

# THE CMMS BUYER'S — GUIDE —



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# Introduction

Selecting a CMMS for your team can be overwhelming. The goal of this Buyer's Guide is to help you navigate the process.

The first CMMS appeared around 1965 and was used by large manufacturers that owned IBM mainframe computers (the beastly kinds that are not used anymore). Technicians would log data on punch cards that were fed to the computer. Years later, they would log data on paper that was given to data entry specialists. Only in the 1980s, when computers became more usable, did technicians log data themselves directly into the system.

Accessibility is now less of an issue in the 21st century with personal computers. And a CMMS is not reserved for large manufacturers that have high maintenance budgets. Today, a CMMS is used by companies that simply have internet in their facility and even the smallest maintenance budgets. This is because CMMS solutions are web-based and relatively affordable. It's important to balance affordability with value for money as part of the evaluation process. We'll cover how to evaluate the value of a CMMS later on.

Accessibility and affordability aside, today, a CMMS is judged mainly on functionality and ease of use. Usability is still an important factor because as more features are added, CMMS solutions can become increasingly complex, which decreases any chance for successful implementation.





# How to Select the Best CMMS for Your Team

## What Should You Look for in a CMMS?

When it's time to select your CMMS, be sure to consider fit within your business, resources required, and the system's growth potential.



### Company Fit

First, be sure your solution fits the needs of your business. If you're a small organization, you may need a simple software solution without all the bells and whistles. On the other hand, if you expect rapid growth, you'll want a CMMS solution that can scale quickly and easily. Larger companies with multiple facilities may require a more sophisticated, proven solution that can easily integrate with other business systems.



### Resources Required

Second, match the resources required with the resources available. The initial cost of a CMMS is important; however, it's critical to consider the ongoing costs such as training, upgrades, or subscription costs. Be sure your organization can follow through with not only purchasing and implementation but the ongoing tasks necessary to maximize the features of the chosen CMMS.



### Potential for Growth

Finally, evaluate the CMMS for its ability to grow with your organization. Cloud-based technology is the future of this software as well as mobile functionality. Be sure your chosen solution provider is ready to help keep you up-to-date in terms of the technology itself.

# Must-Have Features of a CMMS

The most important feature of a CMMS is the effective management of work orders, inventory, vendors, and assets as well as the ability to provide analytics, mobility, and scanning capabilities.



## Work Order Process Management

Work orders can be automatically scheduled, accessed, and tracked through a CMMS, providing both technicians and management a comprehensive record of maintenance work completed and scheduled. In a similar way, a CMMS can help a facility keep track of expensive tools when they are used by multiple technicians, follow inventory through a work process, and manage contractor agreements and payments effectively.



## Reporting

You'll want to make sure your chosen CMMS provides easy-to-read analytics reports, so you can periodically evaluate key performance indicators (KPIs).



## Mobility

In addition, your CMMS should be accessible with mobile technology, so your service technicians have the same information when they're out in the field and can easily record their work and findings right back into the centralized system. Integration of barcoding or RFID scanning technology is also an important CMMS feature, allowing you to quickly and accurately tag and scan assets and inventory data.

# Four CMMS Use Cases

## Does a CMMS Serve Your Use Case?

Here are four examples of how a CMMS can make a difference in reducing costs, improving productivity, and increasing efficiency.

1

### Asset Management

A CMMS doubles as an asset management software and can help a facility better manage its maintenance assets. Some companies may use expensive testing equipment or put together service tool kits for maintenance technicians to take out during service calls. By tagging these kits or assets, a company can keep track of which technician is using what tools, where the equipment is located, and when they might need to be inspected or serviced.

2

### Property Management

Property managers often must keep track of a wide range of maintenance requests from tenants as well as overall maintenance tasks such as landscaping and janitorial services. A CMMS can help prioritize and

3

### Facility Management

Many facilities can benefit from a CMMS by using it as a facility management software to help manage reactive and preventive maintenance on critical assets and equipment. The data collected over time can also help management decide when equipment should be taken out of service and replaced. For example, sophisticated analytics can compare the costs of continued repair and maintenance with the cost and productivity gains of new equipment.

4

### Inventory Management

By keeping track of materials and items from the moment they enter your facility, throughout their journey in your company, and to their final consumption, you can minimize the labor spent in searching for items as well as the cost of replacing lost items. Scanning technology works in tandem with a CMMS to give you an inventory management software, showing accurate and complete information on your inventory.



# Industries That Benefit From a CMMS

## Does a CMMS Serve Your Industry?

A wide variety of industries can benefit from implementing an effective CMMS. Here are some examples of potential applications.



### Manufacturing

Keep your equipment and assets up and running. A CMMS can help manage work orders to increase production uptime and help you keep a closer eye on all your critical assets.



### Facilities

Manage everything from your heating, ventilating, and air conditioning (HVAC) system to landscaping tasks. A CMMS can help you ensure that all those little things that keep your facilities safe, comfortable, and productive are completed.



### Equipment

By tracking all of your equipment and the associated repair history, you can have a firm handle on required reactive and preventive maintenance tasks. Both field technicians and management have the needed transparency to do their jobs more effectively.



### Farming

A CMMS can help manage maintenance requirements on farm equipment and help you make better decisions for when to repair or replace agricultural assets.



### Building

By managing the details required to keep a building up and running, a CMMS can help you streamline potentially time-consuming tasks to save time and money.



## Hospitality

A centralized CMMS can help you serve your customers better by providing rapid response to maintenance issues. In addition, reducing costs and improving things like energy usage can benefit the entire business.



## Property

Tracking and prioritizing tenant maintenance tasks can quickly become overwhelming. A CMMS helps manage all of that by scheduling maintenance tasks automatically and generating work orders that help technicians manage their workdays efficiently.



## Restaurants and Small Businesses

A CMMS can help you streamline all those maintenance items that need to be addressed but are not part of your core business. Spend more time building your dream and less time managing repairs, vendors, and contractors.



## Churches and Nonprofits

Achieve your vision and serve your members by relying on a CMMS to take care of required building and system maintenance easily and effectively.



## Fleet

Schedule preventive maintenance tasks based on mileage, time, or performance to keep your fleet vehicles reliable and running well. Sensors can help trigger CMMS work orders, giving you 24/7 data on your vehicles.



## Schools

Educators and faculty can easily use a CMMS to report needed maintenance requests quickly from a mobile device. Eliminate the need to call the maintenance department and shorten the response time required.



## Cities and Municipalities

Managing everything from landscaping of public buildings to repairing highway signage, our city officials have a lot on their plates. A CMMS can help prioritize and schedule all those tasks to keep our cities safe and pleasant for all.



## Gym and Fitness

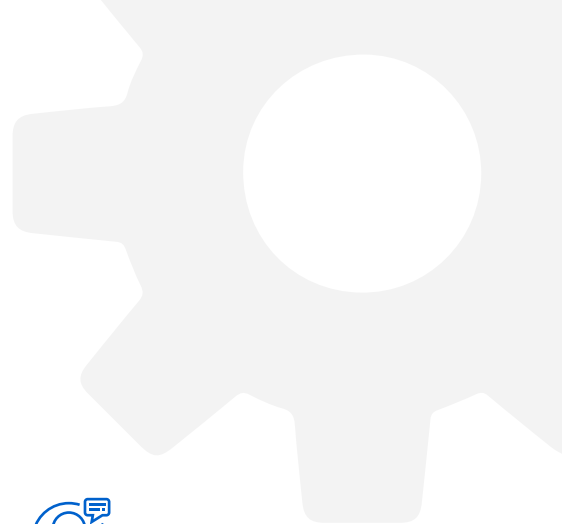
Keep your equipment operating smoothly and safely with a CMMS. A centralized system can not only manage maintenance of gym equipment but can also help you keep supplies and parts well-stocked.








# Comparing CMMS Providers

## Average User Ratings for Maintenance Management Software

Based on all Capterra user reviews as of Q4 2020



CMMS Providers	 Overall	 Functionality	 Ease of Use	 Value for Money	 Customer Support
1 UpKeep (1140)	94	88	92	92	96
2 eMaint (212)	88	88	84	86	90
3 Fiix (502)	88	84	86	88	88
4 Hippo (273)	88	84	88	90	94

As we mentioned earlier, functionality, ease of use, and value for money are all important aspects to consider when selecting a CMMS provider. Customer support should also play a role in the decision-making process.



## Functionality

Functionality sits at the core of any CMMS system and is what ultimately drives home the benefits you will receive. As previously mentioned, work order process management, reporting, and mobility are the three most important features of a CMMS. It's important to find a provider that can confidently deliver on all three.



## Ease of Use

Ease of use and functionality really go hand in hand. The more features that are added, the more complex the CMMS can become. This can decrease the chance for successful implementation and is the main reason why legacy CMMS systems often see low adoption amongst technicians. It's important to find a CMMS that has a high rating on both functionality and ease of use.



## Value for Money

It's important to strike the right balance between cost and value as part of the evaluation process. Choosing the outright cheapest option may leave you lacking key features and put adoption at risk. Choosing the most expensive option may put your potential for a positive return on investment (ROI) at risk if your costs outweigh your potential benefits. We help you break down

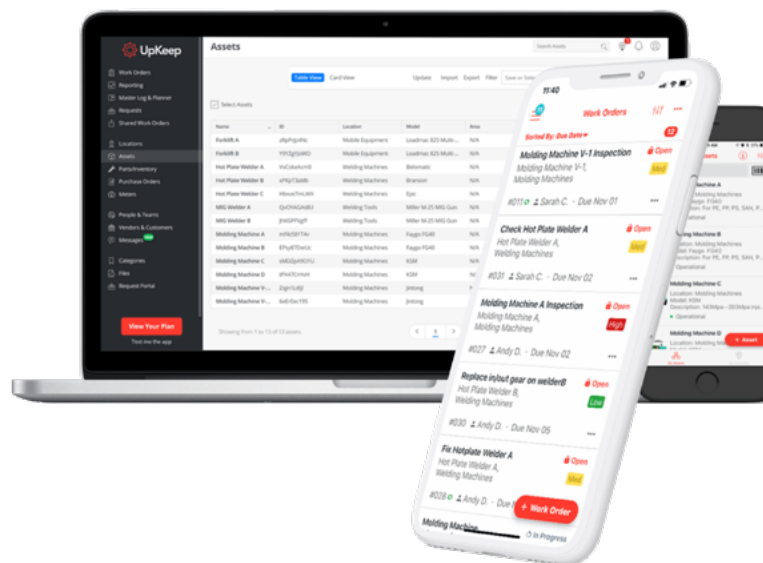
how to effectively calculate a potential ROI and value of a CMMS in the next section.



## Customer Support

Implementing and onboarding a CMMS costs time and money, so you want to be sure that your CMMS provider will be providing you the ongoing support you need to ensure your implementation is a successful one.

There are many software review websites out there that can help you compare vendors and browse reviews from current CMMS customers and users. Capterra (image shown above), G2, and Software Advice are a few examples of these kinds of websites.



# Comparing CMMS Providers Worksheet

**Current vendor:**

**Vendor A:**

**Vendor B:**

**Vendor C:**

	Current Vendor	Vendor			If YES	If NO
		A	B	C		
Does the CMMS deliver on work order process management, reporting, and mobility?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Functionality sits at the core of any CMMS system and is what ultimately drives home the benefits you will receive.	Work order process management, reporting, and mobility are the three most important features of a CMMS. It's important to find a provider that can confidently deliver on all three.
Does the CMMS have a high rating on both functionality and ease of use?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ease of use and functionality really go hand in hand. The more features that are added, the more complex the CMMS can become.	A complex CMMS can decrease the chance for successful implementation and is the main reason why legacy CMMS systems often see low adoption amongst technicians.
Does the CMMS strike the right balance between cost and value?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	We help you break down how to effectively calculate a potential ROI and value of a CMMS further in the next section.	Choosing the cheapest option may leave you lacking key features and put adoption at risk. Choosing the most expensive option may put your potential for a positive ROI at risk if your costs outweigh the potential benefits.
Does the vendor provide ongoing support to ensure your implementation is a successful one?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	There are many software review websites out there that can help you browse reviews from current CMMS customers and users. Capterra, G2, and Software Advice are a few examples of these kinds of websites.	Implementing and onboarding a CMMS costs time and money, so you want to be sure that the provider will be setting you up for success.

# How to Sell a CMMS to Your Boss

In business, we always have to justify the cost of every purchase, whether that's buying a new piece of equipment, hiring that additional headcount, or in this case, purchasing software for your maintenance team. It can be one of the most difficult conversations with your boss, but done right, it makes the decision-making process so much easier.

So, **how do you justify the cost of a CMMS to your boss?**

## How to Calculate CMMS ROI

The formula for CMMS ROI is simple: **(CMMS value - CMMS cost) / CMMS cost**

According to this equation, you need two numbers to calculate the ROI for a CMMS: the cost of a CMMS and the value of a CMMS.

## 3 Examples of CMMS ROI

If you don't have time to perform the exercise of determining the full ROI of a CMMS, you can cite findings from the following studies. In each case, the ROI of a CMMS is correlated with the ROI of preventive maintenance since the CMMS can put preventive maintenance tasks on autopilot.

1

A company can save **12% to 18%** of the costs normally associated with repair costs and reactive maintenance when it uses preventive maintenance (U.S. Department of Energy).

2

Over a 20-year period, a company can receive an ROI of **545%** by switching from reactive to preventive maintenance (Jones Lang LaSalle).

3

Reactive plants typically achieve uptime of around **83.5%**. Plants that focus on planning & scheduling, preventive maintenance, and defect elimination achieve **98%** uptime (Reliability Incident Management).

## How a CMMS Increases Technician Productivity

In addition to finding relevant studies to cite, you can quickly calculate the ROI of a CMMS based on how it increases the productivity of technicians.

We conducted a study with 1,000 customers that provided data about how productivity increases when an antiquated maintenance system is replaced with a mobile CMMS.

Here's what we found:

- **Paper and pencil to mobile CMMS = 21% increase in technician productivity**
- **Desktop CMMS to mobile CMMS = 12% increase in technician productivity**

To assign a dollar amount to this increase in productivity, you need two more numbers: the average hourly wage of technicians and the amount of technicians on your maintenance team.

For example, let's say you pay your technicians \$30 an hour on average and are moving from a paper-based system to a mobile CMMS. In addition, you have eight technicians on your maintenance team and are paying \$5,000 a year for the CMMS.

The annual ROI of the CMMS based on technician productivity would be:

$$\{[\$30/\text{hour} * 8 \text{ working hours/day} * 261 \text{ working days/year} * 8 \text{ technicians} * 21\% \text{ productivity}] - \$5,000/\text{year}\} / \$5,000/\text{year} = \mathbf{2,000\% \text{ ROI}}$$

When you have these numbers, plug them into this equation:

$$\{[(\text{average hourly salary of technicians}) * (\text{working hours per day}) * (\text{working days per year}) * (\# \text{ of technicians}) * (\% \text{ productivity increase})] - (\text{CMMS annual cost})\} / \text{CMMS annual cost} = \text{Annual ROI of CMMS based on technician productivity}$$



## Determine the Value of a CMMS

In addition to calculating the value of increasing the productivity of technicians, you can factor in other areas of value as well:



### Estimate Administrative Productivity

Perform a similar calculation as you did for technicians above. But instead of using the same productivity percentages that you did for technicians, estimate the productivity for admins. When making this estimation, consider the time saved from removing paper and keeping data in a centralized, searchable system.



### Estimate Storeroom Productivity

If you have a storeroom that's managed by a parts manager, estimate an increase in productivity based on how much easier it will be for them to keep proper stock counts. For instance, when a technician adds a part to a work order, the quantity used is automatically deducted from inventory.



### Estimate the Cost of Failing Audits

Companies in some industries are audited by the government for preventive maintenance processes. If the company can't provide documentation that it's maintaining equipment, the company is fined. With a CMMS, you can access preventive maintenance checklists, schedules, and historical maintenance records for assets in a few clicks. You can also generate reports/documentation in PDF format to give to auditors. Having a preventive maintenance program as well as a system for keeping it in order will protect companies from failing government audits.

# How to Calculate the True Cost of a CMMS

There are four primary costs to consider before purchasing a CMMS:



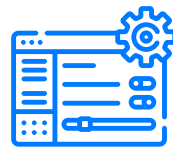
**Cost of licenses**



**Cost of implementation**



**Cost of mobile devices**



**Cost of onboarding**

## 1

### Cost of licenses

To find the cost of licenses, go to the pricing page of the CMMS provider.

You'll find that many providers charge per user.

We define a user as anyone who needs to create and update work orders or run reports. These are usually technicians, administrators, and managers. People who need request-only or view-only access get free licenses.





2

## Cost of implementation

The cost of implementation can cost time or money upfront. For instance, if you have thousands of assets and need help importing them to the CMMS, the provider will offer this service for a fee. They can also help you organize your system for future success. Smaller companies, however, can usually do this on their own with tutorials and support that is included with the original plan.

In either case, time is required for implementation. Based on your team size and maintenance responsibilities, the CMMS provider can ballpark how long it will take to implement. You can then multiply this by the hourly wage of people who will be setting up the software.

3

## Cost of onboarding

The cost of onboarding is time-based. The question you need to answer is: How many combined hours will it take to onboard our technicians and team to the software? With this

4

## Cost of mobile devices

Finally, there is the cost of mobile devices. This includes tablets and smartphones you'll need to acquire to leverage the mobile functionality of the CMMS.

For instance, if you have a large plant, you might install tablets throughout the facility, so operators can quickly submit work requests when machines go down. Additionally, you might purchase smartphones for technicians or reimburse them for using their personal smartphones to log maintenance activity with the CMMS mobile app.

## How to Appeal to Common Stakeholders

Prior to selecting a CMMS, everyone involved in the decision-making process needs to be on board. Having the approval of managers, maintenance teams, and other key stakeholders is essential for a smooth launch.

Effectively presenting data on how a CMMS can benefit an organization is the first step in getting team support. Here are some common stakeholders, and how they could benefit from a CMMS.



**Executive:** A CMMS will help you serve your customers better. Better data means faster, smarter business decisions. That results in prompt service, faster shipment, and more responsive problem resolution. All of those things will help you improve your relationships with your customers.



**Facility Manager:** A CMMS can optimize team performance with live reporting. Facility managers are then able to easily identify bottlenecks and inefficiencies, while also making better resource allocation decisions.



**Maintenance Director or Manager:** One of their major responsibilities is setting overall maintenance department goals, strategies, or procedures to accomplish company objectives. With a CMMS, they're able to easily track important key performance indicators to achieve objectives.



**Maintenance Planner or Scheduler:** Because a CMMS collects and manages maintenance information centrally, companies can operate more efficiently. For example, a worker can enter preventive maintenance schedules into a CMMS once. When time or condition requirements are met, the CMMS can automatically trigger a work order, so that maintenance is performed on time.



**Maintenance Coordinator:** One frustrating thing for workers is not having the correct tools or supplies to complete a job. A CMMS not only manages work orders, but also can provide tracking and ordering of tools and supplies. In addition, the system can help one locate and track supplies and tools, minimizing lost items and unnecessary reorders.



**Maintenance Technician:** Gone are the days of sticky notes, emails, and voicemails to pass along maintenance details. A CMMS helps put all this communication in one place, so that all who require data will have it at their fingertips.

# Conclusion

A CMMS helps teams organize maintenance tasks and track maintenance activity. There are also CMMS products available that are free to use; however, many maintenance teams are still using pen and paper, spreadsheets, or no system at all according to an UpKeep survey.

There's always a positive ROI for a CMMS if your company does two things: 1. performs a significant amount of maintenance and 2. takes the time to properly implement the software and onboard staff. But you have to quantify this to prove to yourself, and others, that the investment is worth it. By following the steps above, you can do this. And after you do this, you'll start experiencing the incredible ROI of a CMMS.

With CMMS products easier than ever to use and widely available to teams with different budgets, it's at least worth testing a CMMS.

## 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. There's a reason UpKeep has more 5-star reviews than any other CMMS and maintenance software vendor. Click [here](#) for a free product tour of the #1 software for maintenance and facilities.

[Free Product Tour](#)

### About UpKeep

UpKeep was founded in 2015 by our CEO, Ryan Chan. The CMMS he used while working as a process development engineer in a manufacturing plant was too complicated, so he learned how to code and created the first version of UpKeep.

Today, UpKeep is a team of 100+ people from around the world who are dedicated to making maintenance software easier to use and adopt.

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