

**Leveraging a CMMS to  
Drive Business Decisions**  
*including how to successfully select,  
implement, and manage a CMMS*

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The Road to Better  
**Facility Management**

## John Rimer, CFM

- 20 Years Facility Management
- Numerous Industries & Various Roles
- Owner, FM360, LLC
- Certified Facility Manager (CFM) - IFMA
- IFMA & BOC Qualified Instructor

### Related Experience

- Implemented/managed CMMS for multiple companies
  - Intel, Microsoft, Albertsons/Safeway, Dendreon, & others

# Learning Objectives

- Discuss the value a CMMS can provide to an organization
- Identify core functions of a CMMS
- List steps for selecting, implementing, and/or improving a CMMS
- Recommend key performance indicators and reports

# Alphabet Soup...

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- **CMMS** – Computerized Maintenance Management System
- **CAFM** – Computer Aided Facility Management
- **BIM** – Building Information Modeling
- **IWMS** – Integrated Work Management System
- **ERP** – Enterprise Resource Planning
- **EMS** – Energy Management System
- **BMS** – Building Management System

# Why a CMMS?

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*"The Nervous System of a Facility Program"*

- Necessary Business Tool
  - Drive Business Decisions
  - Assess Efficiency & Effectiveness
  - Develop Zero-Based Budget
  - Capital Replacement Program
  - Central Repository
  - Market FM Program



# Coordinating & Scheduling

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- Prioritize Work
  - Criticality
  - PM vs. CM vs. SR
- Consolidate & Coordinate Tasks
  - Minimize Windshield Time
  - Mitigate overlap of tasks
  - Schedule Downtime
- Pre/Order Material & Parts
  - Parts Bagged & Tagged
  - Parts Runner
  - Auto-Order through Supplier
  - Automate Approval Process



# Effective & Efficient

- Efficient Use of Staff/Contractors
  - Coordination & Scheduling
  - Right Task / Right Person / Right Time
  - Dispatch & Confirm
  - Svc Provider CMMS Access
  - PM Completion by Priority
  - % Utilization
- Maintenance Effectiveness
  - PM/CM Ratio
  - Discovery Mode (CM Source)



# One Stop Shop

## Central Electronic Repository

- Drawings/One-Lines/As-Builts
  - Management/Update Policy
- O&M Manuals, Test Reports, etc.
  - Cx, TAB, Electrical
- Procedures
  - SOPs, MOPs, & EOPs
- System/Equipment Information
  - Critical Spares
  - Equipment Specs





# Substantiate Budgets

- Operations Budget
  - Contract labor
  - Internal labor
    - Scheduled (PM/PdM)
    - Unscheduled
  - Parts & Material
- Capital Budget
  - Capital Replacement Program
  - Multi-year forecast (1/3/5/10)
  - Year Installed
  - Life Expectancy
  - Cost of Install/Replace



# Risk & Compliance Management



- Change Management
- Organized Records/Certificates
- Maintenance Reports
- Training Management
- Document Management
- Emergency Preparedness
- Incident Management

*"Think Like a Lawyer..."*



# Drive Business Decisions

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- Risk, Strategy, & Revenue
  - Rule 100/10/1
  - Triple Bottom Line
- Monitor Performance
  - Auto-Reports, Dashboards, & KPIs
  - Tie to Strategic Objectives
- Data-driven decisions
  - Failure Analysis (Failure Codes)
  - Uptime/Downtime
  - Reduced Redundancy



# Market FM Program



- Touchpoints
- Customer Interaction
  - Receive Service Requests
  - Communicate Expectations
  - Provide Status Updates
  - Solicit Feedback
- Marketing with KPIs
  - Customer Satisfaction (“We Care”)
  - Highlight Progress
  - Benchmark Performance

*“Always Selling...”*



## How to Select a CMMS

- Common Reasons for Failure
- Steps to Selecting a Provider
- Key Functions of a CMMS
- Other Factors to Consider
- Going Mobile
- System Integration



# CMMS is Not a Four-Letter Word...



## Common Reasons for Failed CMMS

- Wrong System for the Job
- Old, Slow System
- Homegrown
- Budget to Install but not to implement
- Insufficient planning & Stakeholder Buy-in
- Lack of Knowledge & Experience



# Steps to Selecting a CMMS

- Identify Stakeholders
- Define the Processes/Workflow
- Develop System Requirements
- Create Assessment Matrix
- Evaluate Qualifying Vendors
  - Perform Test Fit
- Budget & Schedule for Success
  - Training & Support
- Solicit help



# Other Considerations

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- Online/Cloud vs. In-House
- 90% Out-of-the-Box
- Ease of Use
  - Minimize Work-Arounds
  - Quick Clicks
- Reporting Capability
- Stability & Reputation
- Champion – Find One & Be One!

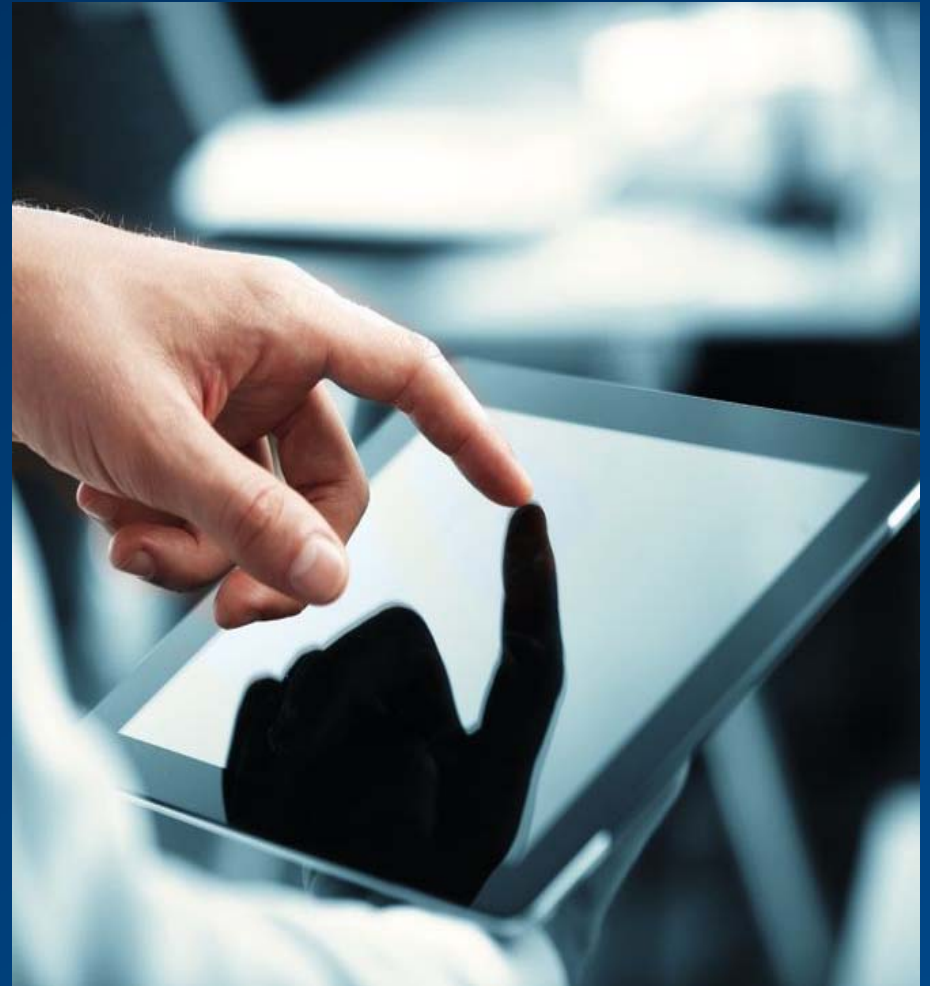




## Going Mobile...

### Advantages

- Capture data on the fly
- Incorporate pictures
- Quicker response
- Utilize GPS/GIS
- More accurate data
- Info at Fingertips
- Keep trades in the field



# Going Mobile...



## Challenges (How to Overcome)

- Costs
  - Offset by Increased Productivity
- Ruggedness
  - Lower cost equipment
  - Rugged cases
- Chicken-Pecking
  - Dropdown Lists
  - Utilize 2D/3D codes
  - Voice Recognition
- Change
  - “Makes their life better”
  - Not Big Brother



# Work Smarter...

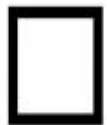
- Integration through API
  - Application Program Interface
- Condition Based Maintenance (CBM)
  - BMS to CMMS
  - Metering
- Change Requests
- Financial Data
  - Purchase Orders & Invoices
  - Chargebacks
- Human Resources
  - Timesheets



# Implementation/Improvement

Do!

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## Start with a Plan

- Realistic
- Prioritized
- Phased
  - Site/Building/Department
  - System/Function
  - Module
- Budget for Resources
  - Hire Admin/Coordinator
  - Outside Support



# Recap

- Value of CMMS
  - Necessary Business Tool
  - Increased Productivity
- Common Reasons for Failure
  - Don't Know What You Don't Know
- Selecting a CMMS
  - User Requirements before Shopping
- Start with a Plan
  - Realistic Schedule & Budget





*Questions?*



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