built to give technicians everything they need to manage their work on-the-go, while empowering managers with the insights to make better decisions.



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