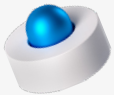


A short guide to
**buying the
right CMMS**

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Introduction

Take control of your maintenance

Choosing the right [CMMS](#) could mean the difference between getting your maintenance under control and wasting a lot of time and money. That's why it's crucial to choose a CMMS that's a good fit for your operation.

There's a lot of [maintenance software](#) out there, so it can be easy to feel lost or overwhelmed when choosing a CMMS. But fear not! We've highlighted some surefire strategies for evaluating maintenance software so you can get organized fast and find the best CMMS for your team.

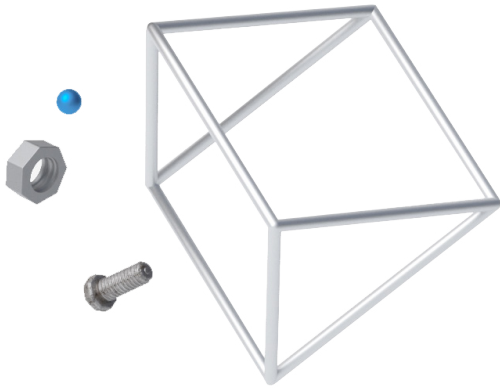
How to use this guide

The phases outlined below will help you know how to go about choosing a CMMS that fits your business, budget and maintenance operation:

- 1 First, we look at how to consult key stakeholders and get buy-in from your team.
- 2 Next, we'll help you understand your goals so you can focus your search.
- 3 Finally, we'll guide you through the process of evaluating CMMS software for fit, cost, features, and implementation.

Chapter 01

Assemble your team



Consulting the right people in the early stages of your research will help you get one step closer to choosing a CMMS based on a more holistic approach to maintenance. It's important to think about each person who will interact with the software, how they feel about adopting a new process and what they need in a CMMS. This section outlines who to bring together and how, so you can get buy-in and ensure key stakeholders are on the same page.

Who should be consulted when choosing a CMMS

System administrators and maintenance managers: These folks will be overseeing the daily use of the CMMS, so it's super important to get them involved early in the process to help get buy-in and improve adoption of the system.

Technicians These are the people who will be using the CMMS the most, so their opinion on features, usability and the openness to adopt software are crucial.

Ch. 01 Assemble your team

Operators Operators play a big part in the work order and work request process, which is why their input should be considered.

Reliability engineers They're key to using a CMMS to its full potential and running a great preventive maintenance program.

Inventory managers Inventory management is a huge part of a CMMS's function, which is why inventory managers should be consulted when selecting one.

Health and safety personnel These team members are especially important to talk with if your industry is heavily audited.

IT team They'll have a lot of insight into if and how a CMMS can mesh with your facility's existing technology infrastructure.

Executives CEOs, CFOs, and other leaders often use CMMS software to make data-driven decisions about a company's future.

Questions for getting stakeholder insight and buy-in

Answer the question "What's in it for me?" for every system user. Ask everyone who is impacted by a CMMS how they envision using the software and any challenges they foresee in adopting it.

Will your **organizational culture** support the move to a CMMS? Buy-in, from top to bottom, is extremely important to a successful CMMS implementation. Identify any opposition to maintenance software and come to a solution for these concerns.

What systems, processes and resources can make CMMS adoption easier? It's vital to educate and enable everyone at your facility so they understand the value of a CMMS.

Ch. 01 Assemble your team

Building an [asset management policy](#), sharing helpful articles, and including stakeholders on demos and free trials are some ways to achieve this.

Choosing a CMMS that's best for your team

A CMMS is only as effective as the people who use it. If the software doesn't have the tools your team needs or users refuse to adapt to a new way of doing things, your investment will be for nought. That's why it's important to decide who should be consulted when choosing a CMMS and what they need out of maintenance software. With this insight, you can evaluate different options with a well-rounded view of how a CMMS will affect your operation.



Chapter 02

Define your goals

You can't find the right solution if you don't know which problems you're facing. The hunt for a CMMS begins with defining the problems you want to solve and establishing short and long-term goals.



Questions for defining your goals:

- 1 What are the long-term goals of your maintenance department and company?
- 2 What is the biggest problem or frustration for your maintenance team?
- 3 What **KPIs** or goals are you concerned about achieving?
- 4 Does your operation have multiple sites? How many assets and parts do you have?
- 5 What **maintenance strategy** do you use now and what do you want to use in the future?
- 6 What is your maintenance team's daily workload?
- 7 What health and safety regulations does your company need to comply with?

Ch. 02 Define your goals

Tips for understanding your goals

Talk to decision-makers in your company about how they define short and long-term success and where they see your industry going.

Quantify your performance as much as possible, identify weaknesses (such as too much downtime or unplanned maintenance), and find out what's causing these weak points.

Audit your maintenance systems and processes. Figure out what works well and what doesn't. Talk to your maintenance team about the daily obstacles they face.

Create a list of your top five goals for the next one, three and five years.

What CMMS will help you achieve your goals?

It's too early to choose the best CMMS, but this process helps you discover if you even need one. Your current solution might be sufficient, especially if your operation is small, successful, and able to scale for the future. On the flip side, this part of the process will make it clear if there's a technology gap on your maintenance team, and set you down the path of filling that gap.



Chapter 03

Evaluate your CMMS options

Until now, we've been taking the 10,000 foot view of choosing a CMMS. The following sections will bring you down to earth so you can examine the details of each software option, from the way it fits your facility to how much it costs, what features it has, and how it can be implemented.

Choosing a CMMS that fits your requirements

These questions and tips can help you narrow the playing field and identify a handful of solutions that could help you

meet your goals (we'll talk about whittling this list down even more in the next step).

Questions to help define your requirements

- 1 What is the most you can spend, annually, on a CMMS?
- 2 Are you able to measure the performance of your assets?
- 3 What is your timeline for purchasing and implementing a CMMS?
- 4 Do you have IT resources and systems that could support an on-premise CMMS?
- 5 What systems and processes are in place to support the adoption of new software?

Tips for establishing your requirements

- 1 Outline a five-year budget for the CMMS to see what you can realistically spend.
- 2 Take inventory of your assets and assess **criticality**, failure modes, and ability to integrate with technology.
- 3 Set a deadline for choosing and implementing a system. Outline what you want to achieve in the first 30, 60 and 90 days.
- 4 Talk to you IT team about the ability of your facility to install on-premise or cloud-based software.
- 5 Examine any existing SOPs, policies, communication channels, and other systems and processes. List any updates or new resources necessary for CMMS adoption.

- 6 Try answering the question, “What’s in it for me?” for each person who will interact with the software. This includes maintenance managers, technicians, operators, reliability engineers, inventory managers, health and safety personnel, and executives.

Which CMMS meets the needs of your operation?

By now, you should have a clearer picture of what you want in a CMMS. At this point, you can eliminate any option that is not financially realistic and determine whether on-premise or **cloud-based** is the ideal solution for you. If you don’t have the resources to implement an on-premise solution, such as in-house IT support, you can remove that option from your list.



Understanding the true cost of a CMMS

Most CMMS platforms [save you money long-term](#), but the right one will help you maximize ROI now and as your company grows. This section helps you get to the true cost of software so you can find the best CMMS.

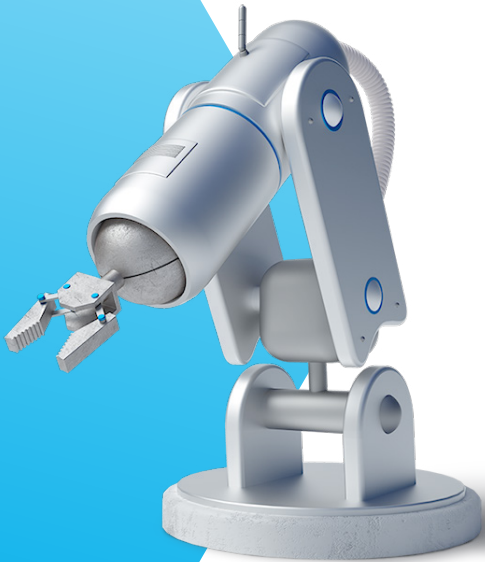
Questions for understanding the cost of a CMMS

- 1 What is your budget for a CMMS? What factors will influence this number in the future?
- 2 How many people will use the CMMS and how will this number grow over five years?
- 3 What KPIs will be used to gauge return on investment?
- 4 What is the total cost of each CMMS option (purchase, subscriptions, training, support, and upgrades)?

- 5 What are the pricing structures of each CMMS option? Is pricing flexible or are you locked into a contract?
- 6 What are the indirect costs of each CMMS option? (time, IT infrastructure, new hires)?

Tips for understanding the cost of a CMMS

- Free CMMS platforms exist and many providers offer free versions of their CMMS software. However, there are often limits on users, assets, work orders, features and support. Understand these limits and how they affect your operation when choosing a CMMS.
- Because most [CMMS pricing](#) structures are based on the number of users, it's important to know [who will be using the system](#) and how this number will grow in the future.



- Make sure you understand the cost of setup, IT infrastructure, support, training, upgrades, integrations, equipment (such as extra hardware or mobile devices like tablets), and the time it will take to properly implement the system. Some CMMS providers include support in the subscription cost and some don't. Unexpected support and implementation costs can easily derail your budget.
- Using maintenance software often leads to saving money elsewhere, such as inventory and labour. The metrics you use to quantify the value of your CMMS will help you settle on a budget

and define which features are worth the cost.

Choosing a CMMS for your budget

Here's where you can really start whittling down the choices. A CMMS is likely out of the running if it costs more than your budget. Same goes for a CMMS that isn't financially sustainable as your organization grows.

Assessing features and benefits of a CMMS

Every CMMS has dozens of features with different levels of capability and customization. Simply reading a list of all the tools won't get you any closer to

Ch. 03 Evaluate your options

choosing a CMMS that's best for your operation. This section helps you evaluate CMMS features strategically and identify which software is the best fit for your operation.

CMMS features scoring template

Our comprehensive CMMS features scoring template can help you evaluate each CMMS provider on their available features, their value, and how they perform based on your facility's goals and priorities. [Download our CMMS features scoring template](#) to easily compare the features of different CMMS options and whether they meet your wants and needs.

Other things to consider when evaluating CMMS features

- 1 Don't hesitate to contact a provider if you have questions about a feature. They can explain if it's available and what it looks like in action.
- 2 Check to see if each CMMS option has a mobile version. A mobile CMMS app allows you to do work on the go and can be an extremely valuable tool.
- 3 Think about other systems that need to integrate with your CMMS (such as software systems in other departments) and find out if those integrations are possible with each option.
- 4 Each tier of CMMS pricing comes with additional features. Make sure the features you're evaluating are available in the tier that fits your budget.

Ch. 03 Evaluate your options

- 5 Some CMMS providers let you customize certain features, like dashboards or reports. Find out if each solution offers that option.
- 6 Be realistic. You might need or want a certain feature, but it doesn't mean you will be able to use it successfully with available resources and expertise.
- 7 Think about features outside the CMMS platform, such as training and support.

Which CMMS provides the most value for money?

Any CMMS that scores far less than other candidates on the evaluation chart should be removed from your list. You might be tempted to keep some of the lower-scoring options if they cost less. However, if they don't have the features you need, they won't end up being worth the

investment at any price. Trim your list of CMMS front-runners to the top two to five. The next step is to see if any of your finalists are too good to be true. That's the question we're looking to answer in our next section.

Defining the scope of your CMMS implementation

Choosing a CMMS is not just about the numbers. Yes, pricing and features matter, but the human factor must also be considered when choosing the best CMMS. This section explores how you can navigate the human element when choosing a CMMS.



Five things to consider for CMMS implementation

- 1 How easy is it to use the CMMS? Technicians, operations, and others won't use the software properly (or at all) if it isn't user-friendly. Ask CMMS vendors for a free trial and discover for yourself how easy it is to operate.
- 2 What do the [implementation](#), training and support processes look like? You and your team are you're going to need help setting up and using the software. Research how much assistance is offered by CMMS providers for setup, training, and support resources (digital help centre, training videos, customer support, etc.).
- 3 What can go wrong? The road to CMMS success won't be without its challenges. Knowing what

obstacles lay ahead will help you prepare for them. Ask CMMS providers about the [common challenges](#) of implementing their system. Talk to companies that use the software and ask about any obstacles they faced.

- 4 What's next? Determine what the next steps would look like if you settled on a CMMS tomorrow. Think about who needs to be notified and establish a timeline for implementation.
- 5 What happens after implementation? Implementing software is only the beginning of your journey to CMMS success. You need to decide how to track results, ensure the system is being used properly, onboard new employees, and scale for growth. Ask potential vendors about support and resources they offer past implementation.

Chapter 04

Choosing your CMMS

Which CMMS is the winner?

This is the end of the road. The final act. Decision time. You have done your research, asked the right questions and talked to everyone you need to. The final call comes down to choosing a CMMS to address your most pressing short and long-term business needs, with the services and the team to support you through the transition.

The Bottom Line

Choosing a CMMS can seem scary at first. Staring at dollar signs and thinking about implementation for weeks on end can be one big headache. When it all seems too much, just take a deep and follow three simple steps:

- 1 Consult key players while getting buy-in
- 2 Define your goals
- 3 Evaluate the software based on fit, cost, features, and implementation.

With all this information and insight, the storm clouds will part and you can be sure that the CMMS you select is the best fit for your operation.



Learn more

Visit www.fiixsoftware.com for information on getting the most from maintenance software and other tips for maintenance professionals.

Visit our case studies page to see how other organizations have benefited using CMMS software, at www.fiixsoftware.com/resources/case-studies.

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