



The First Step Of Your Maximo Upgrade:

How To Better Understand Your EAM
Data For A More Successful Upgrade



Overview & Takeaways

- Identifying initiative/EAM upgrade goals
- Analyzing the data available to enable the monitoring of performance throughout
- Recognizing and addressing risks that could reduce the success of the project
- Finding opportunities and creating measures to manage the upgrade process



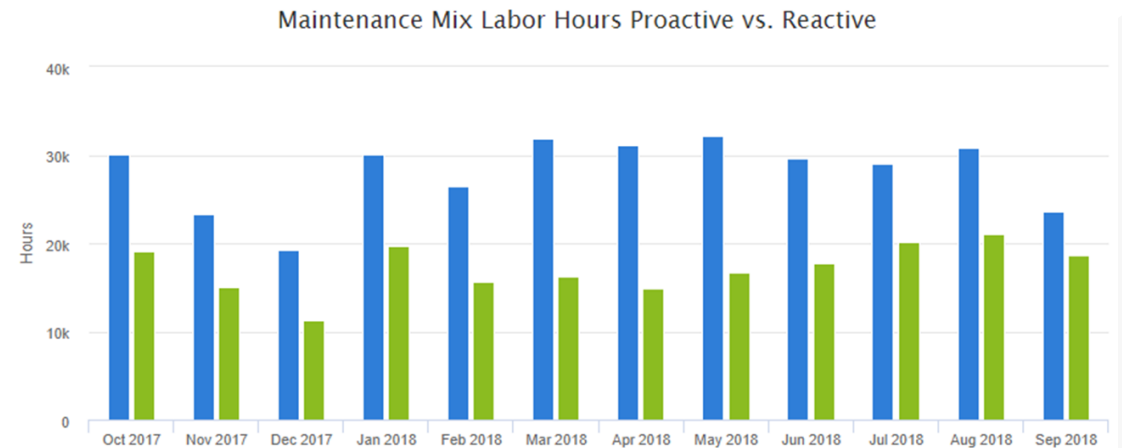
Company Highlights



Propel™ - Performance Management

Bridging the Gap Between Strategy and Execution

- Align people and processes with objectives
 - Identify and assess operational risk
 - Visualize impacts and outcomes of continuous improvement initiatives
 - Transform *trustworthy* data into actionable information
 - Manage continuous improvement initiatives to achieve targets
 - Operationalize and Automate performance management
- Performance Management Service
 - Assessment
 - Real-time performance metric visualization solution
 - Rapid Implementation “weeks, not months or years...”
 - Visualize, Align, Act



Presenter – Matt Midas

VP Performance Management Solutions



Work Experience

- USMMA
- US Navy
- Charleston Naval Shipyard
- Service Master Facilities Management
- PSDI/MRO Software
- Genesis Solutions/ABS
- Solufy/Prometheus Group

Knowledge Base

- 30+ years in Engineering & Maintenance Management
- Overhaul and Repair (S5W/S6G Reactor Plants)
- Performance Management
- Reliability Centered Maintenance
- Planning and Scheduling
- Business Process Development & Improvement
- Work Management
- Safety Programs
- Maintenance Strategy / Optimization

Presenter – Joe Lonjin

Performance Management Consultant



Work & Client Experience

- Stanford Healthcare
- Corning
- Arizona Public Service
- Penn State University
- Lockheed Martin
- Northrop Grumman
- Cheniere Energy
- Colonial Pipeline
- US Army

Knowledge Base

- 20+ years in Facilities & Maintenance Management
- Performance Management
- Data Quality
- Project & Change Management
- Business Process Development & Improvement
- Work Management Workflows, Analysis & Implementation
- EAM Functional Specifications
- Maintenance Strategy / Optimization



Why upgrade?

- Replacing system/re-implementation
- Upgrading/changing business processes
- Compliance/Security
- Hosted, and thus required to remain current
- Part of IT/EAM strategy
- Mandate
- New capabilities
- Compatibility with other solutions or systems



Poll Question #1

Are you considering an upgrade
near term?



Important Elements

- Purpose & Scope
 - Clearly stated goals (examples)
 - Zero downtime upgrade to remain current with OEM support and security, no process or user interface changes, will include retraining on current process.
 - Upgrade to support new business processes for Planning & PM Optimization
 - Upgrade will include screen changes and start centers to support training on Asset data entry.
- Scope
 - Specify if items are not included.
 - Mobile will not be included/affected.
- Communication
 - Cover the purpose, scope, and timing.
- Obstacles
 - Integrations, system compatibility, holidays, downtime expected, new devices

Initiatives

- Zero downtime upgrade with no changes
 - Ensure continuous use of Maximo with no impact on work management.
 - Retraining on current process to support work order closeout.
- New business processes
 - Increase estimating accuracy.
 - Increased PM compliance using escalated priorities
 - Reduce PM work on RTF assets
- New data focus on asset attribution
 - Increase the number of Assets with complete data based on Asset Management Plan

What data from the EAM can we measure?

1. No impact on work management
 - a) Work Closeout Completeness
 - b) Work Order Anomalies
2. Increase estimating accuracy
 - a) Estimated vs Actual Labor Hours
3. Increased PM Compliance
 - a) PM Schedule Compliance
4. Reduce PM work on Run-To-Failure assets.
 - a) Count of RTF Assets with active PM's
5. Increase the number of assets with complete data per definition.
 - a) Count of assets missing asset type or invalid.

Poll Question #2

Have you ever analyzed data before
and after an upgrade?

Considerations

- Review your existing documentation
 - Strategic Plan
 - Asset Management Plan
 - Data Management Plan
 - Business Processes
- Identify all changes and risks
 - What data will change, be created, or be lost?
 - What risk needs to be removed or mitigated?
- Develop a measurement plan
 - Can you measure the results of your business process?
 - What data is related to identified risks?
 - Do we have internal benchmarks to compare against?

Post upgrade review and data annotation

- **Review**
 - Compare data trendlines
 - Set targets and performance bands
 - Watch for anomalies
- **Monitor Initiatives**
 - Initiatives should be visualized on metrics for reference
 - Evaluate effort vs return
- **Annotation**
 - Ensure upgrade is indicated on metrics via initiatives
 - Provide specific input on known data points
 - Capture tribal knowledge and data context to support continuous improvement

Data & Upgrades - Key Points

- If an upgrade supports **initiatives**, the goals should align with your objectives and long-term plan/road map
- Initiatives should be visualized and measured in order to understand impact and Return-On-Investment (**ROI**)
- Personnel appreciate feedback on upgrade success, this supports continued **buy-in** for systems management
- Understanding your **data**, and its current state, will allow you to manage upgrade success
- Identifying measures related to changes allows you to directly manage change and risk
- **Communication** and **Change Management** are *vital* for success (not just in upgrades)
- **Continuous Improvement** is the ultimate goal, it is a never-ending cycle

Networking



Find us at these upcoming events:

- Virtual GoMaximo <https://www.gomaximo.org/agenda2020/>

Contact Us:

- Website: www.cohesivesolutions.com
- Joe Lonjin: jlonjin@cohesivesolutions.com
- Matt Midas: mmidas@cohesivesolutions.com