

**MaintainX**

**The Ultimate  
Guide to a  
Seamless CMMS  
Implementation**



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# The Ultimate Guide to a Seamless CMMS Implementation

Implementing a new computerized maintenance management system (CMMS) is a huge undertaking. In fact, as many as four out of five CMMS launches fail. However, it's also one of the most powerful things you can do to make your day-to-day operations smoother and safer.







With the right approach and modern solutions, implementing a CMMS can be the catalyst that drives operational excellence, enhances safety, and maximizes production capacity.

In this step-by-step guide, we'll show you how to successfully implement your CMMS—from strategic planning to achieving rapid team adoption. Follow our proven roadmap to launch with confidence and start transforming your maintenance operations from day one.



# What is a CMMS?

CMMS is software that centralizes maintenance-related operational data and facilitates maintenance processes. It has become essential in the several decades since it first appeared for a few reasons:

-  It helps improve worker safety
-  It helps manufacturers avoid expensive unplanned downtime
-  It improves plant uptime by facilitating predictive and preventive maintenance
-  It makes maintenance activities more efficient
-  It reduces maintenance spare parts spending and inventory carrying costs
-  It helps serve the new generation of tech-savvy manufacturing employees

Together, these reasons add up to an overwhelming business case for purchasing a CMMS.



**30%** 

**Decrease in unplanned downtime**

[Read case study](#) →

**DURACELL**

**+50K** 

**Saved on parts inventory costs per site**

[Read case study](#) →



**30%** 

**Improvement in maintenance efficiency**

[Read case study](#) →

# Seven features to look for when choosing a CMMS

But before implementing a CMMS, you need to decide which one you'll move forward with.

Every organization will have their own requirements when choosing which CMMS to adopt. However, there are a few factors to consider—no matter your industry.

Here are the top seven features to look for when choosing a CMMS:

## Here are the top seven features to look for when choosing a CMMS:

### 1 Mobile capabilities:

Your CMMS should work for you, not the other way around. It's essential to make your factory floor software accessible to your frontline workers and not keep them bound to a desk. The CMMS you choose should be easily available on smartphones and tablets—and native to those environments for a user-friendly experience.

### 2 Ease of use:

Many of your workers might not be tech-savvy. Your software solutions must be as accessible and intuitive as the users' favorite personal apps.

### 3 Scalability:

Your CMMS should cover your needs, whether your business is a single plant that manufactures a small slate of products or an international conglomerate with multiple business units. This ensures your CMMS can scale with your organization and continue to adapt to your changing needs.

### 4 Ease of integration:

You likely already rely on multiple business software apps. Your new CMMS should seamlessly integrate with them so you end up with one source of truth for everything.

### 5 Long-term support:

Your CMMS provider must be able to supply thorough technical and business support for your team. That support should cover all phases of your project: pre-implementation, implementation, and post-implementation.

### 6 Effective AI/ML features:

Artificial intelligence and machine learning are becoming more effective every single day. They can deal with volumes of data and see patterns that are simply beyond human abilities. To remain competitive, your business will need those capabilities.

### 7 Ability to visualize data across the enterprise:

Processing all your data and recognizing powerful patterns is a first step. But making data actionable means putting it into forms that people can process, draw conclusions from, and make decisions with. This means your CMMS should have dashboards and analytics capabilities.

**Once you've gone through this checklist and decided which CMMS is right for your business, you're ready for the next step pre-implementation.**

# Pre-implementation checklist

Implementation can make or break your organization's relationship with CMMS. That's why you should be thoughtful and intentional about it.

Because of its importance, there are several steps you should take to get ready—pre-implementation—to make sure the actual implementation goes off without a hitch.

## Start with the users

Your CMMS implementation will only be successful if your people use it. For each group of users, you should apply the WIIFM framework—i.e. “What’s in it for me?” If the tool doesn’t make their jobs easier, they probably won’t jump on board. People should be able to see and understand the benefits of a successful implementation—including less paperwork and better data quality.

Open communication with employees is also critical throughout the implementation process. Start by getting input from frontline employees beforehand on how to make the implementation a success. What resources do they want—like training—that will help them adopt this new tool?

## Conduct thorough discovery

Before you get started, it's important to define where your organization currently is on its maintenance journey, and how the launch of your CMMS will further progression.

To do this, first establish a project charter—a formal document detailing implementation plans—that identifies your current state. From there, you can identify your desired future state and establish metrics you'll use to confirm your progress. You should base those milestones on major project goals by site and by business area.

The charter should also identify critical project roles for implementation. Those will include:

**Project manager:** The overall business lead for a multi-site rollout project

**Lead champion:** The implementation leaders for each of your manufacturing sites

In addition to internal company resources, you should also identify key CMMS provider resources, such as an implementation manager.

Clearly define all of these roles from the start, including who owns each part of the implementation plan.

## Focus on operations KPI gains

Before implementation, give thought to what operational and quality improvements you expect or want, and make them part of your CMMS launch goals. Some common maintenance KPIs to track are:

- Mean time between failures (MTBF)
- Mean time to failure (MTF)
- Overall equipment effectiveness (OEE)

Which KPIs will a CMMS improve? What specific gains do you expect to make?

And remember—improving manufacturing operations often improves the safety, effectiveness, and efficiency of your maintenance practices. Sounds like a win-win.

## Quantify cost savings

Most projects that require spending also require a payback on the investment. In other words, the maintenance and operations improvements you anticipate should deliver an ROI in the form of cost savings. You should quantify cost savings beforehand and track them during and after implementation in order to determine ROI.

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# Using the MaintainX ROI Calculator

Even people on the front lines of manufacturing are sometimes shocked to learn just how much money their unplanned downtime costs them.

**According to MaintainX's State of Industrial Maintenance Report, an hour of unplanned downtime costs a facility around \$25,000 on average. For larger organizations, this can skyrocket to more than \$500,000.**

Ready to get a handle on unplanned downtime? Use MaintainX's ROI Calculator to see how much money a CMMS can save you.

## Identify necessary training

Each site should develop thorough plans for user training, divided by user groups and work levels. Work with your CMMS provider to establish a timeline for that

training and determine the support required at each site to accomplish it.

## Set asset management and data migration expectations

Your project manager (and their team) should identify what assets will be managed within the CMMS. Once they've done so, each site should use that information to choose specific assets to incorporate into the CMMS during the launch.

Similarly, at this point, you can also determine what master data you'll need to migrate to the CMMS during the launch and then identify the data sources and migration plans.

In both cases, ask your team to identify data standardization opportunities as they proceed, both within sites and across the broader organization.

For example, if you're implementing the spare parts inventory management feature, you'll need to ensure that you have a complete and accurate inventory of those parts ready to load into the CMMS.

## Establish the critical path and expected end date

Establish a project start date and use the "critical path method" to determine a feasible project completion date. To use this framework, list all your implementation tasks in chronological order, including how long each task will take to complete. The critical path method also considers which tasks you can accomplish concurrently and which tasks will require you to complete other tasks before moving forward.

The first draft of this plan usually presents a best-case scenario. However, it's also important to anticipate potential problems and conflicts and establish contingency plans for them.

## Create a post-implementation plan

Finally, you should develop a post-implementation plan. The initial CMMS implementation shouldn't be the end of your maintenance journey—there will always be work to achieve true predictive and preventive maintenance capabilities.

At a minimum, you should put together a short-term plan to continue that progress.

# Step-by-step guide to a successful CMMS implementation

## Now, it's finally time to implement your new CMMS!

All the work you've done so far was worth it—you've set yourself up for a successful implementation. Here are the next steps you should take to fully onboard your organization and people to the CMMS.



### Build the asset database

A critical part of implementation is building the asset database within the CMMS. Use clear asset naming conventions that consider your operating system, maintenance software, workflows, and international standards for file naming conventions.

Similarly, if you're launching the spare parts inventory management portion of your CMMS as part of your implementation, you'll need to load those inventories and establish nomenclature standards for them as well.



### Set up your initial PMs

Loading periodic maintenance (PM) work orders into the system is another key element of implementation. While nobody expects this effort to be all-encompassing during your initial CMMS execution, you should have at least one PM for each critical piece or class of machinery.

[Get the guide on work order management →](#)



### Offer comprehensive training

A CMMS is only as good as the people who use it. Incorporate up-front training during implementation so that, once everything is in place, users will know how to leverage the CMMS. The best training also involves the actual software—make sure your employees have time to play around with the CMMS while they learn.



### Employ established best practices

Site leaders should be in direct contact with the end users—the frontline employees—throughout the implementation process. They should communicate findings and concerns immediately up the chain to the overall program managers. Be sure to engage all stakeholders, make the overall vision clear to them, and establish cross-functional teams. Don't forget to communicate and celebrate milestones!

Use the train-the-trainer model, a strategy where experts train instructors who then train others. This creates a ripple effect that efficiently spreads knowledge and skills throughout an organization. Every organization has people who are naturally good at using new software—they usually self-identify early in the process. Making them power users and ensuring they're available to train their peers will streamline your efforts.



### Align teams with clear plans

Make your implementation plan clear and known at all levels before and during project execution. The plan should follow logical, well-defined implementation steps so everyone is on the same page. Communications should focus on that plan and how things flow against the critical path timeline. You and your team should immediately call out any deviations so you can direct resources where they're needed. Tools like the A3 problem-solving method and the Plan-Do-Check-Act project planning cycle can help bring discipline to your efforts.

Track progress against the critical path project plan throughout the implementation. This is where your contingency planning can pay off! By using these methodologies you can make course corrections when necessary without compromising the overall project timeline.



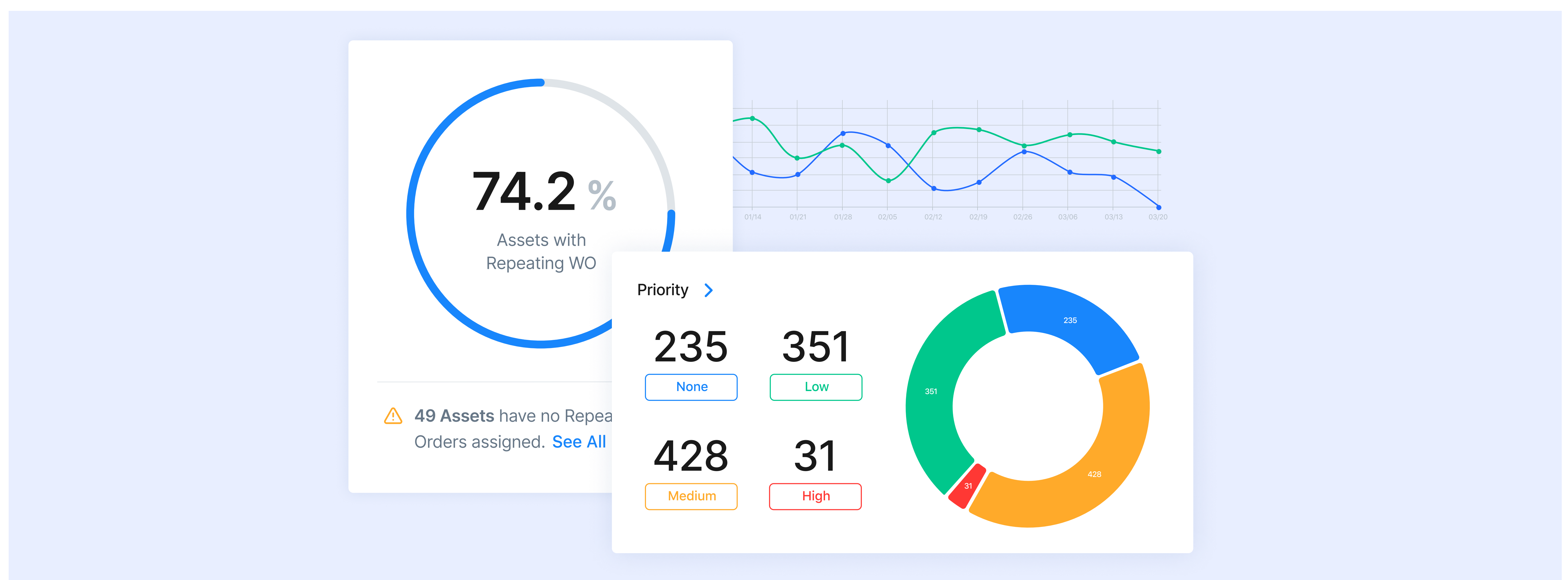
### Safeguard operations

Ensure thorough asset management and PM coverage for all operations and support equipment. It's easy to remember all the machinery directly involved in production. However, it's also easy to forget the equipment that isn't on the production floor but is critical to your operation. Be sure to include production-related systems, like air compressors and boilers, as well as human safety and comfort systems, like HVAC systems and wastewater treatment machinery.



### Set up permissions

Access to the CMMS should look different for different levels of users. Simplifying the app for floor workers makes adoption smoother and easier while having the right higher-level tools for professionals and managers will help them get the most out of your CMMS.





## Avoid common pitfalls

**Leaders not aligned on implementation goals:** Everyone needs to aim for the same target. It's the only way the whole team can pull in the right direction. Get clarity on goals and buy-in across leadership in the pre-implementation phase.

**Trying to “run” before “crawling” and “walking”:** A CMMS implementation is a huge undertaking. Be realistic about where you are now. The reality is that few organizations are fully adept at predictive and preventive maintenance, so don't be embarrassed to admit if you're still mostly reactive. It's an indication of how difficult early CMMS was to use. Luckily, today's software is much better at facilitating your move toward predictive.

**Failure to set data correctly:** Accurate master data is a key building block for the long-term success of your CMMS. Be sure to get this right to prevent major pains down the road.

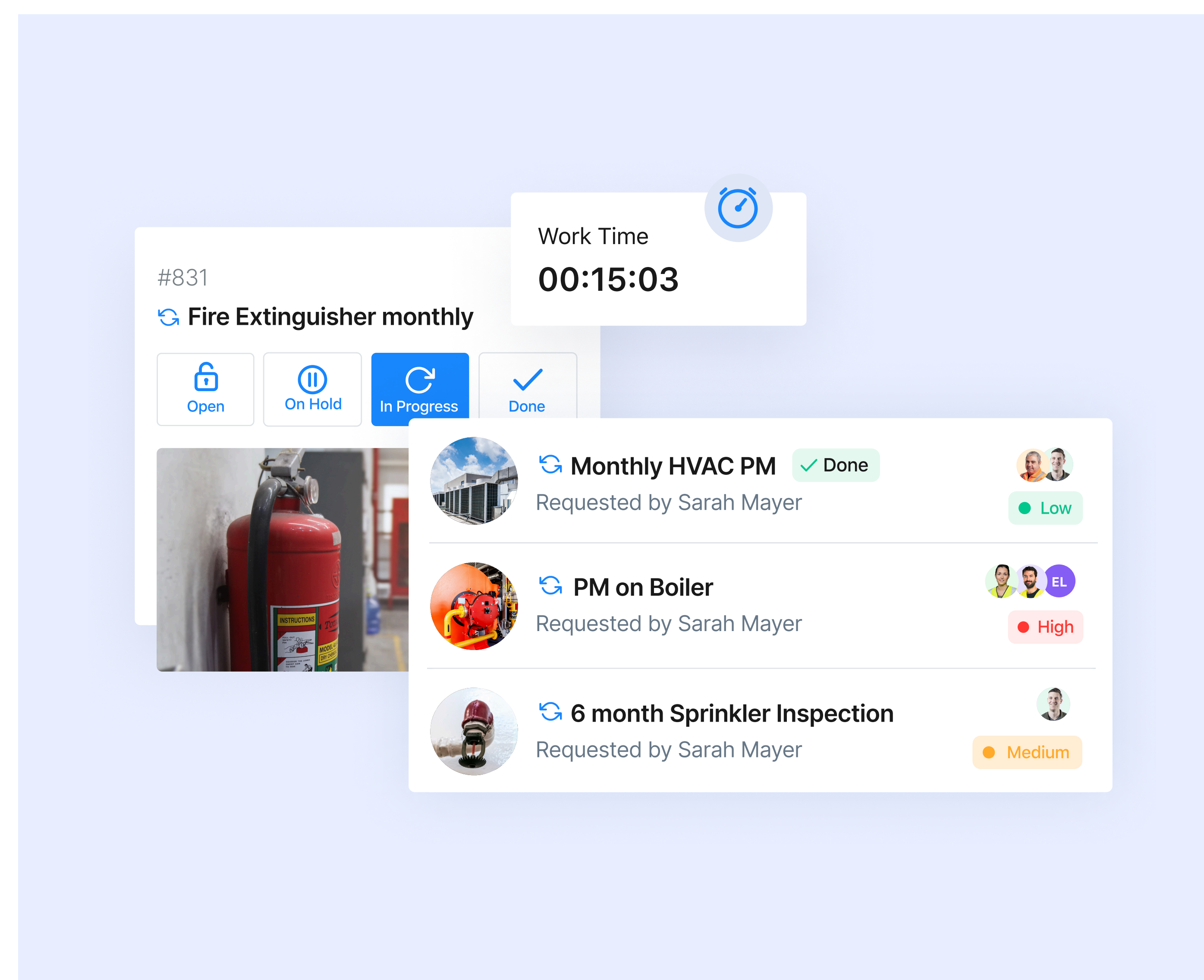
**Lack of training or missed training:** Not having the right training up front—or not having the right people in the training—will make achieving your project goals difficult, if not impossible.



## Measure success

Throughout your CMMS implementation, be sure to track your progress against your implementation goals and milestones. These will include items such as: training attendance, participation, and completion; master data importation completion; asset database clarity and thoroughness; work order generation and completion; and PM development.

Critical success measures include your work order completion rate and your preventive to reactive work orders ratio. Don't expect those numbers to improve dramatically right out of the gate—be on the lookout for declines that might indicate problems with training or system adoption.



At the end of your implementation, that tracking can serve two important purposes. First, it clearly identifies the many wins your team has achieved so that you can properly recognize and celebrate successes. Second, it identifies any unfinished items so the team can quickly and effectively “mop up” the final project execution requirements.

# The successful CMMS implementation

If you follow all the recommendations above, your company will be the proud owner of a very valuable and capable new tool at the end of its CMMS implementation.

But that's not the end of the story.

In many ways, establishing the tool is only a first step—even if it's a big first step. As your teams continue to use your new CMMS, it will become more useful as data and capabilities are added and PMs are developed. It requires continued focus to get the biggest bang for your buck from all those areas.

That being said, with successful implementation, your maintenance processes and your operational effectiveness will see big gains.

All reputable CMMS providers will help you realize those initial gains and empower you to take advantage of additional software capabilities.

For example, at MaintainX, we help with both your initial CMMS implementation and your ongoing maintenance improvement efforts. Our implementation specialists are trained and skilled engineers with real-world field experience in manufacturing. They've also gained expertise in change management and can get a site up and running in three weeks.

**If you're ready to get started, contact one of our product experts to learn more about how MaintainX can help you with your CMMS needs.**