



# CMMS Basics & Beyond

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How to get the most out  
of your maintenance  
management system

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A Guide by Hippo CMMS, Maintenance Solutions Experts



## Part 4

Post purchase and system optimization

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# Part 4

## Post purchase and system optimization

Even after you've successfully rolled out your new software, there is still some work to be done to ensure ongoing support of your system. Post purchase is a time when features, training and setup can be refined and measured. By taking a critical eye to your system you will be able to go beyond the basic functionality that you learned initially and dig deeper into more advanced features.

### Post Purchase Timeline

#### 1 | Short Term (3 weeks to 1 month)

Assess your newly created database and determine its current strengths and weaknesses. Make sure all basic features are working properly, that all users are receiving the right work order notifications and status updates, and that your team is getting the hang of integrating this new system into their everyday work life. Speak to different users to understand any challenges that they may be facing and follow up with a member of your vendors' training staff to seek advice or get more training to mitigate these issues. If a process is working really well or you are seeing great benefit from a particular feature, maybe someone else in your organization would also see benefit from utilizing the tool. Slowly add new permissions to users throughout this period while striking a balance between robust functionality and software simplicity. These small changes and tweaks to the system will help to address user concerns while simultaneously getting the most out of your software.



This section explains follow-up steps to complete 1 to 2 months after you have rolled out your system and the best ways that you can optimize your current system.

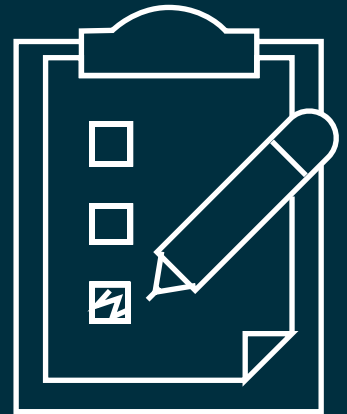


## 2 | Medium Term (1 to 2 months)

After about a month of consistent software use, you will have collected enough maintenance history data to begin reporting on these activities. Reporting is one of the most robust and beneficial features that a CMMS can provide. You can analyze in depth data to discover patterns and make better decisions. From HR decisions to repair and replace decisions to reordering spare parts, you can report on a wide variety of items or narrow your focus to view micro data. You will probably require one or two training sessions to adequately dig into your software reporting tools. Since the scope of reporting can be so varied, other members of your team may also find benefit in this feature. Reach out to your vendor to book a reporting-only training session for your team. The vendor can explain different types of reporting that may be helpful for stakeholders on your team, or each member can attend the session with a reporting objective in mind.

## 3 | Long Term (3 months+):

In addition to reports training, get better acquainted with all features of your software by booking sessions with your vendor's support team. Make sure that you keep these sessions short -limit them to one hour at a time- but frequent. Once you're aware of the many ins and outs that your system has to offer, you'll be able to truly master your software. Keep in mind software vendors come out with new updates throughout the year. Depending on if your system is deployed via web or is an installed solution, these upgrades will be received and communicated to your team differently. With web-based, small changes that may prove to be very beneficial to the user aren't always directly



Visit [Appendix 2](#) located at the back of this document to take the maintenance software pitfall quiz. If you check “Yes” to one or more of the questions, chances are you’ve already fallen into an unfortunate situation. But have no fear, as this section outlines concrete action steps you can take to rid your system of negative pitfalls.

communicated. That's why it's important to stay in the know by taking advantage of free resources that your vendor most likely provides. These ongoing resources include new CMMS content like videos, articles, social media messaging, and blog posts. Subscribe to your vendor's e-newsletter, follow them on Linked In, and read their latest article. You can also check in with your account rep to see what's new and what's on their software development roadmap (aka a timeline of when new features will be released). By staying on top of the latest and greatest, you'll be the first to get new info and will most likely get to share your opinion on these changes while they are still in beta testing.



## Software pitfalls and how to avoid them

No matter how hard you may try, it's easy to lose your footing and stumble right into common software pitfalls. Identifying these challenges before they happen is an important first step to mitigate their effects.



### Pro Tip #6

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If you would prefer to complete this task internally, you can use your software to add automation to the process. Run a report to determine equipment that should be retired by using filters based on inactive assets. Many systems will then let you mass delete data in batches for quick and easy data cleaning!

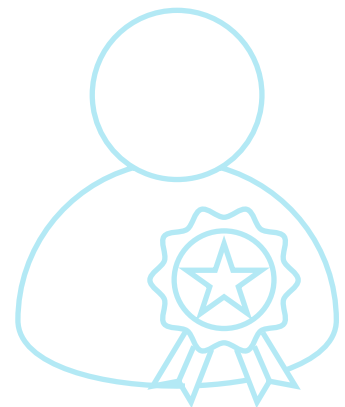
## Pitfall 1

### You've lost your software champion

Maybe they quit or got promoted, but either way your original software champion has left. If your software has been in place for a long time you may not feel it is necessary to appoint a new software champion, however this is often a costly mistake made by many organizations. A software champion is charged with the initial setup and implementation work to get the system up and running, they also play an important role in maintaining the system, answering basic software questions from new users, and staying in the know of software changes or upgrades that may occur overtime. Many companies are too busy to keep up to date with all of their software vendors and can easily fall behind on their system or miss a great tool that would have benefited them. For all of these reasons and more, it's important to always have an internal software guru in place.

#### ✓ Solution

The solution is simple, re-appoint a software champion in your organization to take over as the main point person for all things related to your maintenance management software. This doesn't have to be a time consuming job as the chosen person should already be well acquainted with the software. To get up to speed quickly, have them schedule training sessions as soon as possible with questions or specific topics already in mind. Explain the situation to the training staff and make sure they are clear on the items you would like to cover in these short and sweet sessions. Although it may be a little late at this phase, ensure your vendor is proactive when it comes to support services. Vendors who regularly check in with their clients usually see higher retention rates, more thoughtful users, and better client databases. If this is not



the case with your chosen vendor then have your champion be the proactive one. They should take advantage of free support resources like ongoing tutorials, demos, and product information. Ensure that the vendor has at least 3 up-to-date contacts from your company so they can always get a hold of someone and pass along key info to your team. Lastly, it is important to remember that software is simply a tool designed to help you manage your maintenance processes, it is not a fully automated robot. Your team must be accountable for the quality of your system by inputting clean and continuous data.

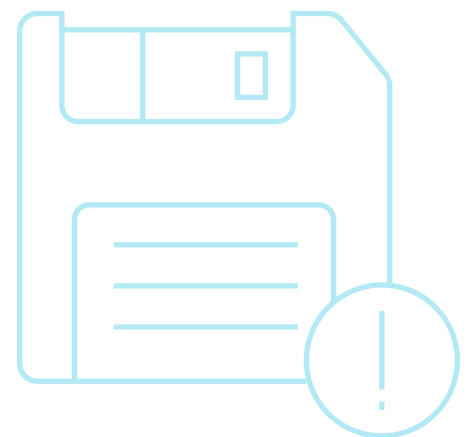
## Pitfall 2

### Your database is full of outdated information

If your data is teeming with open work orders, PM's that have never been closed out, or old contacts that haven't worked at your organization in years, then your database is outdated. Once your info is no longer relevant, the quality of your database and the benefits that maintenance management software can provide are decreased or eliminated altogether. It is important to cut the clutter and get your database back on track. Doing so may require some manual legwork to comb through and clean existing data. Although this may seem like a daunting task there are tips and tricks to get you up and running more quickly.

## ✓ Solution

Depending on the extent of your database clutter, you can opt to clean the data yourself or hire the services of your vendor. In addition to saving you many hours of tedious work, enlisting the help of your vendor will ensure quality control and accuracy. They can quickly view inactive data and remove work orders, users or outdated pieces of equipment from your system in a matter of a few business days or hours.



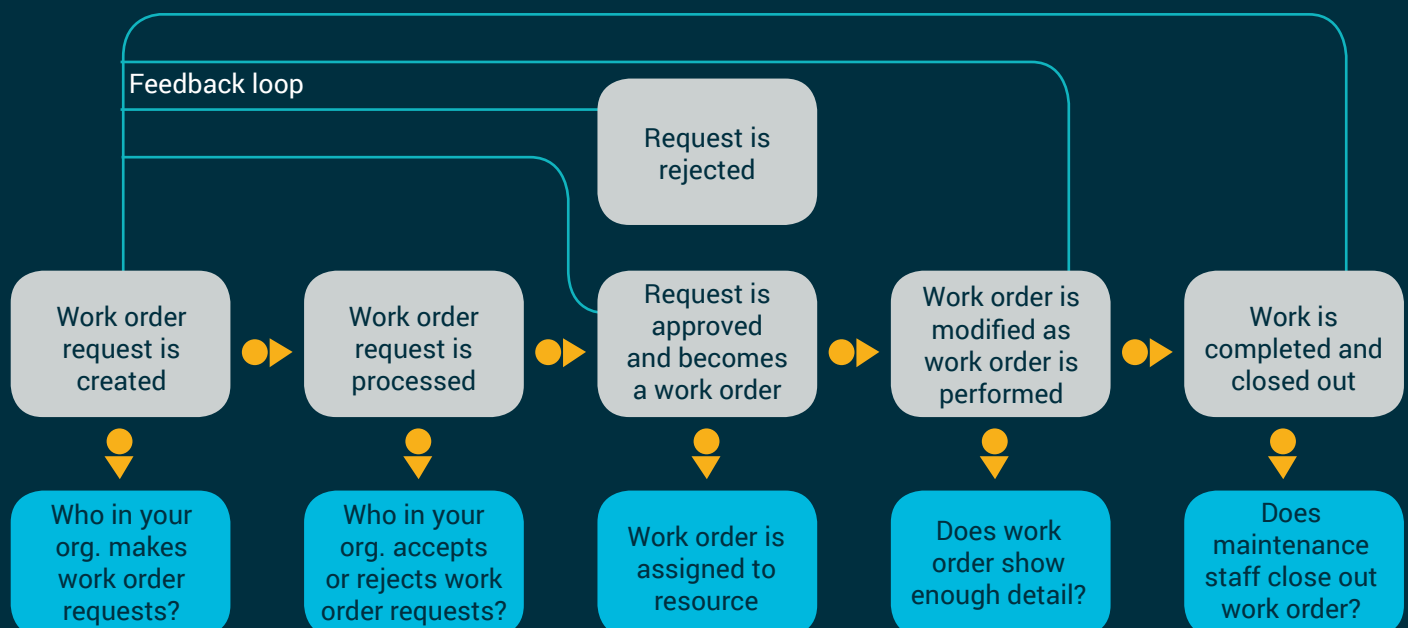


Now that your system is clean and comprehensive, it is important to institute a control system ensuring that your database stays that way. First, assign a staff member (perhaps your software champion) to be your go to “data removal person”. Create a procedure where your maintenance team and staff members report any maintenance or user changes- such as noting when equipment has been retired or when a user of the software leaves- to the data removal person. On a frequency of their choice (we recommend bi weekly), they should remove the outdated info from the database. Additionally, make it a mandatory policy for maintenance techs to close out their work orders once the task has been completed. You’d be surprised how many people don’t! By getting used to this communication process and instituting usage policy, your database will remain clean and tidy for years to come.



## Workflow process

Is your requester notified of the work order rejection or approval?



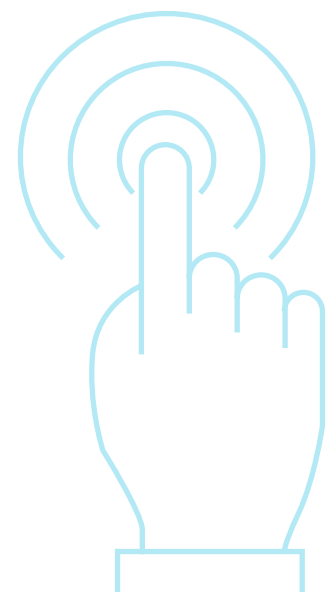
### Pitfall 3

## Your software is not user friendly

If you have a non-intuitive interface or software that is difficult to navigate through, then simple workflow processes can be severely disrupted. User uptake may decrease and the quality of information that your database captures will diminish. Software that is not easy to use is a primary reason for system failure in any organization and at the very least makes optimizing a system extremely difficult. Put simply, if processes are tricky to use and features hard to find they won't be used and the money you've dumped into a system is wasted.

### ✓ Solution

An obvious but costly solution is to ditch your confusing system and start fresh with a new more flexible platform. Often you can find less expensive options with simpler and more intuitive features. At the same time, we understand that most organizations don't want to start from scratch every time an issue arises. To proactively deal with your current system it will be important for you to invest in more training and follow the training steps outlined in Part 3 for a better support strategy moving forward. Make sure that all of your users are confident with key software functions. Then, select a smaller group of users to be able to complete more advanced tasks. Your software champion will play an important role in this process as they will have to field more questions from staff and make sure they stay on top of all system upgrades and features. Lastly, play around with your user permission settings. Make sure you have streamlined the permissions for each user, giving them access to things they need and hiding those things they don't. By modifying these settings, you can help to clean up an existing interface and give them less to look at or get lost in. Work with your vendor on changing these permissions or customizing your database to see if you can make it less flashy and more streamlined.





## Pitfall 4

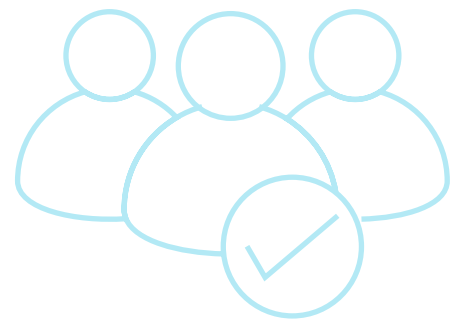
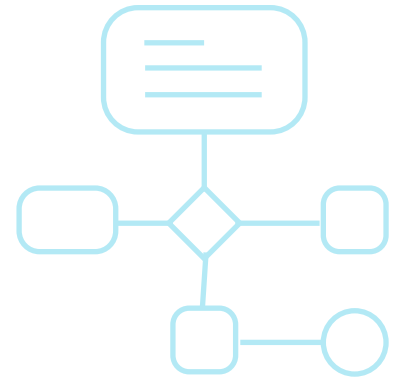
### Your workflow processes are inefficient

What happens after a user submits a work order request? Who closes out work orders after the job has been completed? Where does the work order go after it has been closed out? If you don't know the answers to these questions, then chances are your workflow processes aren't as efficient as they could be. By understanding the process from beginning to end and determining the unique roles and responsibilities of different members on your team, you will be able to identify areas of inefficiencies that require a fresh makeover. This allows your users to do their jobs more effectively and much more quickly.

#### ✓ Solution

First, map out your workflow process from beginning to end using the help of a flow chart. Establish which member(s) on your team are responsible for which step. At each step, ask yourself if this process is working and what can be done to improve it. Most importantly, determine what kind of feedback loop is in place to communicate outcomes back through the chain. Once you critically view the process, you can take steps to change it. An example of this may be to have better communication from the maintenance team to the original requester on job status and completion. Maybe, you find that maintenance techs in the field aren't utilizing the help of a mobile app to communicate the work they have completed or started. A common occurrence we find is much of the work that maintenance techs perform is in dead zones, or areas that lack wifi access. In these cases, printing out work orders or opting for a native mobile app would better match your workflow requirements.

Additional suggestions for more efficient work processes are to always utilize functions that are



built into the software for just this purpose. You would be surprised to see how many clients never use due dates, checklists or comment fields. All of these features work together to tighten up a process and come as standard features in maintenance management software packages, so use them! Lastly, you can run reports that allow you to easily allocate work hours for different tasks. These reports take the number of work hours in a week, the number of jobs to complete in the week, and the number of hours a job will take to craft an optimized work schedule for each of your maintenance techs. This report can keep you and your entire team on track with a just a few simple clicks.



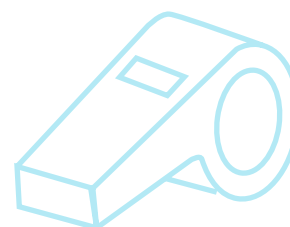
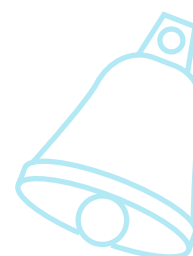
### **Pitfall 5**

### **Your system has too many bells and whistles that you have no idea how to use**

Often buyers can get roped into acquiring the latest, greatest and flashiest software on the market. Equipped with all sorts of dashboards and metrics, several types of mobile apps, the ability to customize everything, and hundreds of buttons to click, your system might be a little too sophisticated for its intended purpose.

### **✓ Solution**

As reiterated several times in this manual, simplicity is king. Know that you don't have to use all features at once and you can always choose not to implement a feature if your organization won't benefit from it. Stick to the features that you need like simple work order management, scheduling PM's, and tracking asset info. When your team is ready, begin to implement more features only if you find a need for them.



## Pitfall 6

### Your software is missing a crucial feature that your organization requires

Sometimes users will see a gap in the functionality a software offers and the feature that they require. Perhaps your needs assessment wasn't as in-depth as it should have been or maybe the needs of your company have changed since implementing your system. Regardless, it is important that your system meet expectations so that you can avoid double entry to another system.

#### ✓ Solution

If you are committed to your current software system then you may be in a “make it work” moment. There are special system workarounds that can be implemented by the vendor in order to make it work the way you need it to. These work-arounds are situational, usually requiring the help of the vendor support team to reconfigure the system in the backend. Although this tactic may not be as streamlined, they can definitely help to satisfy your need and are usually free of charge. A more expensive solution is to have your vendor custom create a feature for you. Working with the vendor's developer, new features can be custom built specifically for your business. If you are not the only client requesting this particular feature, the vendor may share the cost. Note that software customization can take a while as programming the code, structuring the navigation, testing the beta version and then deploying the feature to the client is an extensive process. Depending on the complexity of the customization this process can take a week to 6 months (or more). Before you throw in the towel with your current system, make sure you reach out to your vendor to discuss work-around options and software customization.



# Key takeaways

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## Post Purchase Timeline

In the months after launching your system, follow simple tasks to ensure the ongoing success and maintenance of your database.

### 1 | Short Term (3 weeks to 1 month)

- Assess strengths and weaknesses of system
- Make sure basic features are working for all users
- Add training sessions for users who are confused with the system
- Add new permissions to users who require more functionality

### 2 | Medium Term (1 to 2 months)

- Begin to generate maintenance history reports
- Understand the benefits of reporting for different users in your organization
- Undergo one or two training sessions to cover a variety of reporting examples

### 3 | Long Term ( 3 months +)

- Get better acquainted with all features of your software with frequent but short training sessions
- Keep up to date with new software upgrades by being in the know with your vendor
- Sign up for vendor newsletter and mail lists to have communication sent to you

## System pitfalls and how to avoid them

### 1 Pitfall | You've lost your software champion

- Re-appoint a new software champion to take over duties
- Have them sign up for training to get them up to speed quickly
- Ensure your vendor provides proactive support with regular check-ins
- Take advantage of free support resources provided by your vendor
- Ensure your vendor has at least 3 up to date contacts from your organization
- Recognize that your team is responsible for the quality of the data inputted into the system

### 2 Pitfall | Your database is full of outdated information

- Clean your database of clutter either internally or hire your vendor to do it for you
- Create a control system to keep your database clear of clutter using a "data removal person" and transparent communication process
- Make closing out work orders a mandatory policy in your organization

# Key takeaways

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## 3 Pitfall | Your software is not user friendly

- Ditch your confusing system and start fresh with a more intuitive one
- If you opt to keep your system, invest in more training for your entire organization
- Rely on your software champion to diffuse new system info to staff members
- Streamline your user permissions for each user

## 4 Pitfall | Your workflow processes are inefficient

- Map out your workflow process from beginning to end using the help of a flow chart
- Find process gaps and determine how to fix them and who is responsible for this process
- Find better ways to perform these functions
- Run reports to easily allocate work hours to tasks

## 5 Pitfall | Your system has too many bells and whistles that you have no idea how to use

- Know that you don't have to use all features a system has to offer
- Stick to basic features and slowly add on more advanced ones only if your organization will benefit from it

## 6 Pitfall | Your software is missing a crucial feature that your organization requires

- Speak with your vendor regarding work-arounds that they can do to make the software work for you.
- Speak with your vendor regarding software customization and don't forget to inquire if the vendor will share some of the cost

# Wrap up

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Choosing the right maintenance management software to meet your needs and your budget can be tricky. Streamline this process with thorough research, proper purchase and integration steps, a solid rollout strategy, and thoughtful post purchase follow up. Research should consist of a solid needs assessment and a structured shopping experience. After narrowing down your search and choosing the best product for your software needs, determine the type of setup that you will use based on important factors that affect this process. From there, rollout your new system to your entire team with comprehensive training. Continuously monitor your software workflow, making changes to the features used and software roles as you see fit.

If you are looking to optimize your current system, identify software pitfalls and learn how to avoid them by putting the right policies and people in place. Note that software never has to be complicated and that all processes should be kept as simple as possible. Create policies and procedures to ensure that your system stays clean and utilized. Don't be afraid to seek the support of your vendor, utilize their resources, ask them questions, and develop a solid relationship with their support team.

Maintenance management software is an excellent tool to help your entire teamwork more efficiently. When used properly and setup correctly, software can be leveraged as a key competitive advantage in your industry. Cost savings, workflow efficiency, departmental organization, less equipment downtime, and in-depth reporting are all realized with a comprehensive software system. A good system will stand the test of time, growing with you as your organization scales upwards and becomes more innovative as technological processes continue to advance.



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## About Hippo CMMS

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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.

### **Hippo CMMS**

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