COHESIVE
solutions

Drive Culture Change & Measure Performance

Utilizing Asset & Work Management Data

Company Highlights

Industry Best Practices
Deep industry subject matter expertise in business and work processes

IBM Maximo
One of the largest resellers and implementers of IBM Maximo in North America, with over 200 Asset and Work Management projects

Rich Industry Experience
Utilities, Oil & Gas, Manufacturing, Facility Management, Aerospace & Transportation, Nuclear

IBM's Highest Accreditation for Maximo
Largest body of certified Maximo consultants compared to any other IBM Partner

Performance Management
Award winning solutions that enable organizations to continuously improve and Achieve Operational Excellence

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Needs vs Reality

Maintenance & Reliability **needs**…

- Clear **vision** and understanding of how work on assets benefits the bottom line
- Tools, Training, and Systems that make day-to-day operations **easier**
- Documented **processes** & expectations for performance.
- Enterprise **solutions** that reduce effort & frustration.


The **reality** for boots on the ground…

- Asset data and processes are not documented or easily available to **enable** performance.
- Multiple systems in place, creating many points of entry or use, in order to attempt day-to-day **success**.
- Confusion and frustration mount due to individual scrutiny, misaligned goals, and/or a lack of clear **objectives** and resources.

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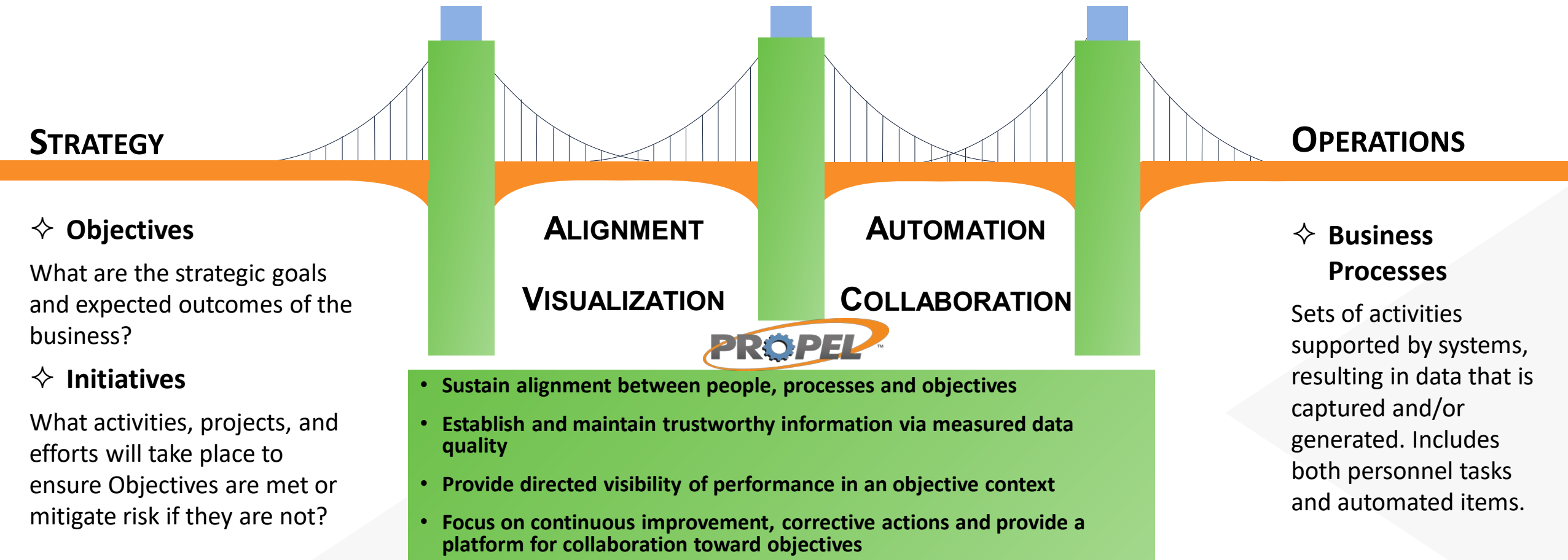
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Line of Sight

End-to-End Focus

- Clear connection between organizational objectives & operations
  - Measures guiding the process to support the objectives
  - Specific tasks or initiatives steering day-to-day tasks.

- An employee's ability to identify how they fit into and/or contribute to the expected performance & mission of the organization.
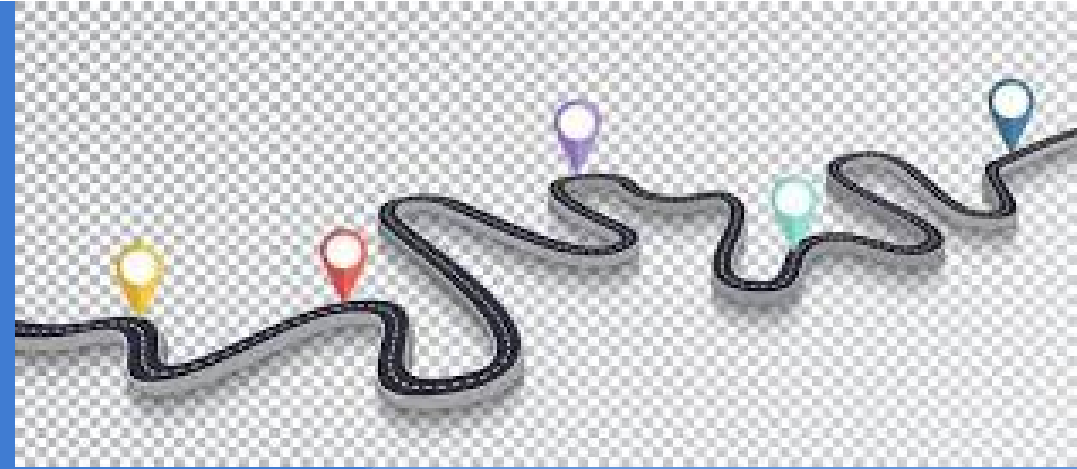
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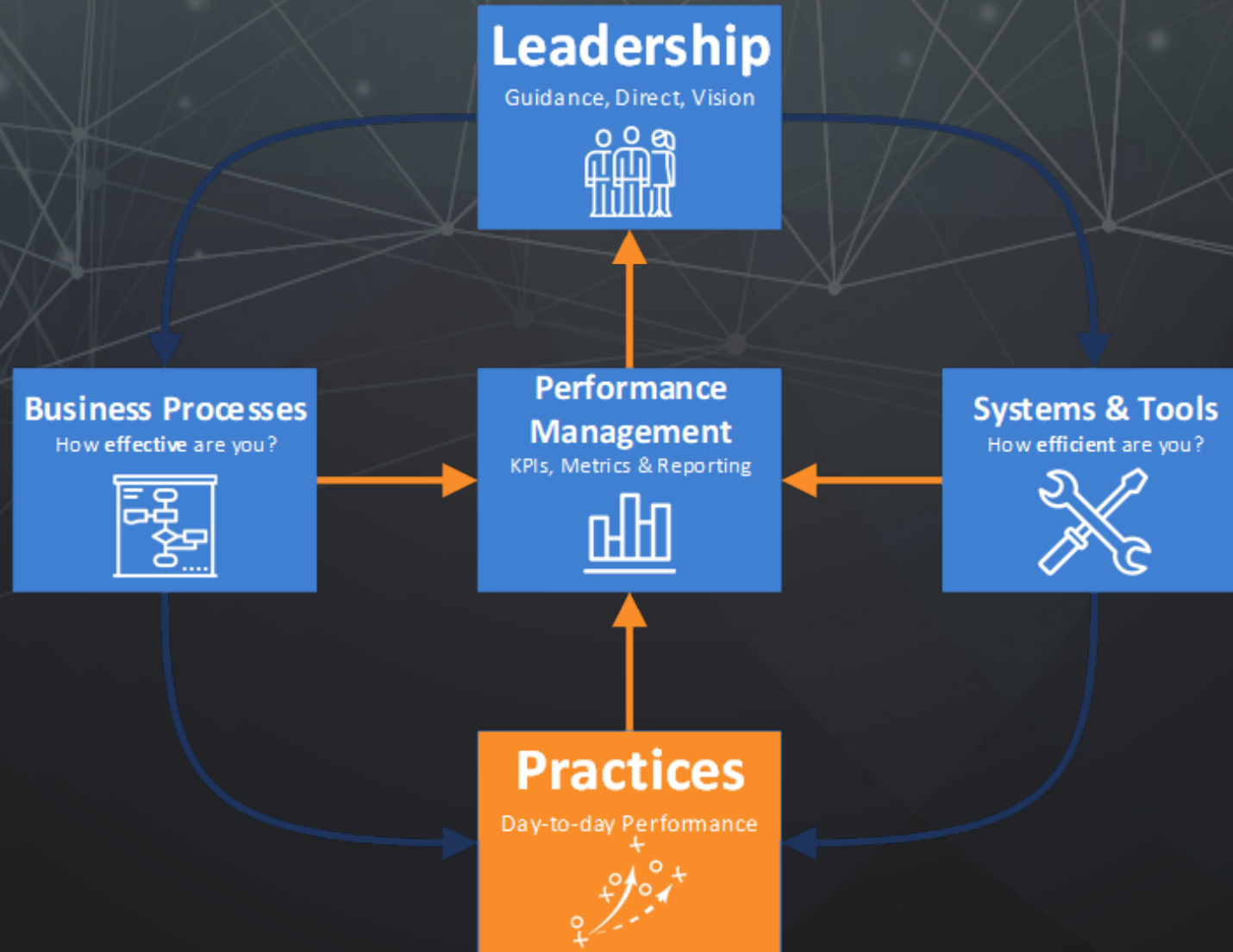
Bridging the Gap

- Performance Management is an ***objective-driven*** process used by high performing organizations that focuses on the health and management of key ***business processes*** to ensure organizational ***alignment and effectiveness*** in execution.

- Operational Excellence is challenging when there is a **gap** between Strategy and Operations.
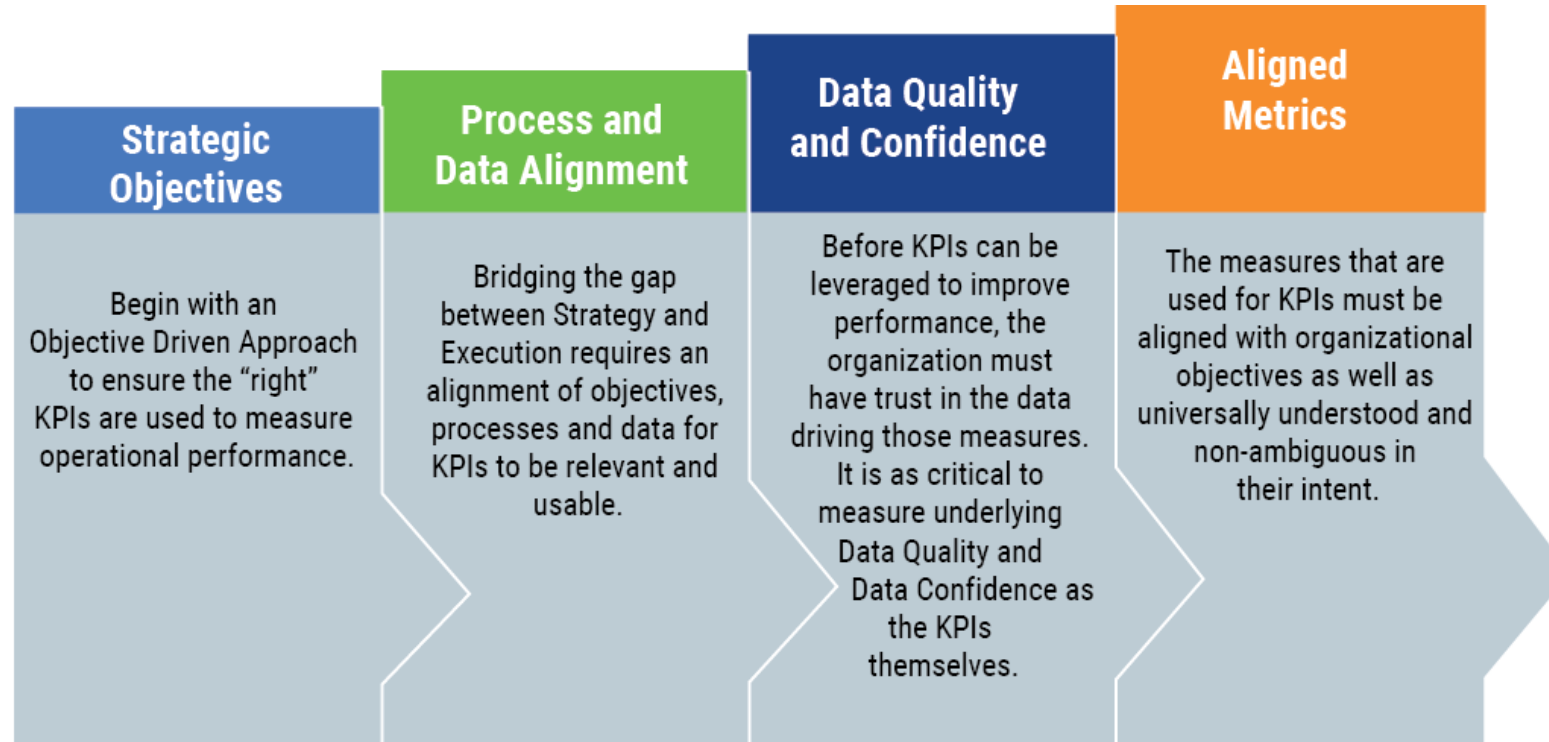
STRATEGY

OPERATIONS

ALIGNMENT

AUTOMATION

VISUALIZATION

COLLABORATION

✧ **Objectives**

What are the strategic goals and expected outcomes of the business?

✧ **Initiatives**

What activities, projects, and efforts will take place to ensure Objectives are met or mitigate risk if they are not?

✧ **Business Processes**

Sets of activities supported by systems, resulting in data that is captured and/or generated. Includes both personnel tasks and automated items.

PROPEL™

- Sustain alignment between people, processes and objectives

- Establish and maintain trustworthy information via measured data quality

- Provide directed visibility of performance in an objective context

- Focus on continuous improvement, corrective actions and provide a platform for collaboration toward objectives

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Beginning a Journey

Important destinations along the way

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Initiation & Strategic Planning

Strategic Objectives

Begin with an Objective Driven Approach to ensure the "right" KPIs are used to measure operational performance.

Process and Data Alignment

Bridging the gap between Strategy and Execution requires an alignment of objectives, processes and data for KPIs to be relevant and usable.

Data Quality and Confidence

Before KPIs can be leveraged to improve performance, the organization must have trust in the data driving those measures. It is as critical to measure underlying Data Quality and Data Confidence as the KPIs themselves.

Aligned Metrics

The measures that are used for KPIs must be aligned with organizational objectives as well as universally understood and non-ambiguous in their intent.

| Core Team	Assessment	Objectives	Data Analysis, Quality, Confidence	Change Management & Communication

Initiation

- Communication of the performance management effort is key
- Set initial expectations to monitor only the performance items that support prioritized objectives
- Assess the current state of the organization
  - Existing measures
  - Data sources
  - Documented processes
- Develop plans for
  - Change Management
  - Communication
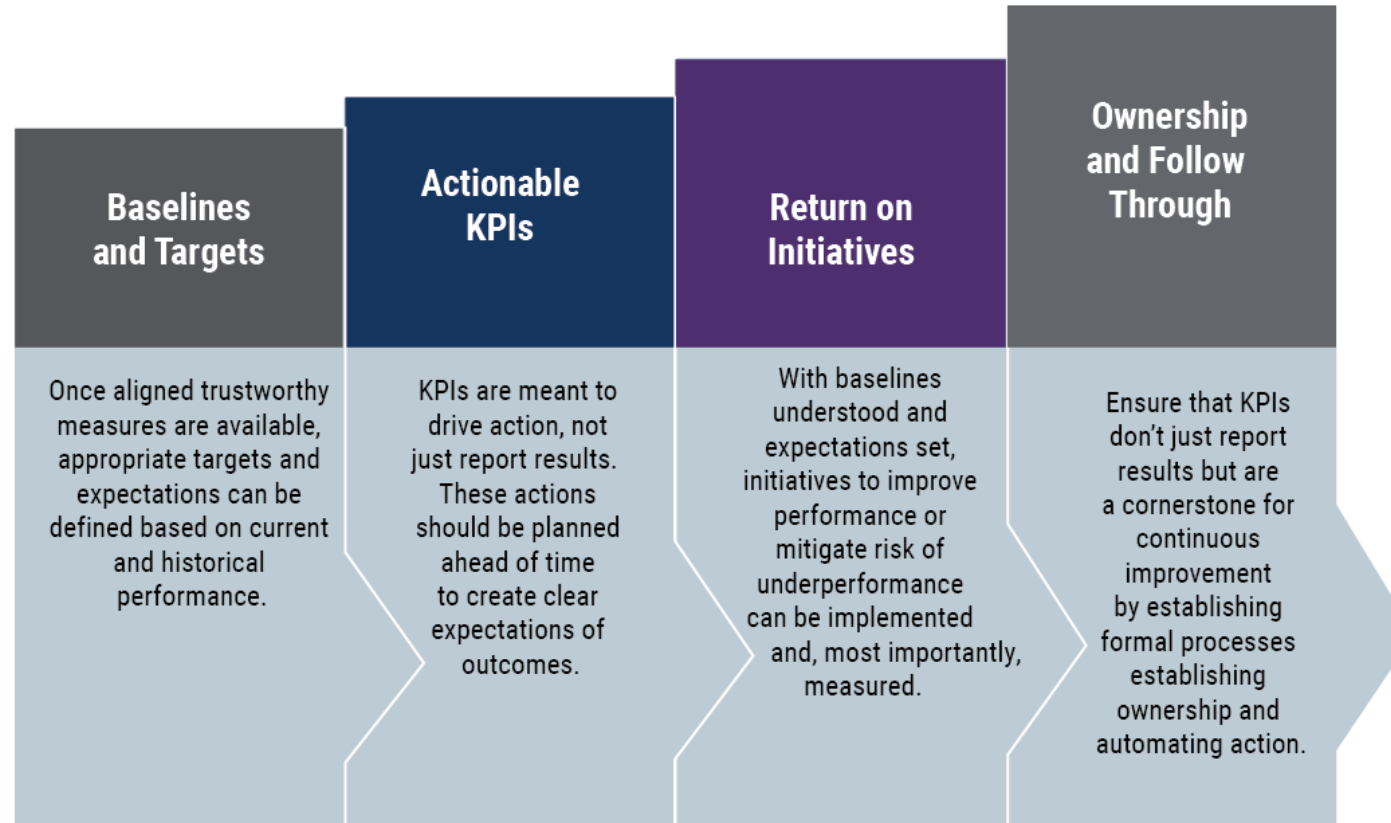- Provide a single source of performance management truth (Data)
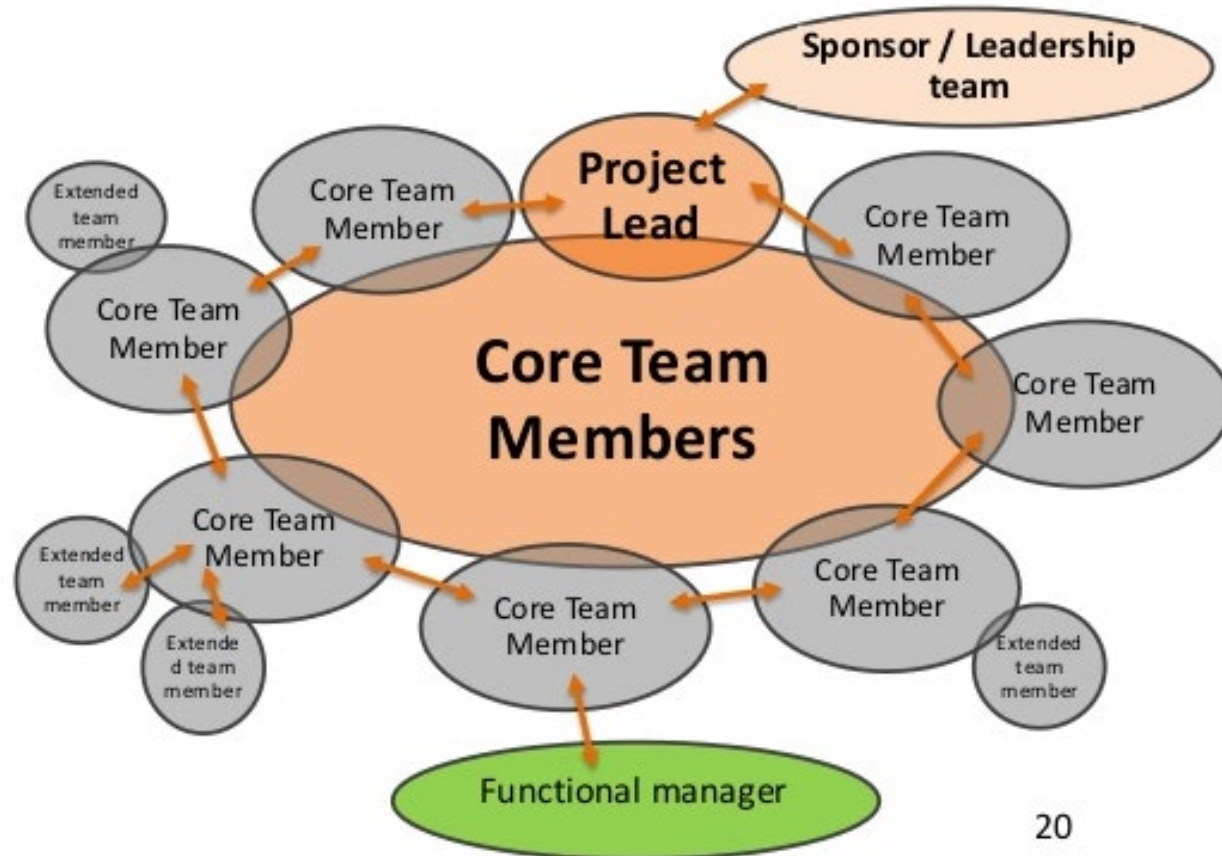
Strategic Planning

- Create Asset Management Strategic Objectives that support the Organization's Mission, Vision, and Values.
- Identify supporting objectives and measures that align specific data and processes to objectives
- Document initial thoughts on what defines performance for the identified objectives
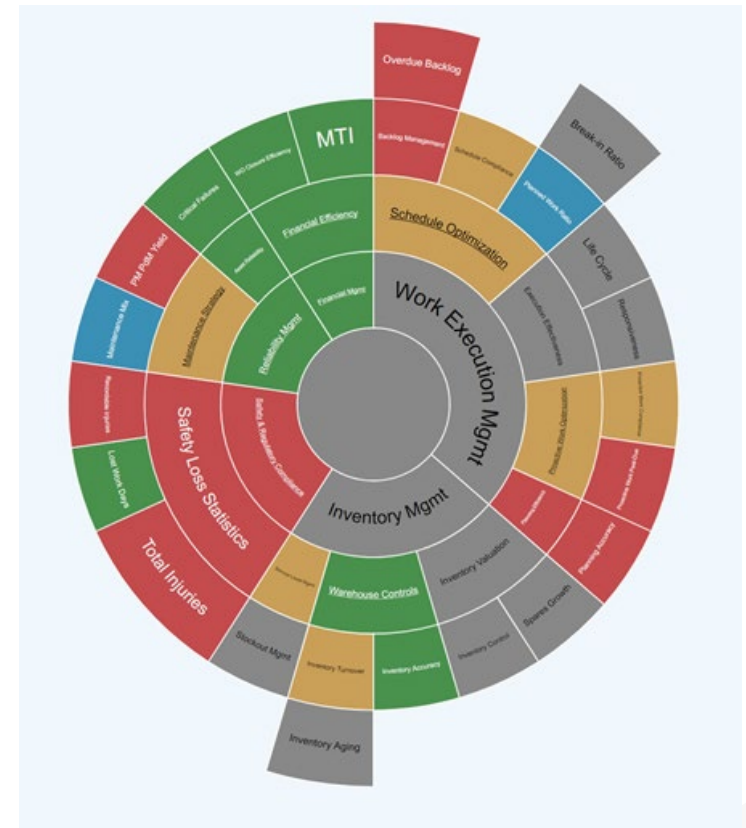
- **Work Execution Management**
  - Work Order Lifecycle & Aging

- **Reliability Management**
  - PM Performance

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Configuration & Operationalizing Performance

Baselines and Targets

Once aligned trustworthy measures are available, appropriate targets and expectations can be defined based on current and historical performance.

Actionable KPIs

KPIs are meant to drive action, not just report results. These actions should be planned ahead of time to create clear expectations of outcomes.

Return on Initiatives

With baselines understood and expectations set, initiatives to improve performance or mitigate risk of underperformance can be implemented and, most importantly, measured.

Ownership and Follow Through

Ensure that KPIs don't just report results but are a cornerstone for continuous improvement by establishing formal processes establishing ownership and automating action.

Goals & Targets

Prioritize Metrics

Long Term Roadmap

Define, Measure & Communicate Performance

Continuous Improvement Cycles

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Configuration

- Perform data analysis via the CMMS/EAM or other enterprise systems

- Define quality & confidence for data

- Identify data alignment to potential measures and objectives.

- Create definitions and why statement for metrics

- Communicate throughout the organization before & along the implementation of the metrics

- Gather cross-functional input to set initial targets and goals.

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Example Objectives/Metrics

Work Execution Management

- ## Workorder Lifecycle & Aging

Average duration of work from Initiation through Closure

Supports Customer Service Level and Work Prioritization

- Time Period bucketing was by ACTUALFINISH date meaning work is completed in the period (Month)
- Specific Work types excluded
- Average Time in individual phases included as Data Dimensions

Reliability Management

- ## PM Performance

Proactive Work Due Date Compliance

Supports Failure Reduction and Asset Criticality

- Shown as percentage
- Compliance was defined as work orders completed between:
  - The target start date and the sum of (target start date + 10% of the PM frequency).
- Includes only work order types that define PM

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Operational Performance & Improvement

- With availability of defined data and objectives, monitoring of targets & expectations can be automated
- Benchmarks should be noted and communicated.
- Change Management and Continuous Improvement are embedded into the Core Team operational strategy
- Performance measures processes, not people
- Establish ownership and frequency of key performance review activities
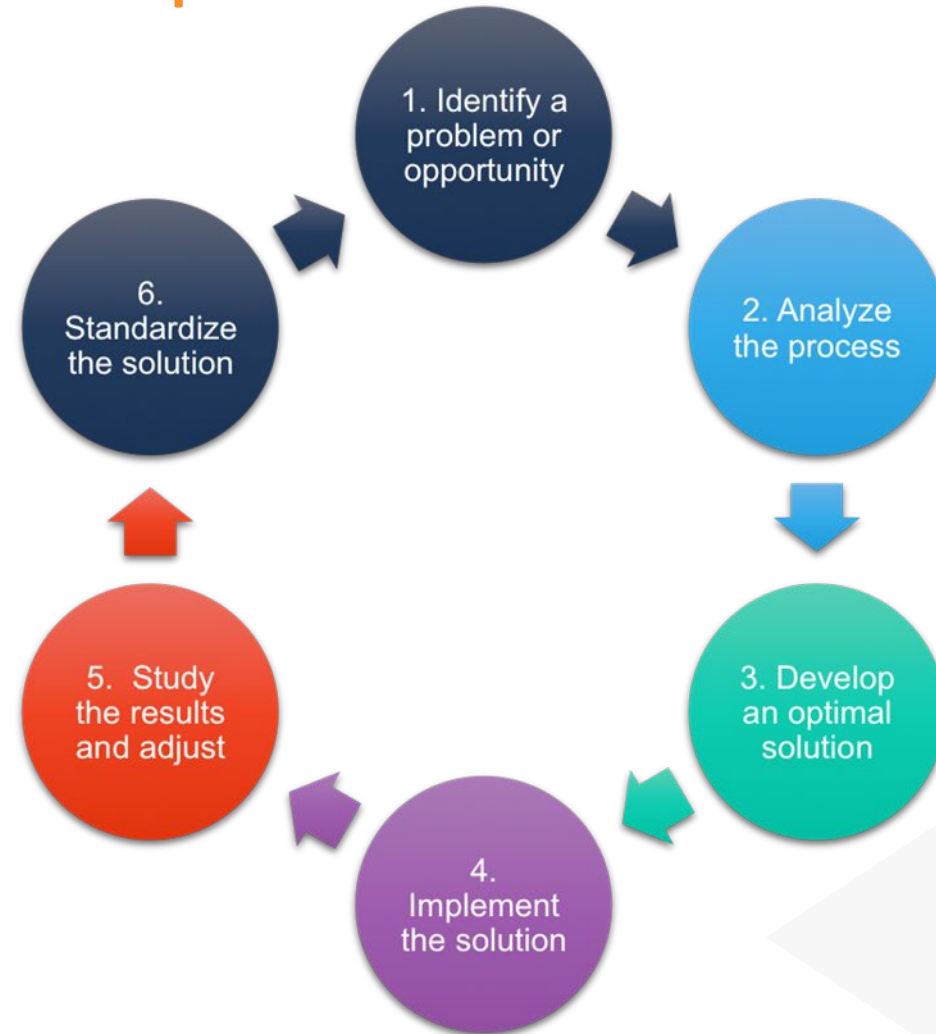
Key Points

- Leadership can be from the top, or from within, but leadership is required.
- Executive sponsorship is key, if an executive does not initially sponsor the effort, a strong champion or team must engage and secure this.
- The presence of data does not provide metrics or performance, it must have quality and confidence and be aligned to objectives.
- Systems are tools to support processes and make people more efficient, they are not solutions on their own.
- Documented & communicated processes are required.
- All items, metrics, terms, etc. must be simply defined and well understood in order to be used in performance management.
- Line of Sight is a critical element to enable people to perform.
  - Remember this – You can *enable* performance, you cannot mandate it.

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Networking

Find us at these upcoming events

- MaximoWorld in Orlando, FL August 5-9
- SMRP Annual Conference Louisville, KY October 28-29
- Xcelerate19 Fort Myers, FL November 13-15

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