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## **AIM first: Aligning your organization for a successful CMMS implementation**

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**Accelix™**  
Webinar Series



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- Conduct assessments, analyses, workshops, training, consulting
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# Presentation objectives

1. Define AIM and general AIM principles (*AIM stands for “Align, Integrate, Monitor/Measure”*)
2. Provide insight into early CMMS initiative pitfalls that AIM addresses
3. Illustrate the SMART approach to CMMS implementation for establishing cause-effect strategic value
4. Present ideas about what should be done about avoiding the pitfalls



## POLL QUESTION No. 1

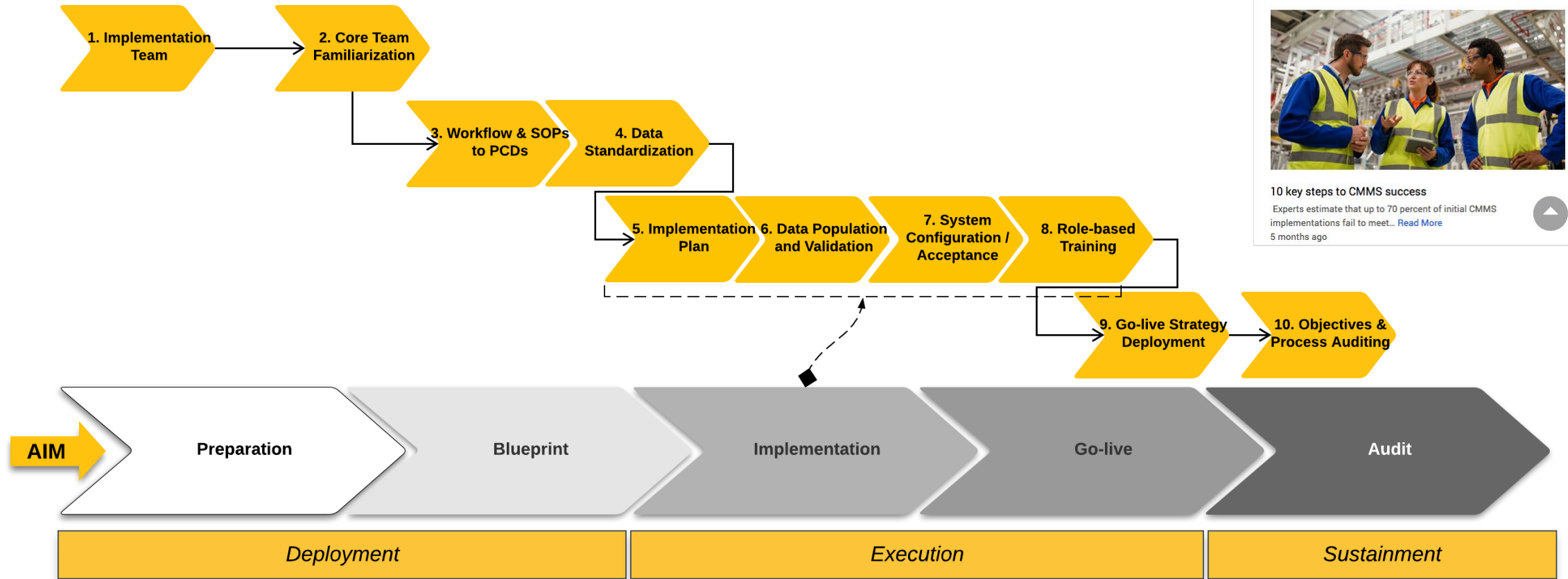


Which description below best portrays how you view a CMMS?

(Click only one answer)

- A convenient alternative to requiring controlled processes
- A tool used as part of a strategic program or multiple programs
- A strategic program in itself
- RCM software
- A maintenance and reliability database

# AIM and the 10 keys to CMMS implementation success



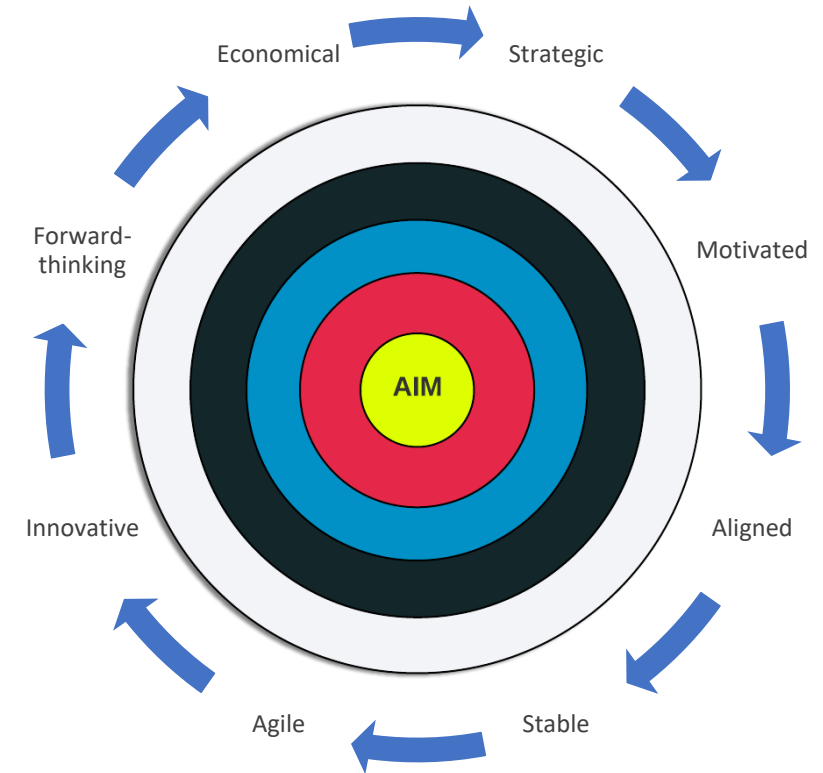
For more information watch: <https://www.accelix.com/community/predictive-maintenance/10-key-steps-to-cmms-success/>

# AIM description and attributes

## AIM description

AIM can be described as the *mission before the mission* that targets firmly establishing strategic business alignment (called strategic direction), the justification, and the motivational drive that warrants executive-level sponsorship to commit required resources to carry through a specific course of action to achieve strategic organizational ends. Taking AIM means setting up to achieve maximum value and to realize investment returns deserving of the coming effort.

## AIM attributes

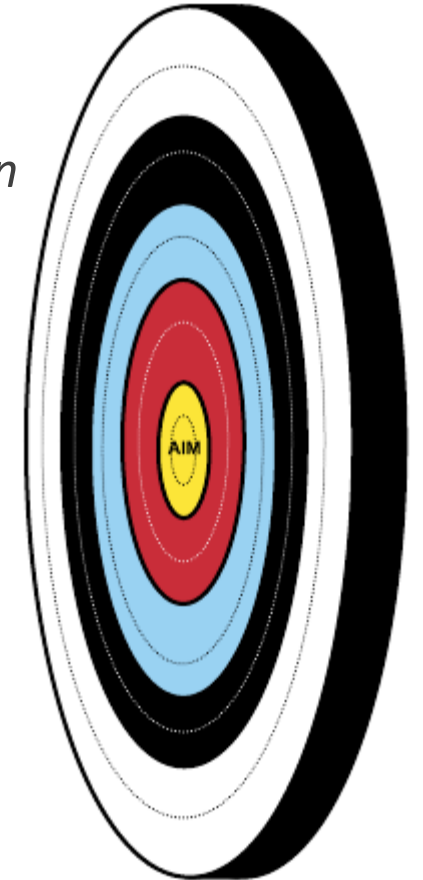


**AIM should carry the CMMS initiative through the coming deployment challenges with a robustness of sponsor discipline for conducting thorough upfront due diligence.**

# AIM viewpoint: strategy & mission

AIM means getting the CMMS initiative strategy and mission SORTED out...

- **Strategically focused** – *Implements a capability that is required to achieve the mission*
- **Objective driven** – *Mission is attainable in an expedient timeframe*
- **Resource conscious** – *Demands for resources are allocated and positioned to deploy*
- **Technically feasible** – *Knowledge is acquired and required assets are capable*
- **Economically viable** – *All things considered it must make financial business sense*
- **Drivers justified** – *Opportunities address viable needs*



What is **true** for the strategy-driven organization must also be **true** for the CMMS project.

# CMMS implementation challenges addressed by AIM

- Attracting buy-in
- *Keeping* buy-in that may sometimes be fleeting
- High incidence of CMMS initiative failure<sup>1</sup>
- A variety of mid-project *threats* that delay, postpone, derail, cancel or cause it to burn or “fizzle” out
- Resource deficits that crop up mid-initiative and their causes
- Significant scope creep and value erosion root causes
- Principles explain the “mystery” of internally rooted project threats (organizational weaknesses)

1. Failure in AIM context doesn't mean that the CMMS won't get implemented or operate, it simply means the CMMS at best, fails to provide expected value.



# SMART principles review

- **Specific** – Success criteria for the business activity is focused and tangible
- **Measurable** – The activity can be quantified by at least one of any number of measurement facets (example: effectiveness, timeliness, quality, etc.) [expected vs. actual]
- **Attainable** (or achievable) – The mission of the activity is attainable in the expected timeframe
- **Relevant** – The measures of the activity target the achievement of the organization's strategic mission to achieve its goals
- **Time-bound** – A predetermined time period or interval provides the constraint of time by which goals are to be met or interim progress is tracked

# Highlights from the Standish Group "Chaos" Report (2014)

The latest available and widely-trusted research conducted by The Standish Group published in their 2015 Chaos Report paints a dismal picture when it comes to enterprise software project failures. Here are some "highlights"...

In the United States, we spend more than \$250 billion each year on IT application development of approximately 175,000 projects. The average cost of a development project for a large company is \$2,322,000; for a medium company, it is \$1,331,000; and for a small company, it is \$434,000. A great many of these projects will fail. Software development projects are in chaos, and we can no longer imitate the three monkeys -- hear no failures, see no failures, speak no failures.

The Standish Group research shows a staggering 31.1% of projects will be cancelled before they ever get completed. Further results indicate 52.7% of projects will cost 189% of their original estimates. The cost of these failures and overruns are just the tip of the proverbial iceberg. The lost opportunity costs are not measurable, but could easily be in the trillions of dollars. One just has to look to the City of Denver to realise the extent of this problem. The failure to produce reliable software to handle baggage at the new Denver airport is costing the city \$1.1 million per day.

| Project Impaired Factors                  | % of Responses |
|---|----------------|
| 1. Incomplete Requirements                | 13.1%          |
| 2. Lack of User Involvement               | 12.4%          |
| 3. Lack of Resources                      | 10.6%          |
| 4. Unrealistic Expectations               | 9.9%           |
| 5. Lack of Executive Support              | 9.3%           |
| 6. Changing Requirements & Specifications | 8.7%           |
| 7. Lack of Planning                       | 8.1%           |
| 8. Didn't Need It Any Longer              | 7.5%           |
| 9. Lack of IT Management                  | 6.2%           |
| 10. Technology Illiteracy                 | 4.3%           |
| Other                                     | 9.9%           |

Currently, the 365 companies have a combined 3,682 applications under development. Only 431 or 12% of these projects are on-time and on-budget.

| Cost Overruns | % of Responses |
|---------------|----------------|
| Under 20%     | 15.5%          |
| 21 - 50%      | 31.5%          |
| 51 - 100%     | 29.6%          |
| 101 - 200%    | 10.2%          |
| 201 - 400%    | 8.8%           |
| Over 400%     | 4.4%           |

| Time Overruns | % of Responses |
|---------------|----------------|
| Under 20%     | 13.9%          |
| 21 - 50%      | 18.3%          |
| 51 - 100%     | 20.0%          |
| 101 - 200%    | 35.5%          |
| 201 - 400%    | 11.2%          |
| Over 400%     | 1.1%           |

On the success side, the average is only 16.2% for software projects that are completed on-time and on-budget. In the larger companies, the news is even worse: only 9% of their projects come in on-time and on-budget. And, even when these projects are completed, many are no more than a mere shadow of their original specification requirements. Projects completed by the largest American companies have only approximately 42% of the originally-proposed features and functions. Smaller companies do much better. A total of 78.4% of their software projects will get deployed with at least 74.2% of their original features and functions.

| Project Success Factors            | % of Responses |
|------------------------------------|----------------|
| 1. User Involvement                | 15.9%          |
| 2. Executive Management Support    | 13.9%          |
| 3. Clear Statement of Requirements | 13.0%          |
| 4. Proper Planning                 | 9.6%           |
| 5. Realistic Expectations          | 8.2%           |
| 6. Smaller Project Milestones      | 7.7%           |
| 7. Competent Staff                 | 7.2%           |
| 8. Ownership                       | 5.3%           |
| 9. Clear Vision & Objectives       | 2.9%           |
| 10. Hard-Working, Focused Staff    | 2.4%           |
| Other                              | 13.9%          |

Another key finding of the survey is that a high percentage of executive managers believe that there are more project failures now than five years ago and ten years ago. This despite the fact that technology has had time to mature.

|                              | Than 5 Years Ago | Than 10 Years Ago |
|------------------------------|------------------|-------------------|
| Significantly More Failures  | 27%              | 17%               |
| Somewhat More Failures       | 21%              | 29%               |
| No Change                    | 11%              | 23%               |
| Somewhat Fewer Failures      | 19%              | 23%               |
| Significantly Fewer Failures | 22%              | 8%                |

| Project Challenged Factors                  | % of Responses |
|---|----------------|
| 1. Lack of User Input                       | 12.8%          |
| 2. Incomplete Requirements & Specifications | 12.3%          |
| 3. Changing Requirements & Specifications   | 11.8%          |
| 4. Lack of Executive Support                | 7.5%           |
| 5. Technology Incompetence                  | 7.0%           |
| 6. Lack of Resources                        | 6.4%           |
| 7. Unrealistic Expectations                 | 5.9%           |
| 8. Unclear Objectives                       | 5.3%           |
| 9. Unrealistic Time Frames                  | 4.3%           |
| 10. New Technology                          | 3.7%           |
| Other                                       | 23.0%          |

Source: Project Smart: <https://www.projectsmart.co.uk/white-papers/chaos-report.pdf>

# Critical-thinking questions to ponder

- How is it that so many projects get derailed and what is the root cause?
- In reactive organizations, what can happen to the momentum of the project when it sporadically gets placed on the “back burner”?
- What could cause a project have its funding pulled, resources reassigned, be postponed or be cancelled altogether?
- Why do project resource deficits still occur even when reasonably well planned and scheduled?
- What is the project environment like when senior managers expect the clock to start ticking toward implementation as soon as the project is approved while key resources are not yet sufficiently available and are scheduled to other tasks at least for the next coming weeks?
- If overtime is already out of control before the project begins, how will the work of the project get accomplished on time and on budget?

# More critical-thinking questions to ponder

- How can we find out if similar projects taken on in the past are frequently late and/or if their full scope wasn't delivered?
- To the above question, why did it happen and how can we use that knowledge before making similar mistakes?
- Is it possible that strategically aligned projects fully implemented "successfully" still might not make a difference in realized value to the organization, and why would that be the case?
- Do all projects have a logical cause-effect relationship to the company's mission, goals, and strategy
- What happens mid-project when those projects are competing for scant resources while not materially contributing to the company's mission?
- Would anyone be the wiser if the above were the case?
- Does the company prioritize and track its initiatives and time them to begin according to priority and resource availability?

# Taking AIM adopts a PPM approach to strategic alignment

## What's Project Portfolio Management (PPM)?

PPM is a strategically important business function that:

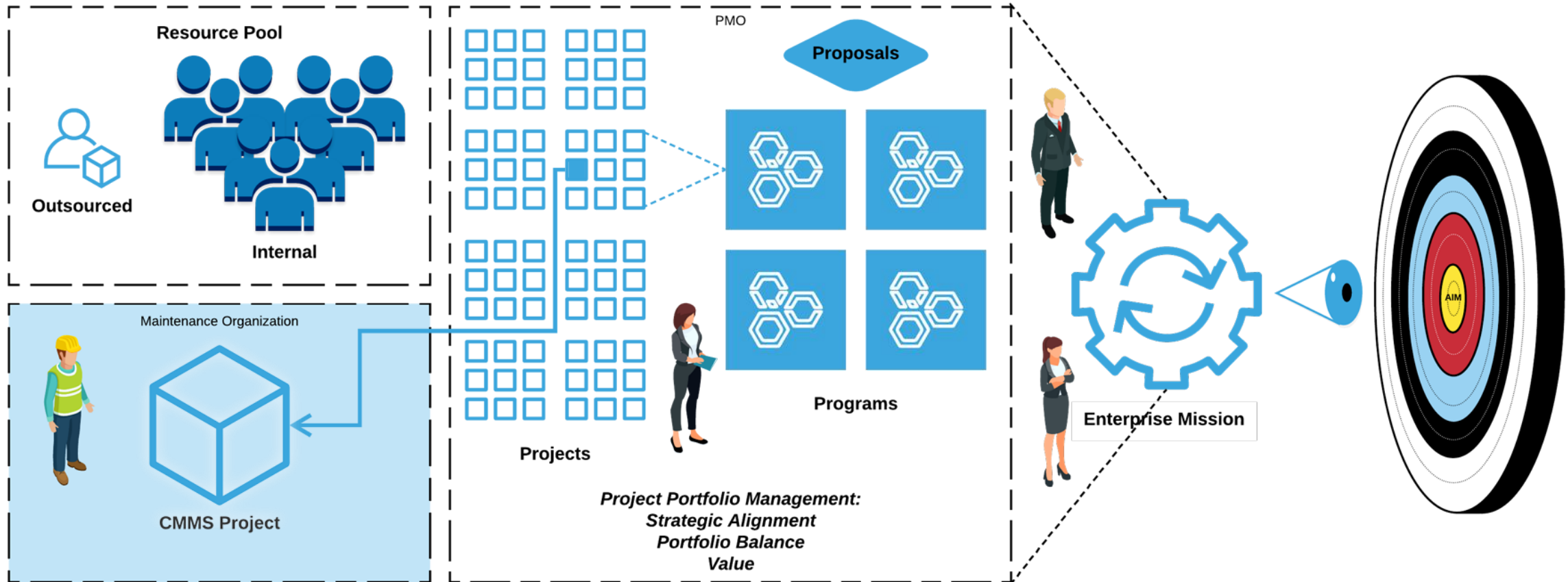
- Optimizes investment decision-making for all classifications of organizational changes effected through projects
- Enforces strategic alignment for projects by applying best practices within internal and external constraints
- Establishes requirements for project proposal submissions and business case guidelines
- Standardizes project initiation with a methodological approach and workflows ensuring planning quality
- Establishes *executive committee*\* standards, procedures and criteria for the selection and approval of proposals
- Provides a centralized overview and load balancing of organizational resources and staffing for all projects
- Tracks dependencies and potential conflicts among various simultaneous projects
- Standardizes project requirements, provides checks and balances, and conducts multiple project tracking
- Performs overarching project portfolio support and governance and strategic capacity planning



**Project Portfolio Management best practices are in line with AIM best practices.**

\*Joseph Juran calls this "Executive Council".

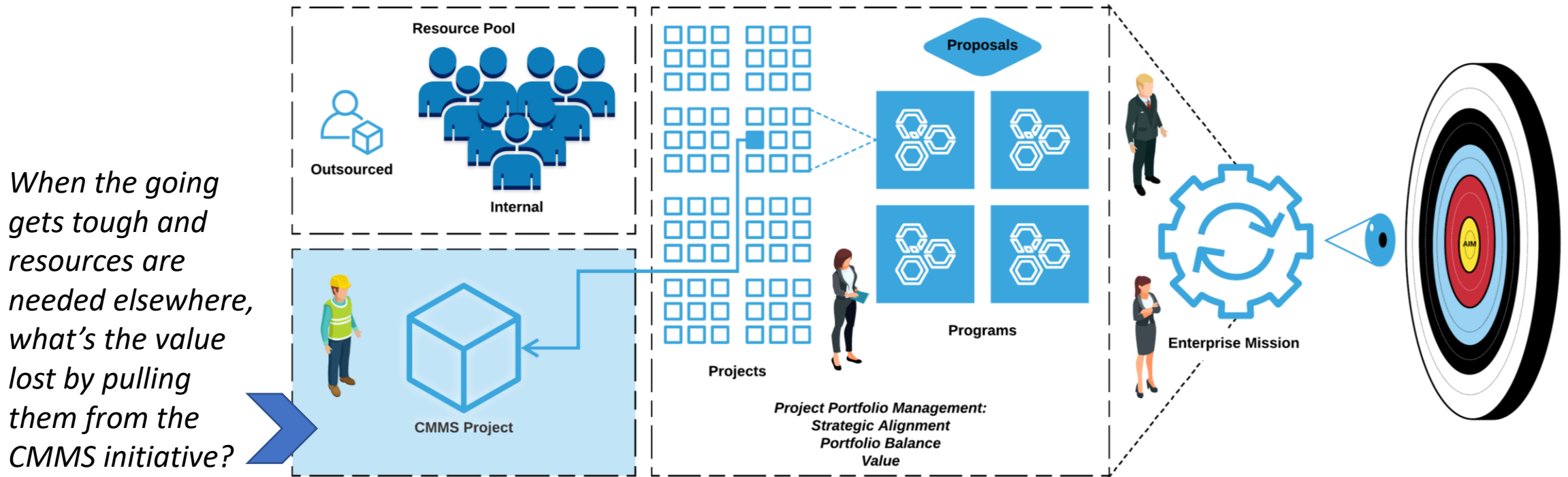
# Strategic alignment viewpoints



# So what? Resource load-balancing may be absent without AIM

- What might happen to the CMMS project if the resource requirements are not well supported by the project charter?
- Why would the CMMS project resource requirements not be met although an executive manager gave the go-ahead?

## The Project Value Landscape



# Project portfolio decisions – a brief peek behind the curtain

Before providing insight into some of the pitfalls and how to deal with them, let's take a brief look at a sampling of common PPM selection scoring criteria for project proposals implemented by an executive management committee.

- Strategic alignment
- Market attractiveness
- Fit to existing supply chain
- Time to break even
- NPV/ROI/IRR (financial results of CBA<sup>2</sup>)
- Product and competitive advantage
- Leverage of core competencies
- Technical feasibility/complexity\* (capability)
- Risks

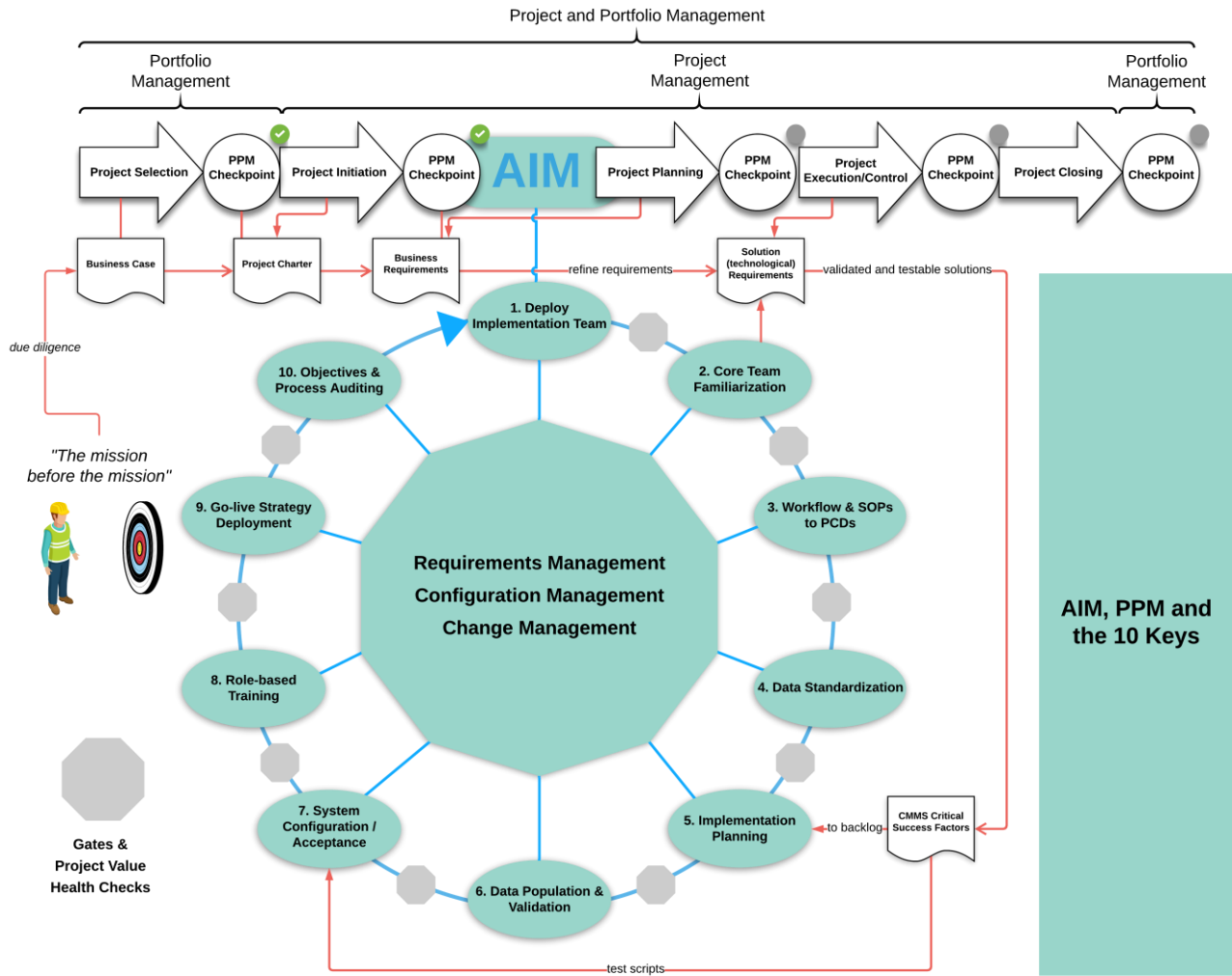
| Variable              | [Low Score]  | [Avg Score]  | [High Score]                                   |
|-----------------------|--|--|--|
| Technical feasibility | Very difficult: significant external expertise is required | Somewhat difficult: will require some external expertise | Easy: can be implemented by internal employees |

*\*Technical feasibility was chosen as an example here, as it is one of the most poorly estimated criteria often influential in CMMS deployment failure.*

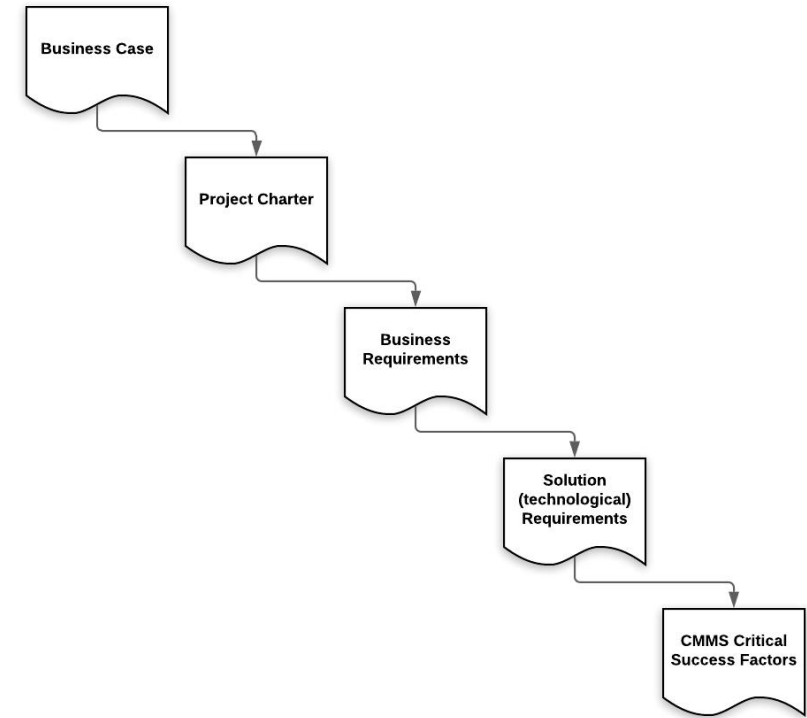
Note that there are some scoring criteria listed that seem to have nothing to do with a CMMS implementation. This is important to be aware of since CMMS deployments commonly experience resource deficits and other pitfalls. So making a strong proposal upfront must endeavor to align to key decision-making criteria as *mission-critical initiatives*.



# Strategic Project Portfolio Management and the 10 keys



Below: progression of drivers to commitment > commitment to requirements > requirements to solutions > and solutions to action...



PPM concepts shown were adapted from the book: Moustafaev, J. Project Portfolio Management in Theory and Practice: Thirty Case Studies from Around the World. Boca Raton, FL: CRC Press Taylor and Francis Group, LLC, 2017



## **CMMS Project Pitfalls**

# CMMS implementation: a poignant statement on failure

“If the CMMS is going to fail, then it better fail fast! Incipient failure costs will rise exponentially the longer it takes for the owner to come to grips with its imminence. Otherwise failure has *already* occurred, in which case cognitive dissonance has anesthetized and blinded the beholder.”

# **CMMS implementation pitfalls and challenges to overcome: Level 1**

**Organization not committed to, or lacks the culture to change**

**Insufficient portfolio management capability and PMO practices**

**Padding the budget by 20% strictly to avoid doing sufficient due diligence**

**Incomplete elicitation or discovery of drivers and key strategic benefits**

**Incomplete stakeholder requirements definitions and stakeholder analyses**

**Missing, lackluster or flawed cost benefits analysis**

**Faulty research, assumptions, estimation and analysis of opportunities, risks and solution options**

**Proposal objectives not clearly defined, SMART, or misaligned with a strategic business goals**

**Failure to identify key team and support stakeholders, project resource requirements, and availability needs**

**Weak value propositions, Business Case and overall insufficient due diligence upfront**

**Weak value propositions, Business Case and overall insufficient due diligence upfront**

## **CMMS implementation pitfalls and challenges to overcome: Level 2**

**Lack of top management understanding, support, and active commitment to the project mission**

**Insufficient budget to carry the project through successfully due to over-optimism**

**Insufficient resources due to underestimating resource requirements**

**Insufficient IT and Business Support for project work**

**Not getting SMEs and expected system users involved early**

**Weak implementation team**

**Lack of, or immature Change Management process**

## **CMMS implementation pitfalls and challenges to overcome: Level 3**

**Poor Internal project planning or capability**

**No project performance measures**

**Too much customization or disregard/lack of constraints or configuration management**

**No business process standardization, optimization or alignment (or Level 1 Ad-hoc) maturity**

**Multiple location issues and change management not addressed**

# CMMS implementation pitfalls and challenges to overcome: Level 4

Poor CMMS selection process

Poor implementation partner selection

No implementation process or project life cycle methodology

Cost-cutting during implementation

Many of these pitfalls are evident early on by assessing the presence and quality of key CMMS project initiation work products *before* the project is chartered. If the project is deficient in its initial due diligence, ultimately the situation may lead to snares that will prove difficult or impossible to recover from...

# What effects can poor AIM have on a CMMS initiative?

- False start
- Worsening business service performance and reduction in capability rather than increase in capability
- Trying miserably to solve systematic problems with technology
- Unpreparedness to support user training leading to unsatisfactory adoption
- Low quality, unusable data and data accuracy issues fostering poor decision making
- Project delay, postponement, derailment, cancellation, burn or “fizzle” out
- Little or no additional business value or undesirable disruption realized by the adopting organization unit(s)
- Significant financial losses and competitive disadvantage over time (with commissioned system) due to confusion, loss of knowledge, resource waste, downtime, etc.
- A dominating sense of organizational frustration and attrition
- Initiative completes significantly over budget and/or provides a poor rate of return beyond mission projections
- Lack of enthusiasm and morale among user community to support the CMMS’ potential



# 50 frequent culprits of CMMS implementation initiative failure

1. The project lacked executive management support
2. The project wasn't anchored strongly to high value program *and* aligned to the company's strategic mission
3. The project was established based upon initial price rather than the long-term value that could be achieved
4. Failure to prepare a robust business case or proposal
5. Having no formal project documentation to track from
6. Not involving a Business Analyst at critical preparation and planning stages
7. Lack of alternatives due to low efforts applied to the development of the Business Case or proposal (best case, likely case, worst case, do nothing case)
8. No clear definition of success or failure for the project outcome, not quantified, and didn't pass the "SMART" test
9. Lack of agreement on project objectives
10. Not understanding which requirements are critical to success vs. ones that are important or less important

# **50 Frequent culprits of CMMS implementation initiative failure**

11. Not having a sufficient project life-cycle process and roadmap
12. Not understanding the process of refining requirements and managing them
13. Not having an institutionalized configuration management process
14. Failure of governance and oversight or lack thereof; inadequate governance, failure to regulate with a “checks and balances” process
15. No periodic project health-check monitoring and corrective controls by a party external to the project
16. The project had an inexperienced or overly confident sponsor or Project Manager
17. No coinciding organizational change management strategy
18. Frequently changing project team personnel
19. Frequently changing stakeholder base
20. Bit off more than the team could chew or the team's availability to commit to

# 50 frequent culprits of CMMS implementation initiative failure

21. Not preparing formal business requirements and sharing them with the vendor
22. Weak collaboration on a project plan and schedule with vendor
23. Conflict in project approach or no mapping between client and vendor project life cycle stages
24. Poor stakeholder engagement and weak communication plan
25. Wishful thinking believing the budgets could be controlled with overly optimistic deadlines
26. Requirements lacked detail, clarity, due diligence, analysis, prioritization, validation (alignment to project goal), and testable verification criteria
27. Allowed low-value and unfocused scope and feature creep during planning and execution
28. Trying to pack related initiatives into one project when they should've been separate workstreams and projects
29. Significant scope creep that should've been included in a separate phase or separate concurrent or related project with a distinct new Business Case or proposal to be evaluated
30. Weak due diligence of SWOT -- risks, drivers, stakeholders, use of lessons learned from past projects, and not having a mitigation plan for likely and impactful risks

# 50 frequent culprits of CMMS implementation initiative failure

31. Poor risk management or faulty risk management strategy applied
32. Inadequate budget or funding was pulled -- not looking at all alternatives, tradeoffs and consequences
33. Weak PM preparation for potential team conflicts, stakeholder conflicts, and having a mitigation plan for behavioral weaknesses
34. Experienced critical resource skills deficiencies due to inadequate upfront due diligence
35. Experienced critical resource availability deficits due to other company priorities competing for the same *resource pool*
36. Political reasons, unchecked fear, and project sabotage
37. Bad go-live timing; unrealistic timing set by executives
38. Inexperienced or incompetent consultants
39. Multiple enterprise-wide software projects running at the same time
40. The project kicked off prematurely or moved forward without initial quality checkpoints in the preliminary and initiation stages

# 50 frequent culprits of CMMS implementation initiative failure

41. Not having a disaster recovery plan
42. Not understanding the impact of business process changes
43. Poor metrics for the project and for the work unit(s) capability being implemented
44. Failing to consider the management of legacy capability replacement
45. Organization lacked the capability of balancing resource load
46. Thinking a pilot would require less due diligence thus rushing into it while having a low-risk expectation that led to short-cutting and weak user and stakeholder respect for the pilot initiative that subsequently pilots the same sentiment at other locations
47. Being so involved with the daily activities of the project, or being so emotionally invested in it to detect or admit when the project is in jeopardy
48. Not knowing when to say "uncle"
49. Allowing significant problems to fester once detected, and expecting them to iron themselves out eventually (they get worse)
50. The PM not recruiting help at critical junctures of "stuck" due to fear of harsh judgement of incompetence

# Five key omens that the CMMS project is experiencing trouble





## **Strategic Alignment & Value**

## POLL QUESTION No. 2



What is a valid implementation *timeframe* between the Project Charter sponsorship and Go Live date? **(Click only one answer)**

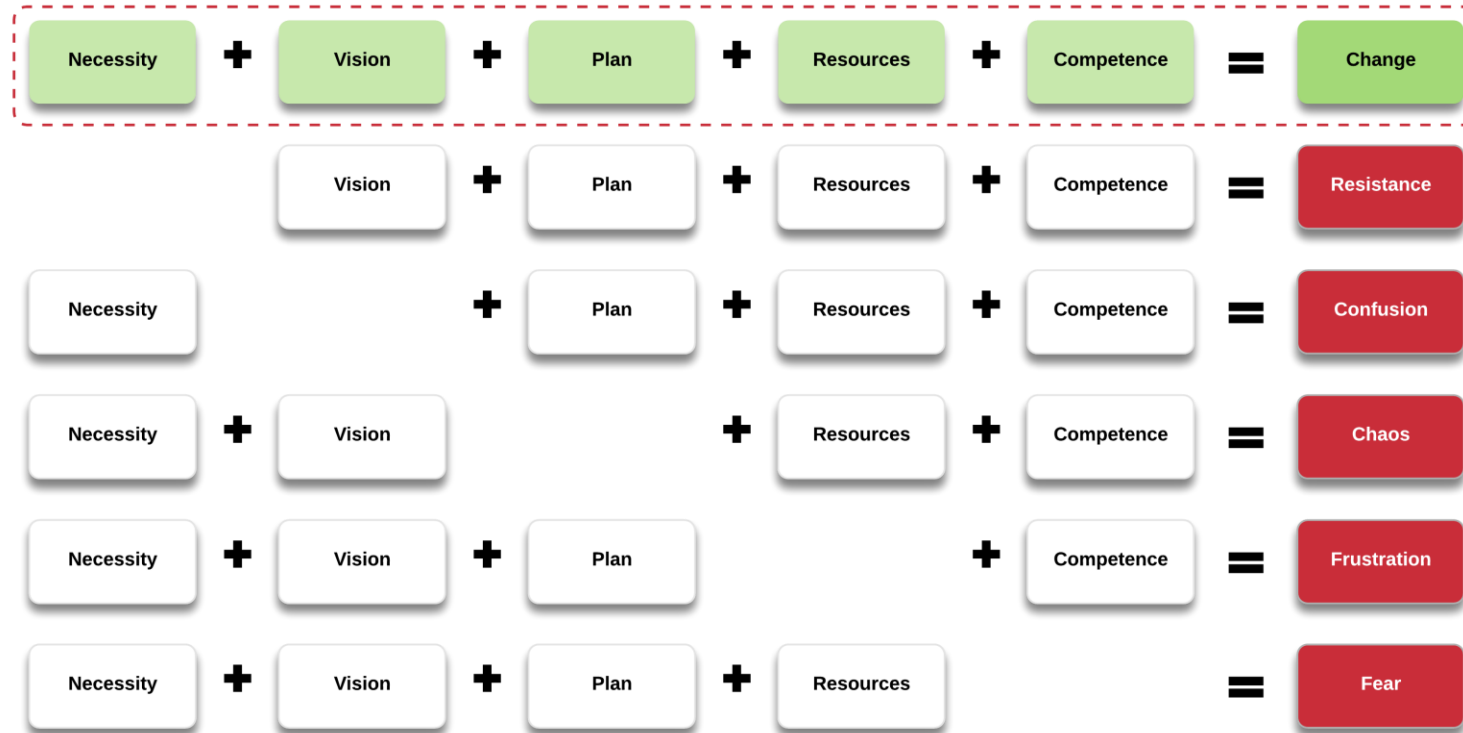
- 1 – 3 months
- 3 – 6 months
- 6 – 12 months
- More than 12 months



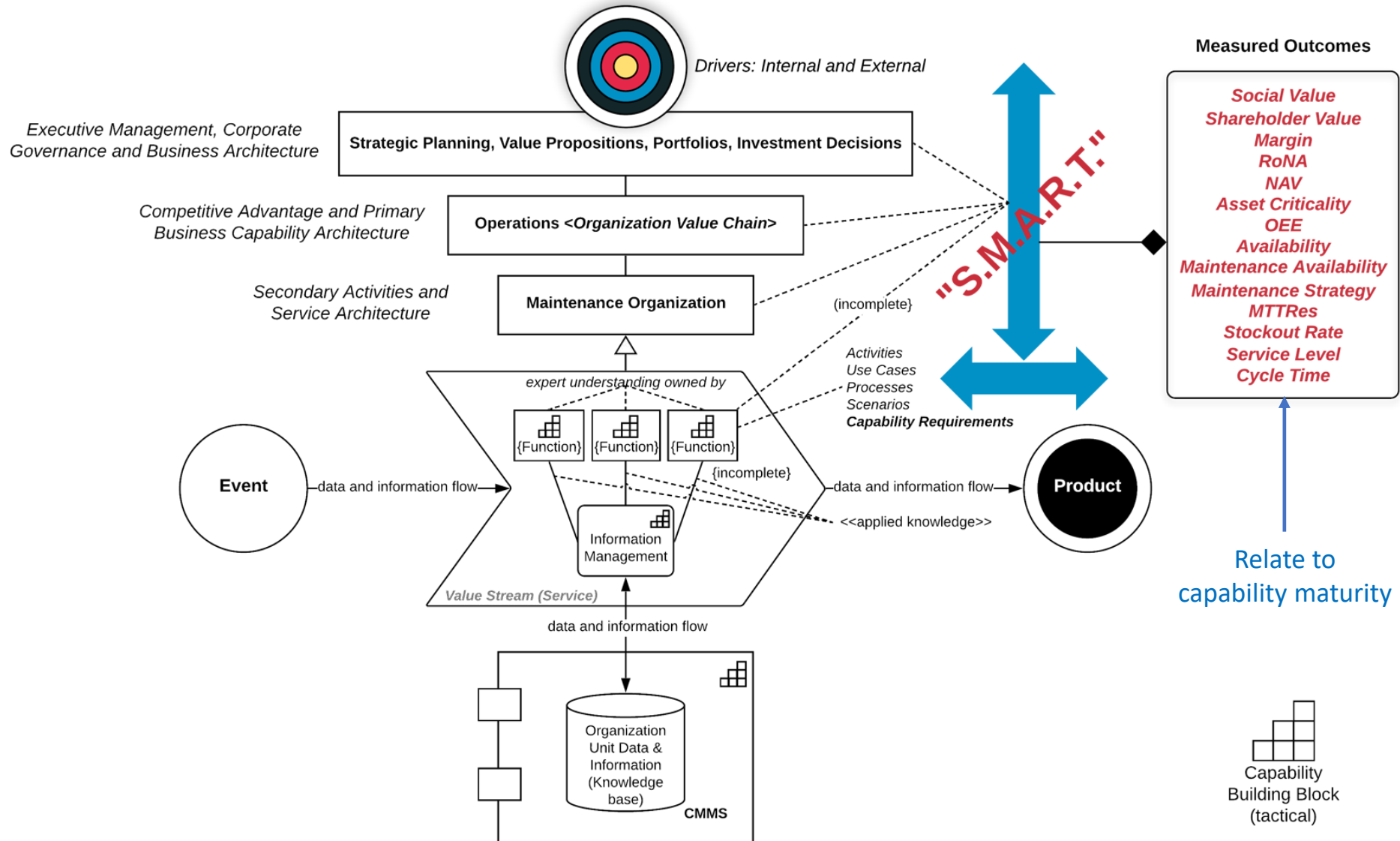
# Building blocks of change NVPRC

BEFORE YOU START...

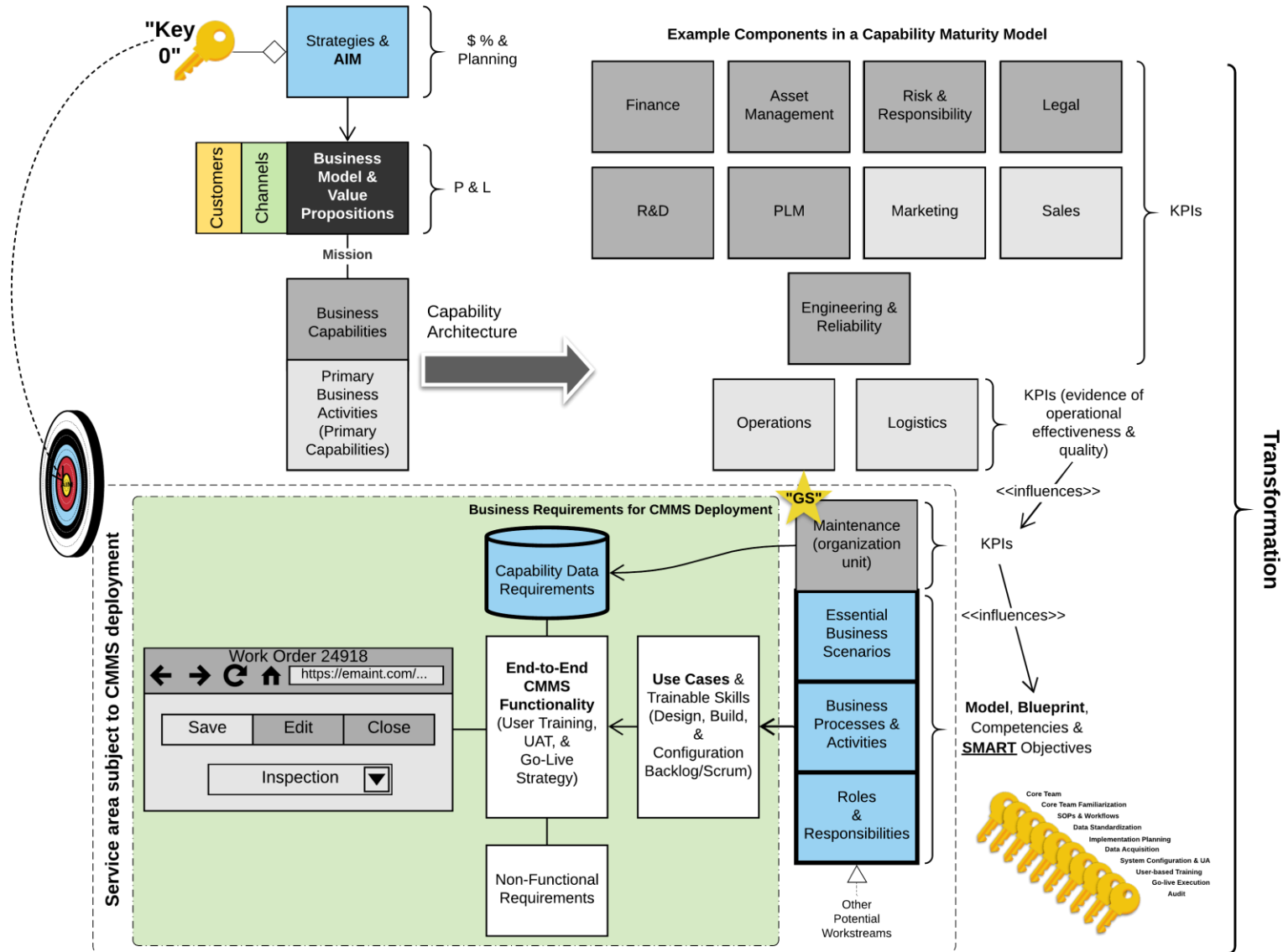
## CULTURE AND INCREMENTAL CHANGE



# SMART alignment

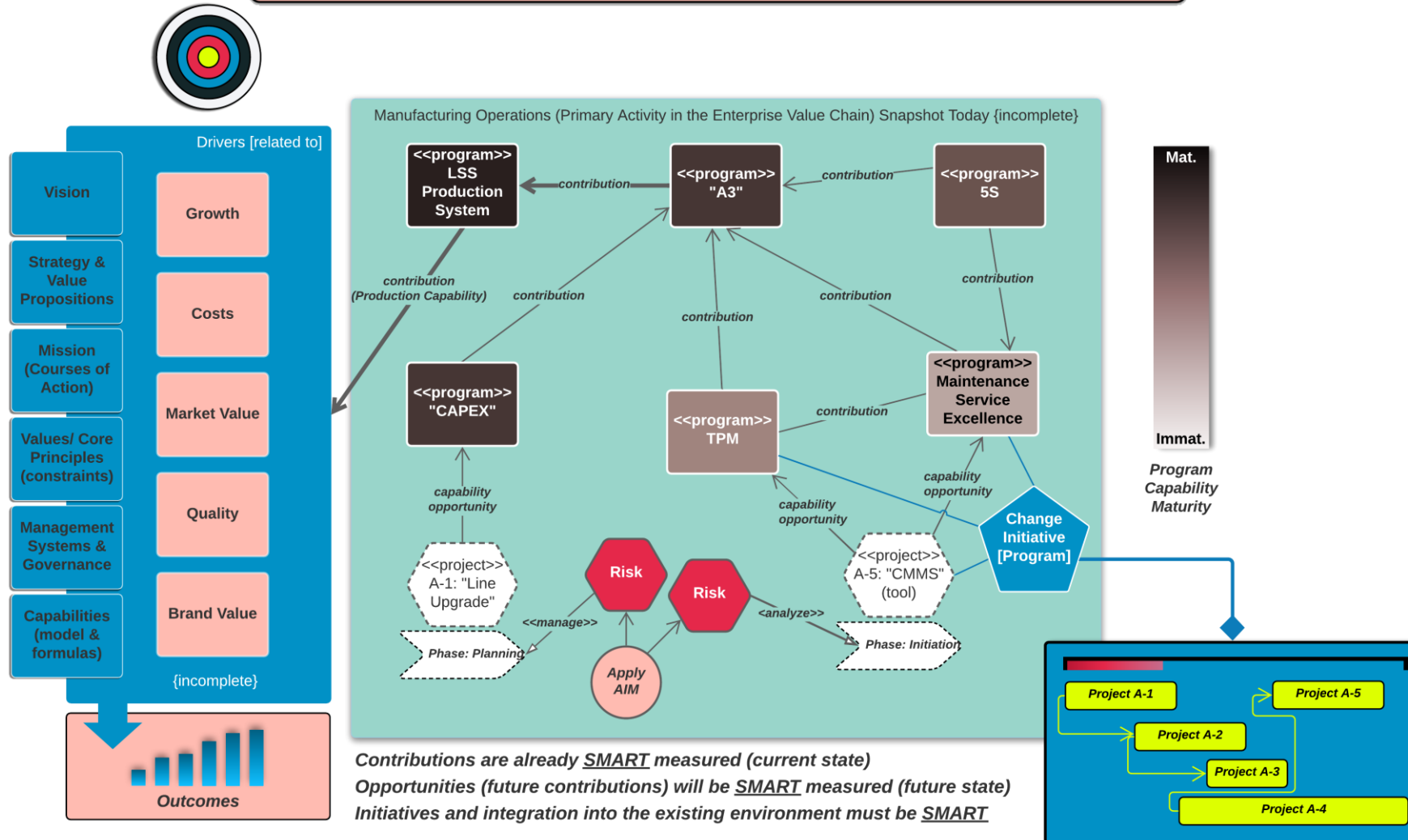


# Business architecture transformation with CMMS implementation



# CMMS implementation in the context of a change initiative

Core Constraint of Change: We Must Achieve Greater Total Enterprise Integration and Alignment





## **The Business Case**

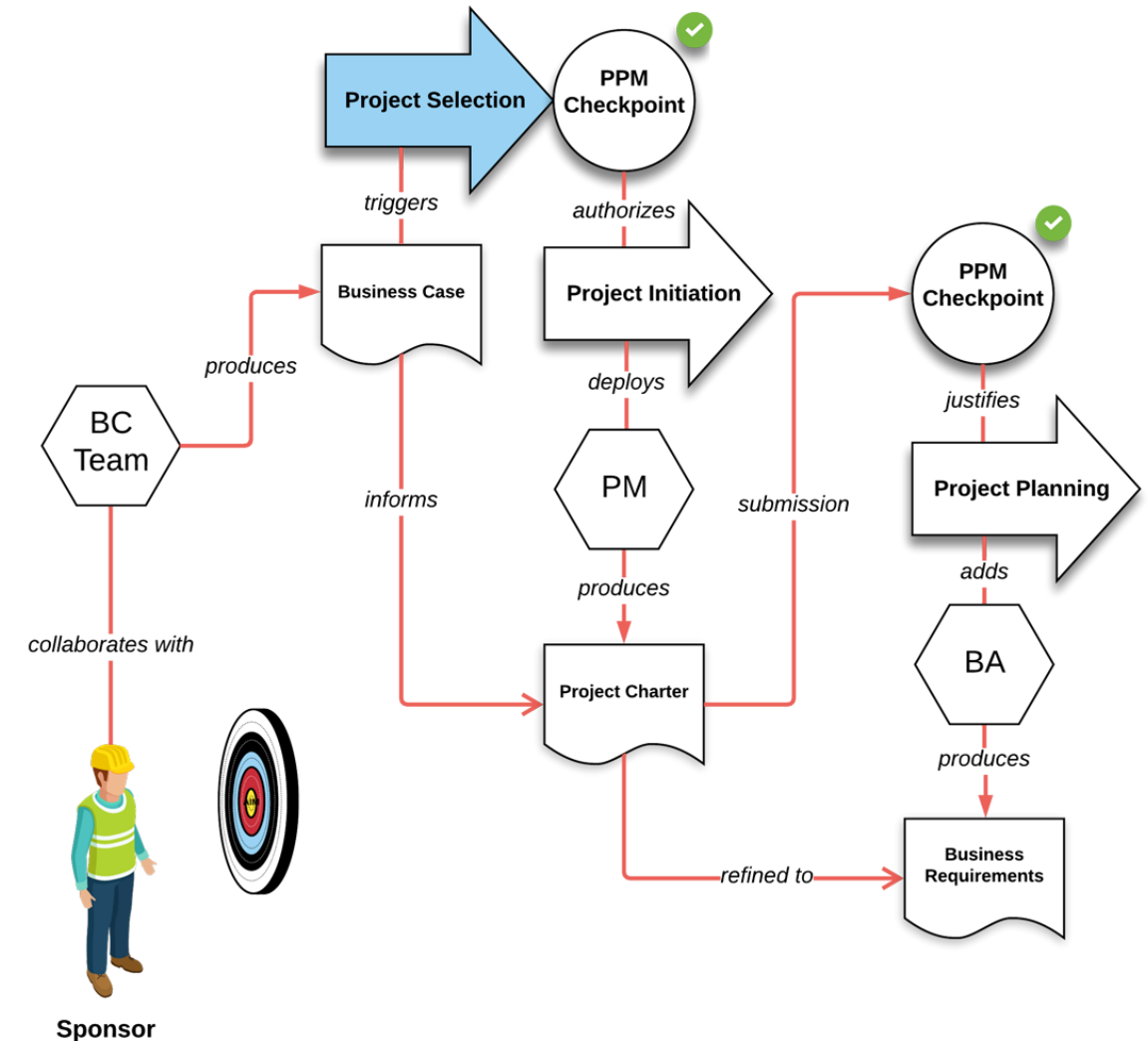
# A business case project proposal's purpose to the recipient

- It clearly states the nature and urgency of the problem and identifies mission critical gaps
- It identifies the area and scope of the problem's impacts
- It uses smart goals
- It identifies relevant KPIs
- It identifies technical feasibility and required resources for the implementation
- It captures and summarizes the reasoning and rationale for initiating a project to implement capabilities
- It builds on the premise of a service's mission to deliver customer value through a work product (service)
- It expands on the organizational unit's value proposition to identify the total organizational impact
- It qualifies the accuracy of methods, data collection and estimates used to arrive at a compelling recommendation
- It identifies both tangible and intangible business benefits and quantifies them
- It provides multiple scenarios, options and their expected impacts including to impact of doing nothing
- It provides worst, best, and most probable case for budgetary items, ROI, and rate of return
- It fairly evaluates the value-add results that stakeholders should expect *with* a high degree of accuracy
- It identifies logical cause-effect requirements and clear reasoning to justify the commitment of resources and funding
- It recommends a course of action that management should take based on evaluation conclusions and supporting data

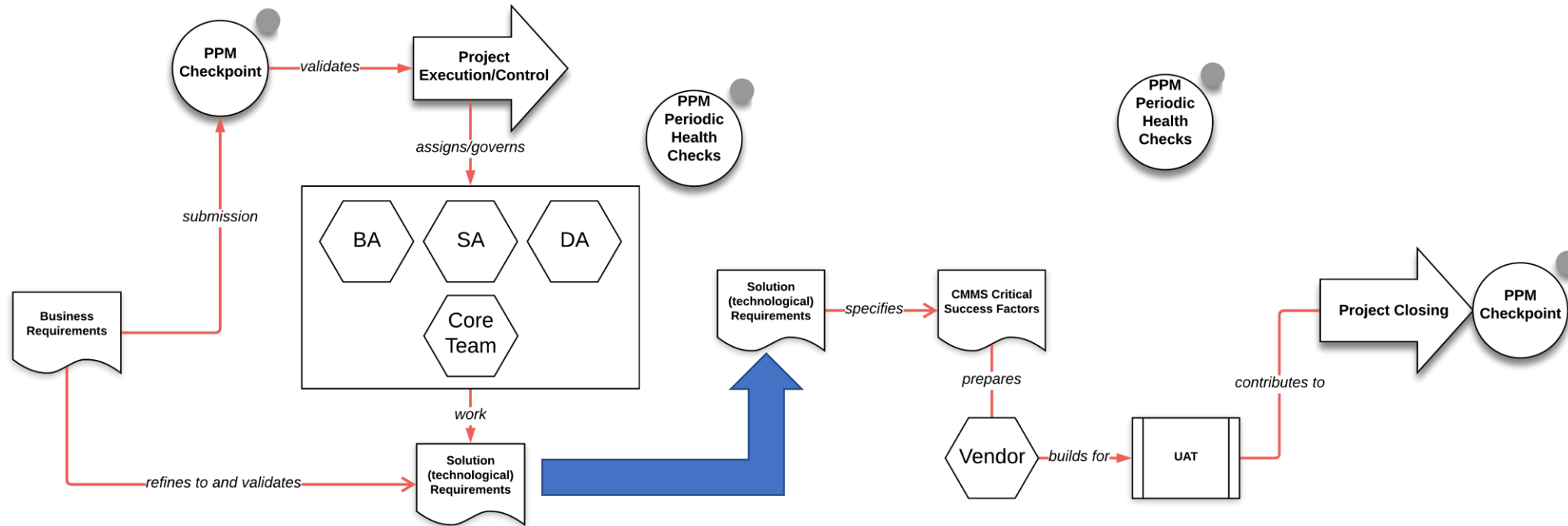
*Note: a Business Case is not a business plan!*

# Example applying AIM principles and starting the right way

- The Corporate Director of Maintenance is ready to deploy an enterprise-wide CMMS
- He forms a Business Case Development (BCD) team to get the ball rolling
- They conduct the appropriate due diligence and work to prepare a solid business case including a cost-benefit analysis with all the portfolio selection criteria hitting the mark with best case, likely case, worst case, and do-nothing scenarios
- The Business Analyst on the team submits the Business Case for Executive Committee approval
- Having been approved, the project initiates and a Project Manager is assigned to begin working starting with thorough research and review of the high-level scope and work area subject to implementation
- With the help of key SMEs, the PM works diligently on the Project Charter adding updates and some additional required scope items to the Business Case as well as augmenting with additional resource requirements (related to 10 Key #1)
- The PM submits the Project Charter, and strategic alignment, updates and ROI still looks great thanks to the excellent upfront work of the BCD team
- The core project team enters the planning phase and begins to work with a Business Analyst which was requested in the Project Charter to develop the full scope of business requirements



# Example carried to CMMS implementation phase 1 completion



1. Once the CMMS project is kicked off, the detailed solution building work begins with the core team and analysts. There should be periodic health checks ensuring that the project is still on track (AIM) focused on the implementation of the required strategic capabilities and that the calculated value, ROI and detailed success criteria fall within project constraints.

2. When the solution is locked and loaded, the CMMS implementation process begins with an agreement of critical success factors (mission critical requirements) that includes what data, triggers, workflows, and reporting is needed to add value in delivery of the business service. Then the solutions are built, end-to-end tested and remain valid against the documented AIM all the way through.



# Business case essentials

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- Know the audience and understand their business motivation
- Input: company's strategic mission
- Identification of affected value propositions of relevant business services
- Input: research of the overall nature and impact of the problem to be solved
- Input: lessons learned from other similar projects
- An ample team including Business Analyst and SMEs for preparation of the business case
- The portfolio decision scoring matrix and/or decision criteria for making fair proposal valuations
- Characterization of the baseline (current) state (important for Executive Summary)
- Characterization of the proposed target (future) state and required capability needed to solve the problem
- *Complete* target state assumption definitions
- Definition of the proposed implementation process
- Definition of key data to be collected
- A succinct and credible business case communicator with excellent persuasion abilities for the executive review

# Business case sample final report table of contents

## Sample Table of Contents for a Business Case Final Report

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- i. Title page
  - ii. Table of contents
    1. Overview
    2. Stakeholders
    3. Executive overview
      - 3.1 Description of the project/initiative
      - 3.2 Explanation of why the project/initiative is necessary
      - 3.3 Costs–benefits analysis summary
      - 3.4 Risks/disadvantages analysis summary
      - 3.5 Other options considered summary
      - 3.6 Recommended actions
      - 3.7 Executive summary
    4. Body of the Report
      - 4.1 Scope statement
      - 4.2 BCD team charter
      - 4.3 Project initiative goals and objectives
      - 4.4 Problem statement and/or vision statement
      - 4.5 Assumptions and constraints
      - 4.6 Proposed environment
      - 4.7 Requirements
      - 4.8 Project milestones/schedule
      - 4.9 Benefits
      - 4.10 Impact on solution selection
      - 4.11 Impact analysis
      - 4.12 Funding
      - 4.13 Alternatives analysis
      - 4.14 Risk analysis
      - 4.15 Project team preliminary charter
      - 4.16 Summary
    5. Attachments
      - 5.1 Attachment A: Definitions
      - 5.2 Attachment B: Process map—desired future state (proposed)
      - 5.3 Attachment C: Requirements matrix
      - 5.4 Attachment D: Desired future state (proposed)
      - 5.5 Attachment E: Decision criteria and methodology
      - 5.6 Attachment F: Change management considerations
- 

Sample Table of Contents for Business Case Final Report from: Voehl, C, Harrington J. Voehl, F. *Making the Case for Change: Using Effective Business Cases to Minimize Project and Innovation Failures*. Boca Raton, FL: CRC Press Taylor and Francis Group , LLC, 2017

# Tips

- Always involve an experienced Business Analyst by profession early for anything other than low-risk low-ROI Implementations and lean heavily on their critiques of the initiative – other than that, apply good BA practices for any initiative
- Aim to always configure the proposed solution to specify in-house resources, if possible, for the cost savings. But sometimes you'll have to hire out if special skills are needed or there's an internal resource limitation expected for the schedule. Err on the side of caution when in a mismanaged project portfolio organization
- Padding the budget might be fine, but absolutely do not under any circumstances do that in place of conducting a thorough cost-benefit analysis, due diligence, and bringing in expertise to develop a rock-solid business case in the preliminary stage
- There should be no logical or cause-effect disconnect in the business case in terms of the solution. There should be robust checks and balances that prevent nebulous “pie-in-the-sky” projections and proposals from making the cut. Use SMART!

# Tips

- Use multiple abstraction levels for communications and modeling such as executive summary vs. detailed break down analysis for different audiences. Be sure to have the multiple abstraction levels on tap
- Leverage enterprise architecture ontologies to maintain strong focus on building a case for strategic alignment
- Seek to leverage good detailed case studies for capturing ROI from your industry such as Total Quality and Lean Sigma Sigma
- Rigorously procure understanding of past and recent implementation challenges, recent trends and lessons learned from other similar projects around your organization. Study diligently keying in particularly on the high-profile failures

# QUESTIONS?



Thank you!

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# Next webinar Nov. 4: How 'connected' thermography builds sustainable asset health management

BEST PRACTICE WEBINAR | Wednesday, Nov. 4, 11 a.m. ET

## How 'connected' thermography builds sustainable asset health management

Asset health management programs fail more often than they succeed. In this webinar, we share the top five reasons such programs fail and how a cloud-based, connected thermography program can help overcome these challenges.

**Michael A. Watson**, Product Application Specialist with Fluke Reliability, outlines the people, processes, and technology to build a sustainable program. A qualitative asset health management program with connected data builds on the capabilities of a maintenance team and delivers a sustainable program.



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