SETTING YOUR MAINTENANCE PROGRAM UP FOR SUCCESS

A Step-By-Step Guide For Installing and Optimizing Your CMMS

Installing and optimizing a computerized maintenance management system (CMMS) is a significant investment. But if your CMMS isn't optimized, you aren't getting your money's worth.

An optimized CMMS is the key to boosting your maintenance program's efficiency and accuracy—while failure to optimize results in lost opportunities to save time and money.

In this guide, you'll find a step-by-step process for optimizing your CMMS and setting your maintenance program up for success. But first, let's review the basics.

WHY YOU NEED AN OPTIMIZED CMMS

As a facilities professional, you're responsible for making sure the facilities you manage meet the needs of the people who live and work in them.

Whether you're dispatching work orders, managing preventive maintenance schedules, or forecasting future asset costs, maintaining facilities is complex.

You need an efficient, cost-effective way to manage them. Enter a CMMS.

Benefits of an optimized CMMS:

- Reduced administrative time
- Improved labor efficiency
- Predictive labor model
- Predictive equipment replacement
- KPIs for program improvement
- Metrics for annual business review

Learn more about the benefits of an optimized CMMS here >

THE PATH TO CMMS OPTIMIZATION

You don't have to work tirelessly optimizing your CMMS for a year before you see any direct benefits. By following this progressive process, you'll see benefits every step of the way.

STEP 1
Create an accurate, prioritized asset inventory

At the core of any well-functioning CMMS is an accurate, prioritized asset inventory for the preventive maintenance (PM) program.

Many inventories contain outdated equipment and fail to include new equipment from expansions or renovations. They also don't prioritize equipment such as air handling units or life safety equipment that are mission-critical for a building's successful operation and function.

Importing inaccurate, poorly labeled inventory into a new CMMS platform is a common mistake. And the best software available will still generate work orders for ghost or unlabeled equipment with poor information.

It's critical you get your staff's input on equipment status and set aside time to update and properly label it. Every CMMS needs a designated mission-critical (or priority one) equipment inventory as the basis for improved metrics and efficiency, as well as compliance verification for certain industries.

This key equipment then acts as the baseline for your staff's schedule—informing which work orders must be completed each month to ensure business continuity. From there, you can move on to priority two- and three-level equipment based on needs and history.

STEP 2
Establish accurate and consistent PM tasks and schedules
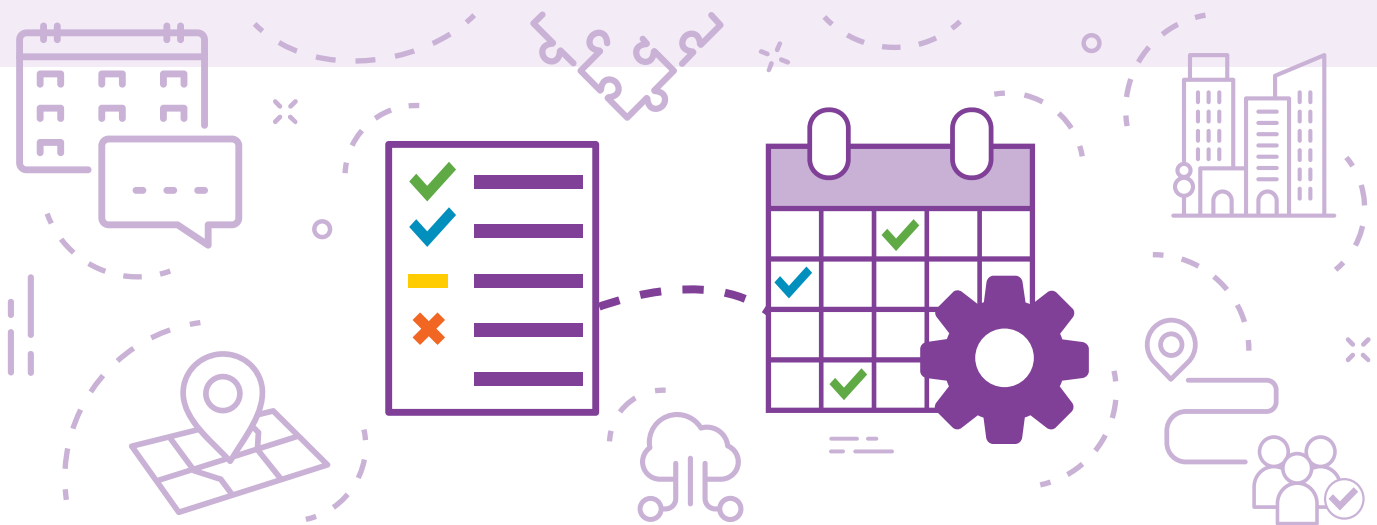
One of the primary purposes of a CMMS is to ensure equipment maintenance schedules are followed by generating regular preventive work orders for staff.

In combination with reviewing maintenance schedules and task descriptions, these work orders not only help demonstrate compliance but also improve group efficiency and provide the foundation for several key performance indicators.

Starting with your priority one-level asset inventory, review the manufacturers' recommended maintenance schedules and corresponding checklists to create your preventive maintenance schedules. As you do so, we recommend distributing your quarterly and semi-annual maintenance orders so they aren't all generated on the same days.

Over time, as you make a first pass through the required maintenance schedules, make a point to update the actual amount of wrench time required for each PM work order.

As your technicians perform the maintenance described in task descriptions and checklists, be sure to incorporate their feedback and take steps to update the CMMS where needed.

With newly reviewed and updated equipment maintenance schedules and task descriptions, your CMMS will enable you to accurately forecast the amount of labor time required to perform different preventive maintenance priorities and demonstrate your core maintenance effectiveness with your asset inventory.

STEP 3
Set corrective maintenance priorities

As on-time completion of preventive maintenance is a measure of how well your group maintains equipment, corrective maintenance (CM) response is a measure of how well the group supports its customers or staff.

We commonly see CM work orders entered with the same priority and default target date. The result is a lot of missed targets (and therefore poor statistics) or a lot of editing required to straighten things out.

Evaluate your CM work orders and develop a prioritization system. Models are available, and your software vendor should be able to help you make this an intuitive process for staff and occupants.

Similar to PM work orders, you don't want to set the same timing expectations for responding to an issue affecting life safety as you do installing a new whiteboard. And you don't want to generate performance metrics that penalize your department for prioritizing emergency work and missing low priority estimated deadlines.

Consider setting three to four work order priority levels with default response times ranging from mere hours for life safety issues to 30 days or more for less urgent priority types.

This sets up an additional key performance indicator and efficiency improvement tool as you review the entire workflow from initial request to closeout.
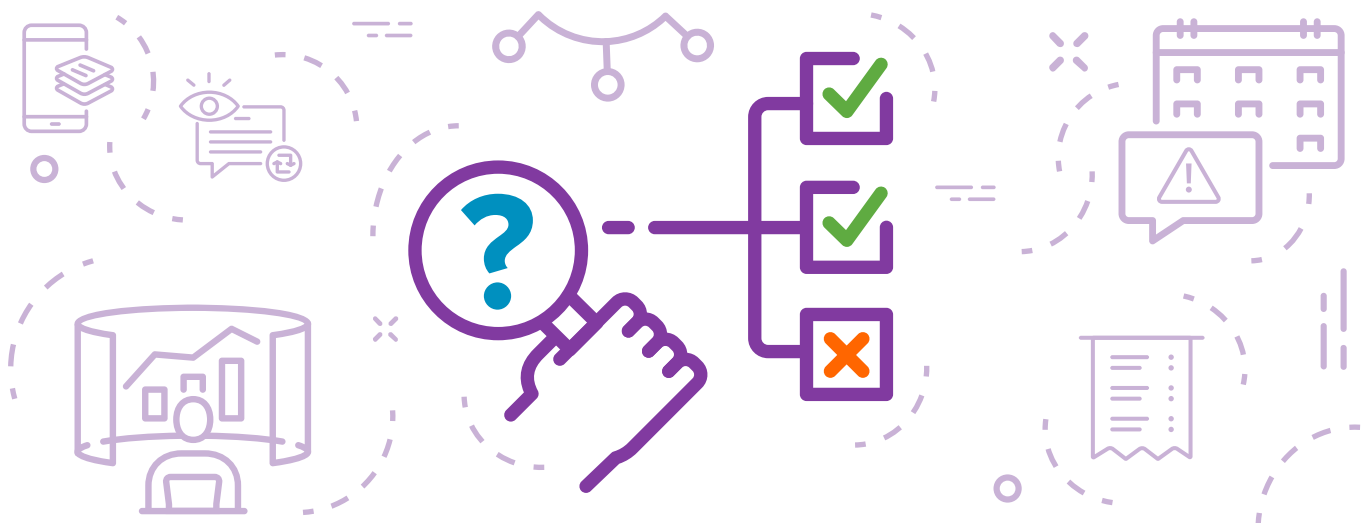
STEP 4
Review process workflows and opportunities

There are numerous methods for implementing an effective, efficient CM process, but the best method depends on your individual staff and program needs.

At the outset, consider the CM process as a workflow. Then, create a workflow diagram and walk through each step (with staff input) to identify opportunities for improved data collection and efficiency.

Begin with data input and consider how your clients—or building staff—enter work orders. Do they use a web-based work request interface, or do they call your facility group directly? How much additional information does your staff add to the request before generating a work order?

From there, examine how work is assigned, tracked, and completed, and whether requesters provide feedback via maintenance surveys built into your CMMS.

Your objective should always be to streamline your work order process. This goal must be achieved in stages by removing non-value-add steps to minimize the number of touchpoints where manual intervention is required before the process continues.

STEP 5
Use mobile devices to improve efficiency

The effective use of mobile devices by facilities staff can significantly improve program efficiency and technician productivity. However, there are challenges to rolling out a mobile solution successfully.

Effective use of mobile is vastly improved by going through the workflow process, as it allows the vendor or consultant to tune it to best meet your staff's needs.

Mobile devices provide those in the field with the most efficient way to track, update and respond to existing or incoming work orders without frequent visits to the office. They also provide the most accurate geo-location and time-tracking data collection.

The secret to successful mobile device use is staff involvement throughout the planning process, a thorough training process with multiple feedback sessions, and—most importantly—a timely response plan for technicians to address any use issues before they become a permanent barrier.

STEP 6
Identify, track, and report key performance indicators

Without accurate performance data, it is extremely difficult to make and measure program changes. Accurate data will make you confident in your own decisions and in your program representation to your company or institutional administrators.

Once you identify the metrics you'd like to track, prioritize them and work with your software vendor to break down the necessary data components to determine what information you must collect and the potential accuracy and reliability of those metrics. This will help you gain a sense of the process (or processes) for generating your key performance metrics.

While this step may be the most time-intensive, it's often the most valuable in improving overall group performance and gaining an internal reputation for efficiency and transparency. It also ensures you have all the information you need to thoroughly evaluate your CMMS and determine its viability when tracing your key metrics.

If you take the time to systematically improve the quality and accuracy of data contained in your CMMS, it will markedly improve your ability to get the information you need for program improvement.

AN OPTIMIZED CMMS IS CRITICAL FOR MAINTENANCE PROGRAM SUCCESS

In addition to boosting the efficiency and accuracy of your maintenance program, an optimized CMMS significantly reduces the cost of your operations by decreasing equipment downtime, increasing the life of your assets, lowering repair costs and improving your ability to predict and prepare for future expenses.

Optimizing your CMMS ensures it will serve your needs for years to come. But it doesn't have to happen all at once. Each step takes you closer to getting the tools and insights you need to proactively serve facility owners and users now and in the future.

Want to see what an optimized CMMS can do for your organization?

Contact us for a personalized demo today.

Wizard Software delivers solutions that are simple to use, with powerful feature sets, yet flexible enough to be tailored to the specific needs of capital project managers, facility managers, and lease administrators.

At Wizard, we understand the unique challenges facilities managers face. And we have helped many of the largest corporations, manufacturers, universities, and healthcare systems simplify and optimize asset maintenance and work order tracking. We're confident we can do the same for you.