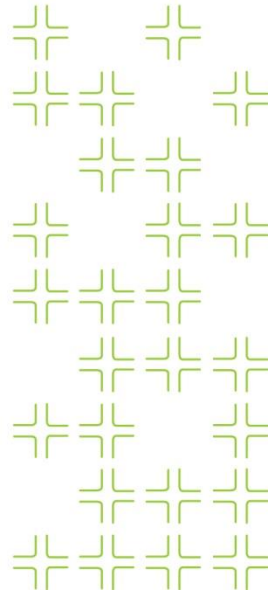




Implementation Success

## Implementation Defined:

- The post-sales process of guiding a client from the purchase to the use of the software they've purchased.



# Implementation 1

## The Theory

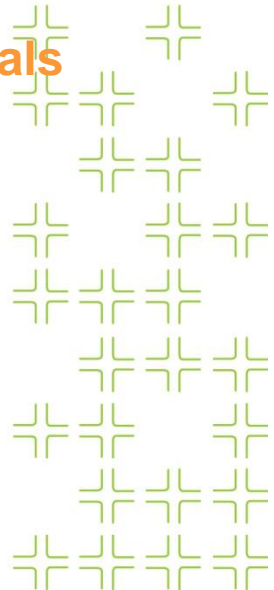
- The Promises of CMMS
- The Implementation Process
- Roles & Responsibilities
- The Philosophy of CMMS

## The Practice

- Costs of Implementation
- Barriers to Successful Implementation
  - Resistance to Change & Rejection
  - Falling Short of the Goals
  - “Feeding the Monster”

## Remedies

- Effective Training
- Continuing Improvement



## Project Management

- Team Players:
  - Roles & Responsibilities
- The Process
- The Philosophy of CMMS

## CMMS

- Set Goals
- Set Expectations

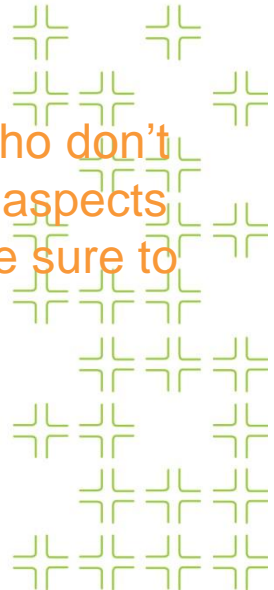
## Project Management

- The Team
- The process (A.D.C.D.O.)

## Barriers

## Keys to Success

- “Beware! Beware! Leaders who don’t attend to the implementation aspects of their strategic initiatives are sure to have a weak ROI.”



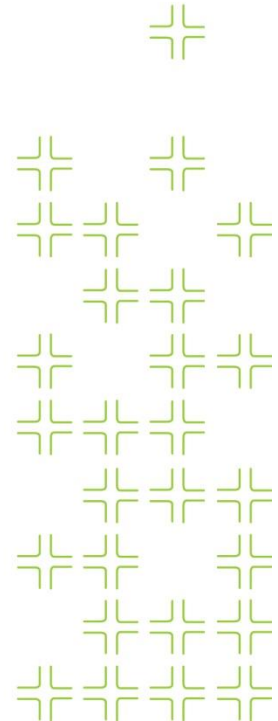
# Implementation Goals

## Improved Efficiencies:

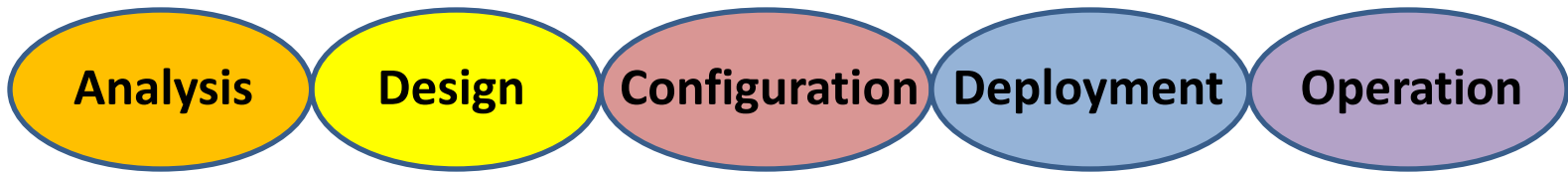
- Asset Management
- Work Management

- **Key Performance Indicators:**
  - Critical equipment availability
  - Mean time between failures (MTBF)
  - Maintenance backlog
  - Equipment downtime
- Criticality
- Cost Analysis
- Trend Analysis

- Scheduled Preventative Maintenance
- Maintenance Cost Tracking
- Automated & Advanced Reporting
- Systems Integrations
- Organizational Communications
- Process Improvement



# Implementation Process



Knowing what you need to do

Determine how to do it with new tools

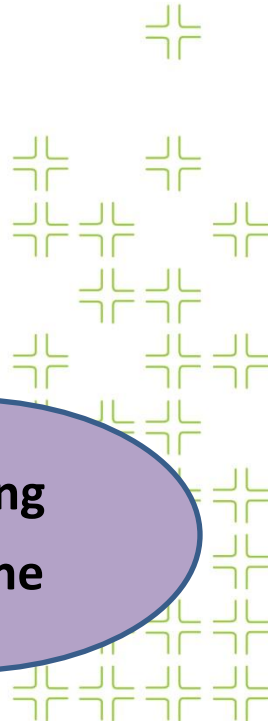
Adapting the New Tools

Adopting the New Tools

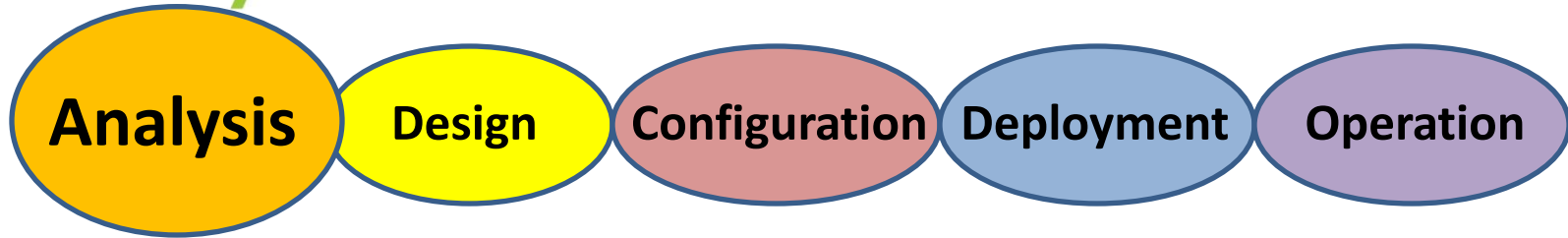
Getting it Done

## 5 Stages of Implementation

- This could be a 'formal' or 'informal' process
- These could be applied in a phased approach, department-by-department or process-by-process



# Implementation Process



## Analysis = Preliminary Knowledge Transfer

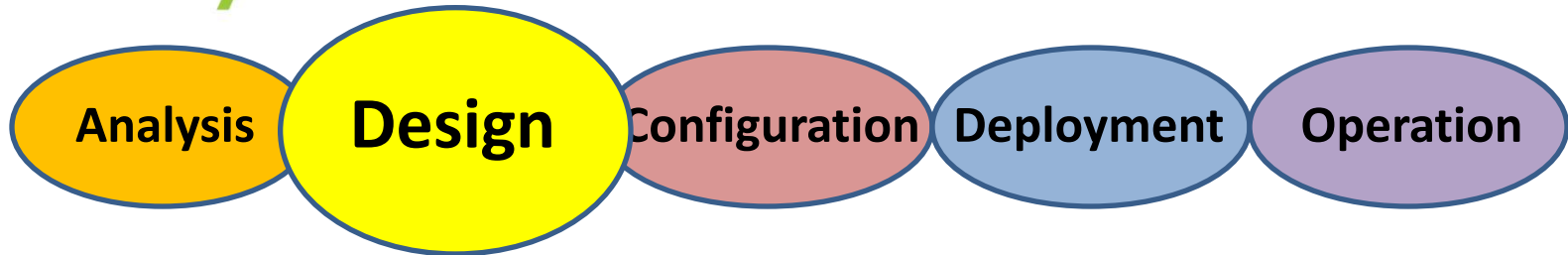
- Sales Transfer to Implementation
  - ‘Diagnostic’ (RFP, sales & purchasing) chore results in a Scope Of Work.
- Kickoff Meeting on-site:
  - Identify Goals
  - Comprehensive Product Overview
    - Lucity demo & discussion
    - Discussion of hardware/network requirements
  - Evaluate current client business processes... the ‘general’ work flow within an organization
    - “Codify” work into Lucity’s Work Flow Setup codes
  - Understand goals of CMMS and needed output – begin with the end in mind



**Knowing what  
you need to do**


*Nothing decided here is written in stone*

# Implementation Process



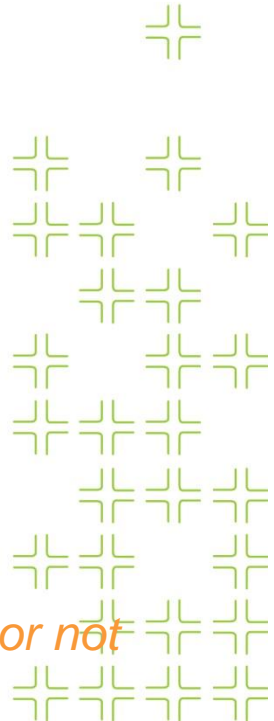
## Design = Identifying Means of Managing Process Requirements

- Design Specifications vs. Existing Tools
  - Auto-Notifications
  - Specialized filter functionality
    - Spring clean-up & other special processes
    - Filters for 'informal' work routing
  - Formal Work Routing
- Custom Integration Design
- Identify weaknesses in existing client data
- Keep the end goals and needs in mind

A yellow oval with a blue border containing the text "Knowing how to do it with the new tools".

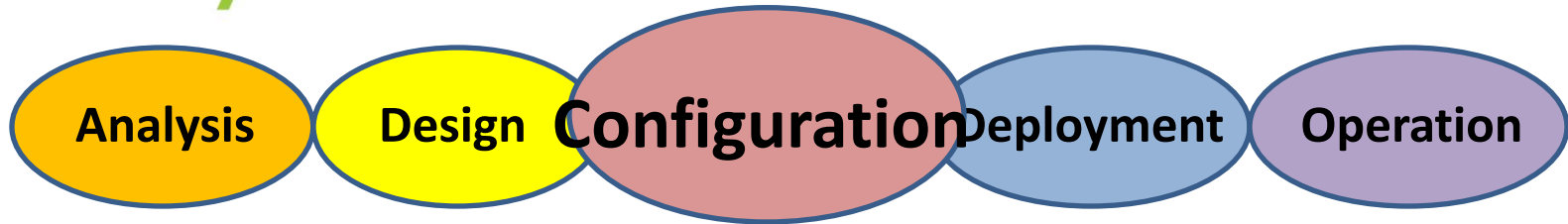
**Knowing how to  
do it with the  
new tools**

*Design process may be formalized or not*





# Implementation Process



## Configuration = Application of What's Been Learned

- Software Installation
- Data Migration
  - Improve existing data first (if necessary and possible)
  - Convert existing Data – iterative process of re-conversion & review
  - Schedule data load upon final approval
- Software Configuration
  - Administrative training (Lucity Web, GIS admin, etc.)
  - Configuration by both Implementer & Client Admin(s)
  - Typical chores: Security, Dashboards
  - Configure with end goals in mind

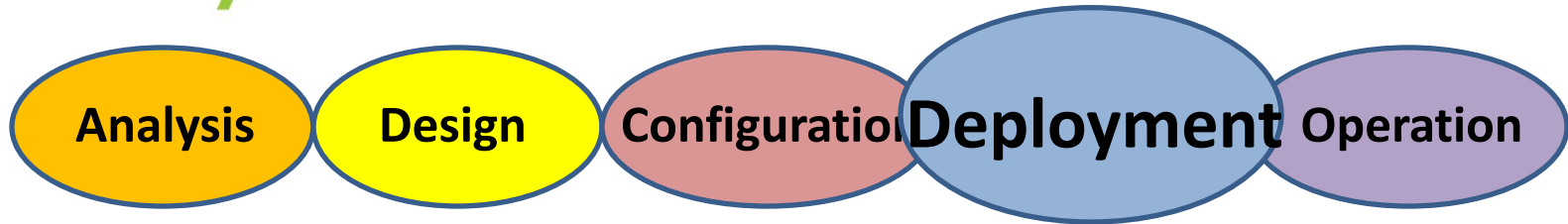
A red oval callout box containing the text "Adapting the New Tools" in bold black font. A small green cross symbol is located to the right of the oval.

**Adapting the New Tools**

*The devil is in the details*

A decorative pattern of green cross symbols arranged in a grid-like fashion, primarily located in the bottom right corner of the slide.

# Implementation Process



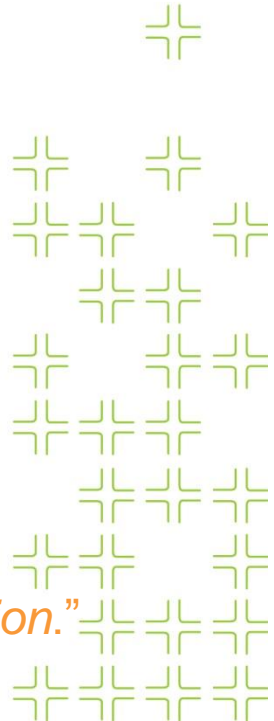
## Deployment = Change Management

- Testing the New System
  - Are we achieving our goals?
- Tweaking the New System
- Transition to the New System → Go-Live
  - End-User Training
  - Schedule for Launch
    - Final Data Migration
    - Launch Support
  - Follow-up Training & Ongoing End-User Support

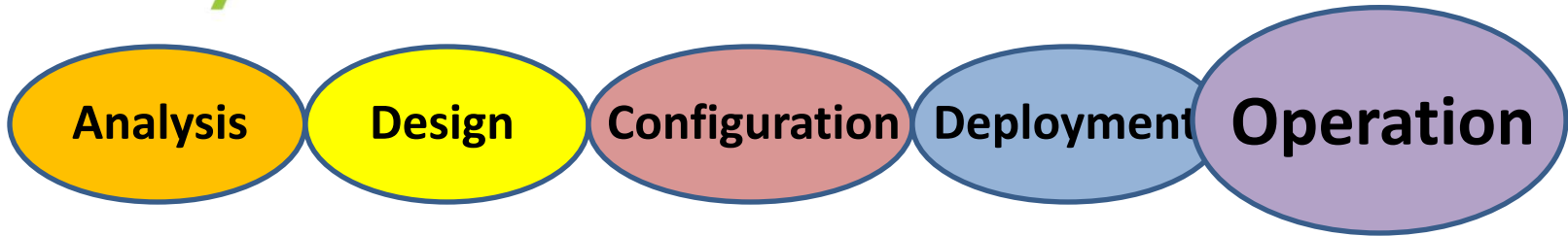
A blue oval containing the text "Adopting the New Tools" in bold black font.

*"Nothing diminishes anxiety faster than action."*

-Walter Anderson



# Implementation Process



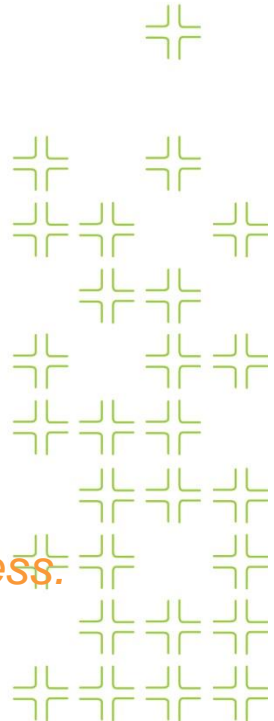
## Operation = Using of New Tools

- After Launch Effort
  - Observe & Guide System Usage
  - Provide Users Feedback & Support
- Capitalize on CMMS:
  - Maintenance Reporting (KPIs)
  - Asset Reporting (Cost Analysis)

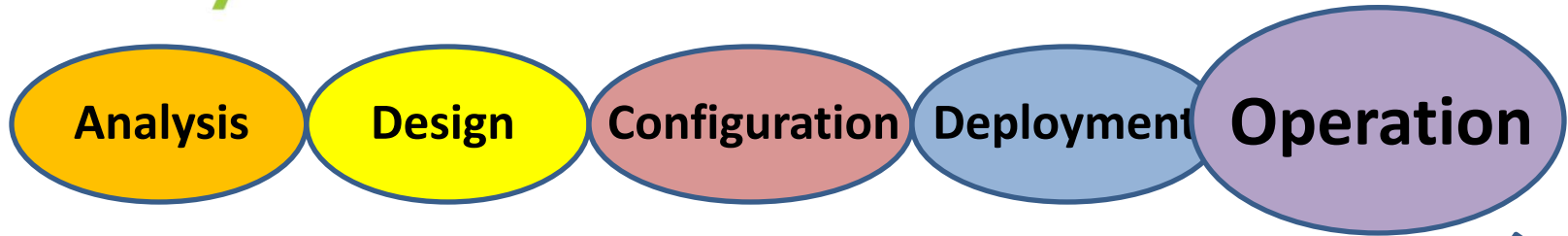


*"Coming together is a beginning. Keeping together is progress.  
Working together is success."*

- Henry Ford



# Implementation Process

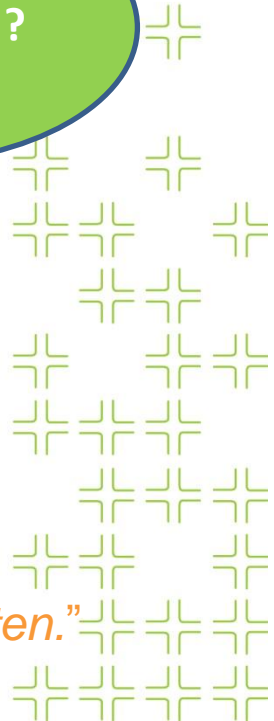


## Operation = Using of New Tools

- After Launch Effort
  - Observe & Guide System Usage
  - Provide Users Feedback & Support
- Capitalize on CMMS:
  - Maintenance Reporting (KPIs)
  - Asset Reporting (Cost Analysis)
  - **Process Improvement = Ongoing Analysis**

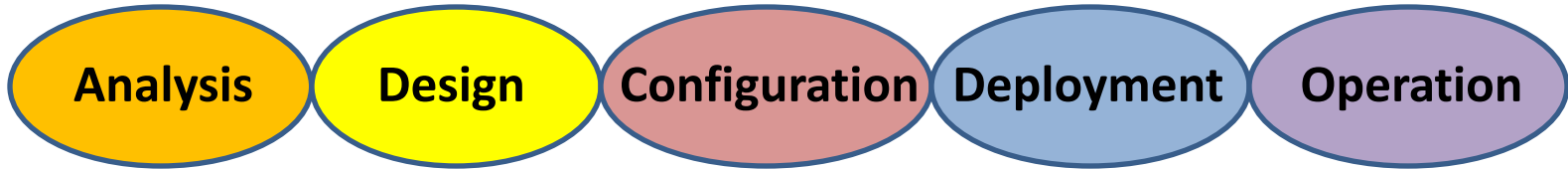
*"To improve is to change; to be perfect is to change often."*

- Churchill





# Implementation Process



## Nitty-Gritty... Project Plans

Lucity Task Tracker v1.0.xlsx - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins Foxit PDF

Clipboard Font Alignment Number Styles Cells Editing

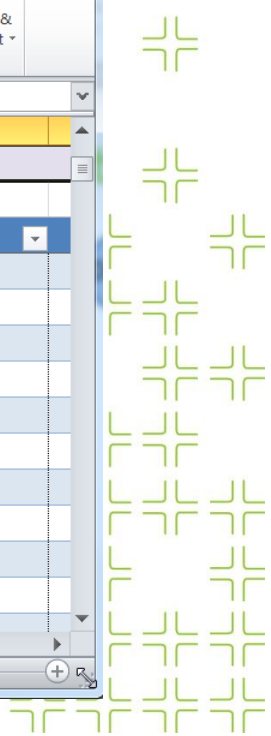
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Lucity CMMS Implementation Task Tracker

Lucity CMMS Implementation Task Tracker			
Update: 10/6/2015		Version: 1.0	
Group	Chore	Task / Issue	Responsibility
<b>DEPARTMENTAL KICKOFF MEETINGS</b>			
Dept1	Department Meeting	Coordinate Department1 Meeting	Team + C_Supr
Dept1	Data Sourcing	Source Additional Data	Team + C_Supr
Dept1	Department Meeting	Determine Core Business Processes	Team + C_Supr
Dept1	Department Meeting	Determine high-level goals (KPIs, reporting needs, etc.)	Team + C_Supr
Dept1	Data Sourcing	Source PMs (legacy data, manual spreadsheet, etc.)	
Dept1	Software Configuration	PM Training - identify appropriate PM 'mode' (Grouped, etc.)	
Dept1	Software Configuration	Configure PMs (identify Tasks, Frequency, etc.)	
Dept1	Data Conversion	Load PMs to Lucity	

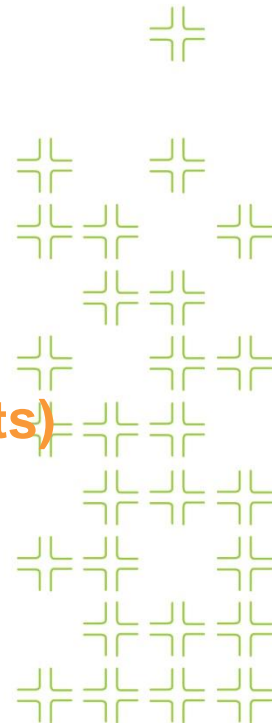
Roles & Responsibilities | Action Item Worksheet

Ready 100%



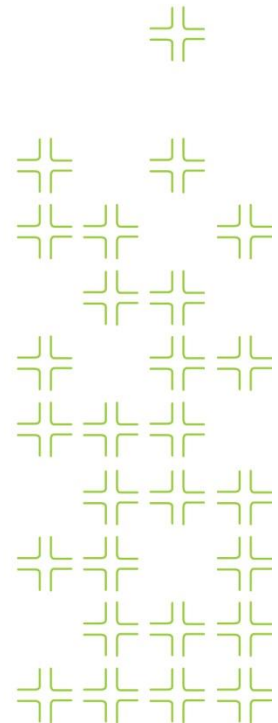
## Implementation Team

- **Implementer & Implementation Support**
- **Client Project Manager**
- **CMMS Champion**
- **Internal Trainer**
- **CMMS Administrator**
- **IT Administrator**
- **GIS Admin (GIS Support)**
- **Departmental Representatives (and Subject Matter Experts)**
- **Director (or organizational representative)**



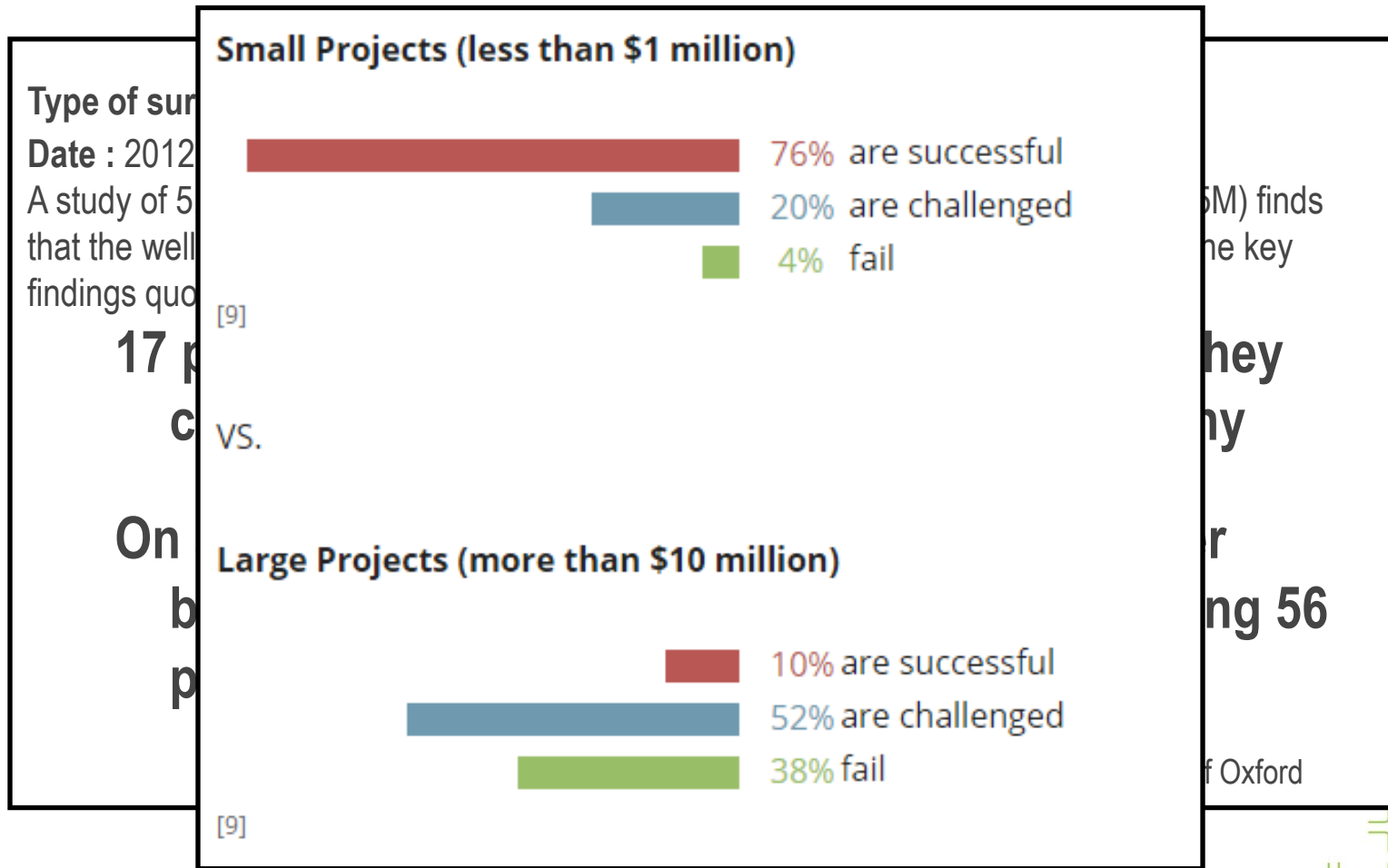
## NO 'Typical' Implementation:

- **Client Variability**
  - **Goals**
  - **Roles (Personnel)**
- **Moving Targets**
  - **Clients & Industry**
  - **Software (& best practices)**



# Barriers to Success

**“Approximately 70% of all CMMS implementations fail”**  
 - statistic from the internet



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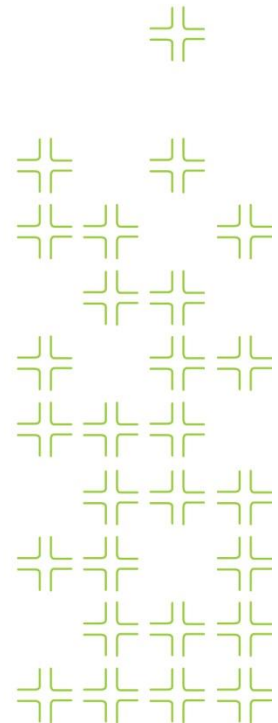
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## Most Common Causes of Project Failure (Project Management software):

- Changing priorities within organization – **40%**
- Inaccurate requirements – **38%**
- Change in project objectives – **35%**
- Undefined risks/opportunities – **30%**
- Poor communication – **30%**
- Undefined project goals – **30%**
- Inadequate sponsor support – **29%**
- Inaccurate task time estimate – **27%**
- Poor change management – **25%**
- Inadequate resource forecasting – **23%**
- Inexperienced project manager – **20%**
- Limited resources – **20%**
- Procrastination within team – **13%**
- Other – **9%**



# Barriers to Success

“Approximately 70% of all CMMS implementations fail”

- statistic from the

- Scope
- Unrealistic
- Costs of Implementation
- Lack of User Engagement
- Reconciling
- Reconciling

## Implementation Goals

**Admin Reporting**

**Resource Availability Checking**

**Public Notifications**

**Authorities Reporting**

**Streamlined Year-End Reporting**

- Performance Indicators
- Critical equipment availability
- Mean time between failures (MTBF)
- Maintenance backlog
- Equipment downtime
- Criticality
- Cost Analysis
- Trend Analysis

**Call-Center Implementation & Dispatch**

**Inventory Management**

**Modelling**

**Time Management**

**More Departments**

**Interdepartmental Coordination & Standardization**

- Maintenance Cost Tracking
- Automated & Advanced Reporting
- Systems Integrations
- Organizational Communications Improvement

**Additional Data Sources**

**Best Management Practices**

**Accountability Reporting**

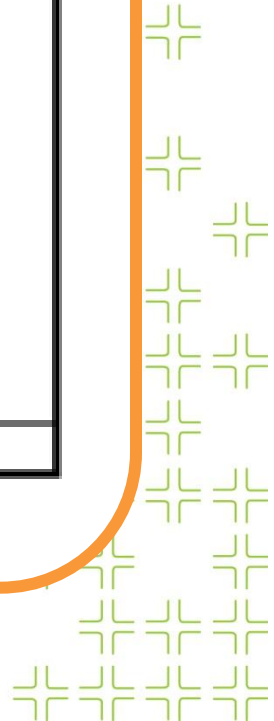


“Approximately 70% of all CMMS implementations fail”  
- statistic from the internet

“The Devil is in the Details”

Communication is Key

- Example: Trade-Offs in Data Capture:
  - Inspections vs. Work Orders



# Barriers to Success

**“Approximately 70% of all CMMS implementations fail”**  
- statistic from the internet

## Implementation Roles

- Scope Creep (changing Goals)
- Uncommunicating stakeholders

### Lucity Side (Implementer):

- Project Management
- Management Consulting
- Data Conversion
- System Configuration
- Integrations Coordinator
- IT Administrator
- Trainer

### Client Side

- Client Project Manager
- CMMS Champion
- Software Administrator
- IT Administrator
- GIS Admin (GIS Support)
- Departmental Representatives (and Subject Matter Experts)
- Director (or organizational representative)
- Internal Trainer



**“Approximately 70% of all CMMS implementations fail”**

• **Resistance to Change:**

- ***He who rejects change is the architect of decay.***

- Harold Wilson

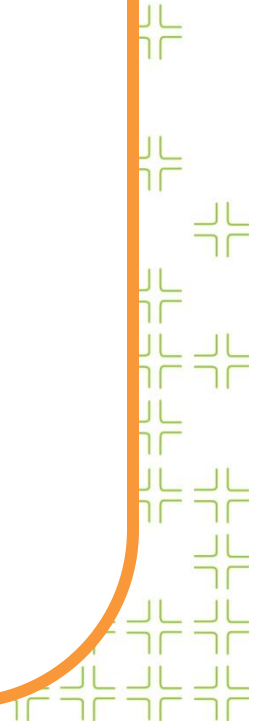
- ***If you want to make enemies, try to change something.***

- Woodrow Wilson

• **Change Management:**

- ***It may be hard for an egg to turn into a bird: it would be a jolly sight harder for it to learn to fly while remaining an egg.***

- C. S. Lewis



**“Approximately 70% of all CMMS implementations fail”**  
- statistic from the internet

- **S**
- **Implementation Defined:**
- **an Exercise in Putting the Cart Before the Horse**
- **Start by understanding your business processes**



# Barriers to Success

“Approximately 70% of all public works implementations fail”

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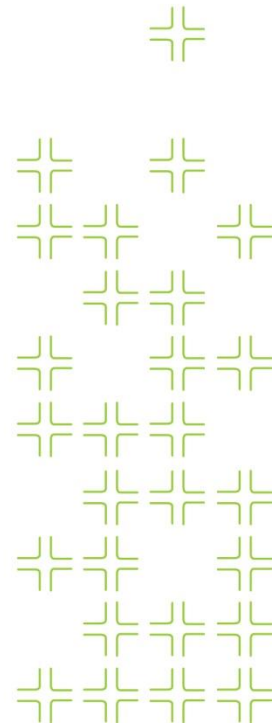
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## Training & Practice

- **Benefits:**
  - **User Buy-In & System Adoption**
    - **User Insight**
  - **Speed, Time and Money**
  - **Uniformity of Data-entry**
  - **Demonstrates Organizational Commitment**
- **Means:**
  - **Demonstrate specific benefits to employees**
  - **Respond to Push-Back Internally**
    - **Director's Backing / Representative**
  - **Mock Go-Lives = Excellent Pre-Launch Practice**

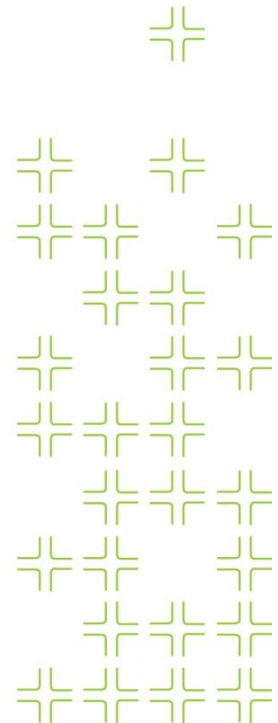




## Project Elements for Success:

1. Make knowledge transfer a mantra
2. Consistent support from the top
3. Minimal or Manageable software customization
4. Realistic Project Scope
5. S.M.A.R.T. Goals:
  - Specific
  - Measurable
  - Attainable (Identify responsible party)
  - Realistic
  - Timely
6. A well-managed project & launch plan
7. Clear & realistic data conversion strategies
8. Maximize Project Visibility
9. Maximize User Participation
10. Break Down Silos
11. Leverage it → Ongoing Improvement

→ More Implementation!





## Implementation at Lucity:

### Looking forward...

- Project Plans and timelines
  - Standardized Scope
- Implementation Teams & Specialist Roles
- Tools to Streamline Implementations
  - Turnkey Dataset
- Potential for regular management of SaaS installations

