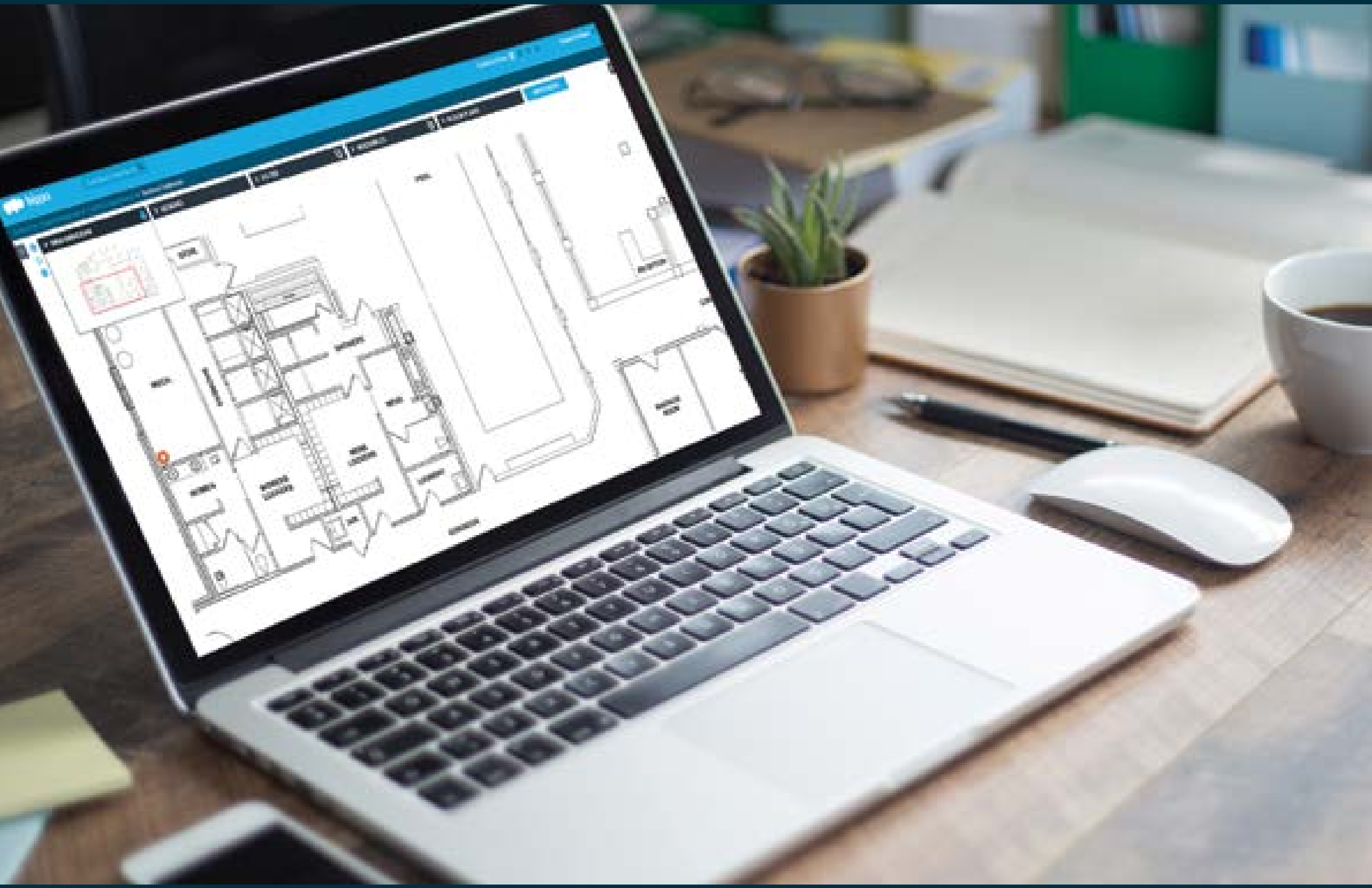
CMMS Basics & Beyond

How to get the most out of your maintenance management system

A Guide by Hippo CMMS, Maintenance Solutions Experts



Part 3
CMMS Rollout

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Part 3

CMMS Rollout

Now that your system has been setup and integrated, it is time to roll it out to your team for use. The majority of this section will outline different forms of training that vendors offer and how to optimize training for your team. We will also discuss software resistance from employees and how to minimize these reservations.

The Importance of Training

Adequate training is a crucial step in properly diffusing software knowledge to your entire organization and in ensuring its ongoing success. Training is the number 1 factor in a successful software system. If users are confused over functionality or nervous to try something new, the level of uptake will be severely decreased, and your system won't get off the ground. Depending on the technical skill level of your organization, you may require more hours of training delivered in incremental sessions and through different methods. Follow our training and rollout tips below to ensure you are optimizing your time.

9 Tips to optimize your rollout strategy

1 Keep it short, simple, and sweet

We recommend that all organizations get at least 2 hours of training for their staff to ensure that everyone is comfortable with software navigation and has proper comprehension of key product features. Some vendors offer free training at the beginning of any license and many let you buy and bank hours to use when you need them. We encourage that sessions are only 1 hour long so that key concepts can be discussed and practiced before diving into more advanced features. Throwing a lot of information all at once to trainees is a sure fire way of creating confusion amongst your team. It is important to remember that each user comes with a different technical skill level and that keeping training topics simple and concise is the best way of making sure your team feels confident with their new software.

2 Make an agenda

The vendor's training team can teach you everything you need to know about your software, and much more! Although they usually keep training sessions to one or two topics, it is a good idea to come into every session with a game plan. Knowing what you want to get out of a session will help to avoid getting off topic or becoming overwhelmed. Play with the software before you go into training so you can create a list of questions you need answered by the end of the hour. Trainers love when users lead the session as long as you stick to your own script!

3 Utilize user permissions

User permissions tell the software what a user is allowed to do or see in their account and what should be hidden. So as not to overcomplicate a user's workflow, make sure that fancy features are turned off for those who don't need to use them. By constructing a simpler interface, users won't get distracted with useless buttons or veer off course from their basic task during training and in real world scenarios.

4 Define the work order process

To determine which permissions should be granted and which should be hidden from a user, define the work order process. Identify which users submit a work order/ request, who assigns this WO to the maintenance team, and who closes out the WO. Once these roles are defined, clear permissions can be granted depending on their responsibility in this process. For example, don't let junior maintenance technicians view all the work orders in the facility at once. Instead, give them permissions to view only their own so as not to overwhelm them with work they don't have to complete.

5 Choose the right delivery method

Vendors offer a variety of delivery methods to communicate software features and functionality to your team. Understand the needs of your team in order to choose the best one.

a. **Web Conference Training:** Brought to you via Go To Meeting or Webex, trainers will share their computer screen online with trainees to demonstrate a particular topic or display software navigation. The trainee will follow along at the comfort of their own desks, asking questions via telephone, and interacting with the software by repeating the motions of the trainer. Sessions are usually recorded and can be requested by the trainee to use as reference.

b. **On Site Training:** The trainer will visit the offices of the organization to present a live topic or display software navigation to a group of trainees. Training manuals may also be used to follow along.

c. **Online Resources:** Vendors may develop wiki's, online forums, training manuals and video tutorials featuring FAQ's and software terminology that is available 24/7. These materials support the user as they navigate the software and come up against specific issues.

d. **Ongoing Support:** Most vendors have support emails, phone numbers, support request tickets, and even live support chat. These platforms allow the vendor to be available at different times of day to answer one off questions about feature use or software functionality

6 Rollout Slowly

Conduct trial and error testing to a small sample of your users with different job roles. Make sure emails are firing to the right users, features are showing up to those with the right permissions, and that login credentials are working. Once your test is complete, you can roll out to your entire user group.

7 Identify the key users

Often we see big training groups fail because they weren't able to get enough personalized attention or felt uncomfortable asking questions. Getting a large group to sign up for training can be a challenge as people are busy with their daily work schedules without having to learn yet another software. To mitigate this, we recommend you identify one or two key software users in your organization and make them the software champion. It is their responsibility to sign up for training, understand basic features and then take it back to the rest of the team. They can field questions from the rest of their team and follow up with the vendor on the answers. By having an internal software guru on staff, the rest of the team will feel more comfortable to ask questions to someone they know and chances are they will get a quick and simple response.

8 Create your own training materials

Sometimes vendor manuals and support documentation may be a little too detailed for the average user. Create a one or two page training document on a key function in the software. A simple screenshot and 3 or 4 steps describing how to complete the task would do. By getting right to the point and having a simple document on hand, you'll be fielding questions much less frequently.

9 Overcome tech-anxiety

When bringing something new into any work environment, people have a tendency to resist change. This factor can be exaggerated if the "new" thing is software as many people feel they do not have the technical skill level to master a new program. With a steep learning curve in mind and the perception that this system will simply add to their workload instead of making their lives easier, it can be difficult to get people on board and thus a system could fail. Apart from choosing a very user-friendly software and reinforcing the importance of training to your team, one of the best ways to reduce tech-anxiety is to explain the benefits of a CMMS to your team in terms that are relevant to them. Most of your requesters won't care that you can report on a wide range of maintenance history items and they definitely can't relate to the benefits of housing your asset info in one place. They would, however, enjoy a simple request form that they can easily use to submit work order requests. By explaining benefits that apply to different job roles from maintenance techs to requesters to mid-level managers, more people can get on board with the same system.

Key takeaways

1 | Keep it short, simple, and sweet

- Sign up for at least 2 hours of training
- Break each session into 1 hour segments to discuss 1 topic at a time
- Keep topics concise and relevant to the trainees
- Be aware that each user may have a different technical skill level

2 | Make an agenda

- Begin each training session with your own game plan
- Play around with software before your training session to have a list of questions prepared

3 | Utilize user permissions

- User permissions allow system users to gain access to features/functions that they need, and to hide those that they don't
- To reduce interface clutter and confusion, turn off functions that a user doesn't need access to.

4 | Define the work order process

- Identify the flow of your work order process, from who submits,accepts, modifies and ultimately closes out the work order in order tobetter understand user roles and process inefficiencies.
- Correct these inefficiencies by reassigning user permissions and tightening up processes.

5 | Choose the right delivery method

- **Web conference training:** Trainers share their computer screen online with trainees to demonstrate a particular topic or display software navigation.
- **On-site training:** The trainer visits the client's office to present a live topic or display software navigation to a group of trainees.
- **Online resources-** A collection of manuals, documents, tutorial videos and forums available 24/7 to support a user as they navigate the software.
- **Ongoing Support:** Various channels such as emails, phone numbers, support request tickets, and live chat used to support a user as they navigate the software.

Key takeaways

6 | Rollout Slowly

- Conduct a trial with a smaller group of users before rolling out to your entire team. Gauge the success of the system, user permissions, email linkage, etc.

7 | Identify the key users

- Choose one or two key users who will undergo training from the vendor and then pass this info on to the rest of the team.

8 | Create your own training manuals

- Vendor training manuals can be more complicated than a user may need
- Create a one or two page document in house to outline one key function in the system.

9 | Over-come tech anxiety

- Tech anxiety stems from the preconceived notion that new software programs are difficult to learn.
- To overcome tech-anxiety choose a user friendly software, stress the importance of training, and explain the benefits of a CMMS in terms that are relevant to them.

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About Hippo CMMS

Hippo CMMS is a powerful, user friendly web-based maintenance management system. Its flexible platform includes all the CMMS features required to streamline maintenance operations of any size in a variety of industries; healthcare, manufacturing, retail, hotels, college campuses and more. Hippo makes the complex simple with its easy to use interface, unlimited users and lifetime customer support.

Contact Hippo CMMS for information about the software or a live demo.

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