

The background is a collage of industrial images: blue electric motors, a large metal turbine, and a worker in a hard hat and safety vest holding a tablet. The collage is overlaid with a white geometric grid of triangles.

**FLUKE®**

Reliability

# The Journey of Transitioning to a New CMMS

Taking the First Steps

July 2025

# Meet the Speakers



## Tara Acree

*Enterprise Account Executive, Key Accounts*

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- 12 Years in the Maintenance & Reliability Industry
- Specialized in Life Sciences, Healthcare, and Automotive industries
- Fun Fact: New Mom (Advice is Welcomed!)

## POLL QUESTION No. 1



**Where are you in your current CMMS Journey?**  
(Click only one answer)

- I have a CMMS, however I'm looking for a new solution
- We don't have any CMMS in place
- We have tried to implement a CMMS and failed
- I'm just researching

# Agenda

- Data Basics
  - Options for Gathering Data
    - Migrating Data from Legacy Systems
    - Starting Fresh
  - What Data Should I be gathering?
  - The Basics of Good Data Practices
- Setting Goals for a CMMS
  - Short & Long Term Goals
  - Alignment on Goals
- Planning for Success
  - Timeline & Training
- Choosing the Right Vendor Partner



## Disclaimer

- This presentation covers several Best Practices Approaches to implementing a CMMS program. Each CMMS implementation is different and will vary based on size and complexity. The topics today can be scaled up or down according to your needs
- Let's start the Journey!



# Data: The Foundation

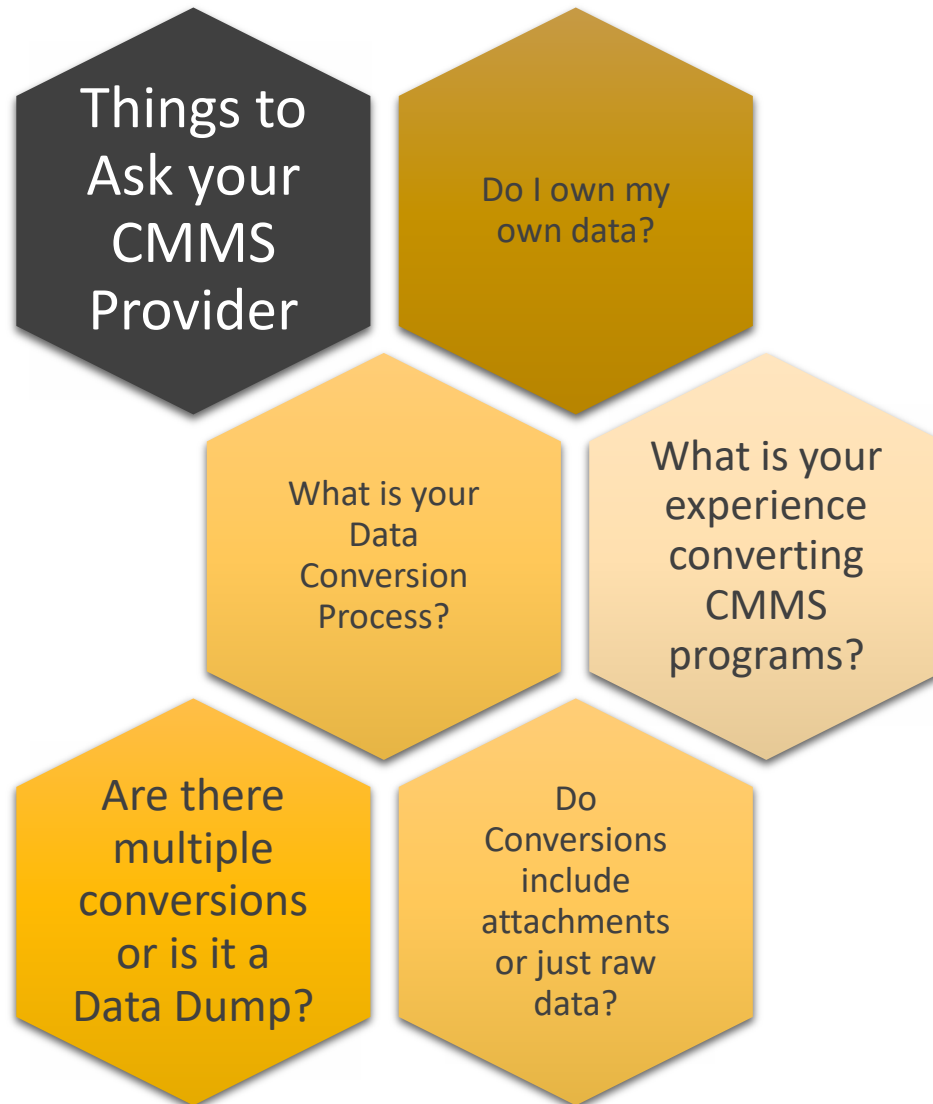
## POLL QUESTION No. 2



**Where is your Data today?**  
(Click only one answer)

- In a CMMS
- In Excel
- All in my Head
- What data? I'm supposed to have data?

## Data Migration: Option 1: Data Conversion



### Benefits of a Data Migration:

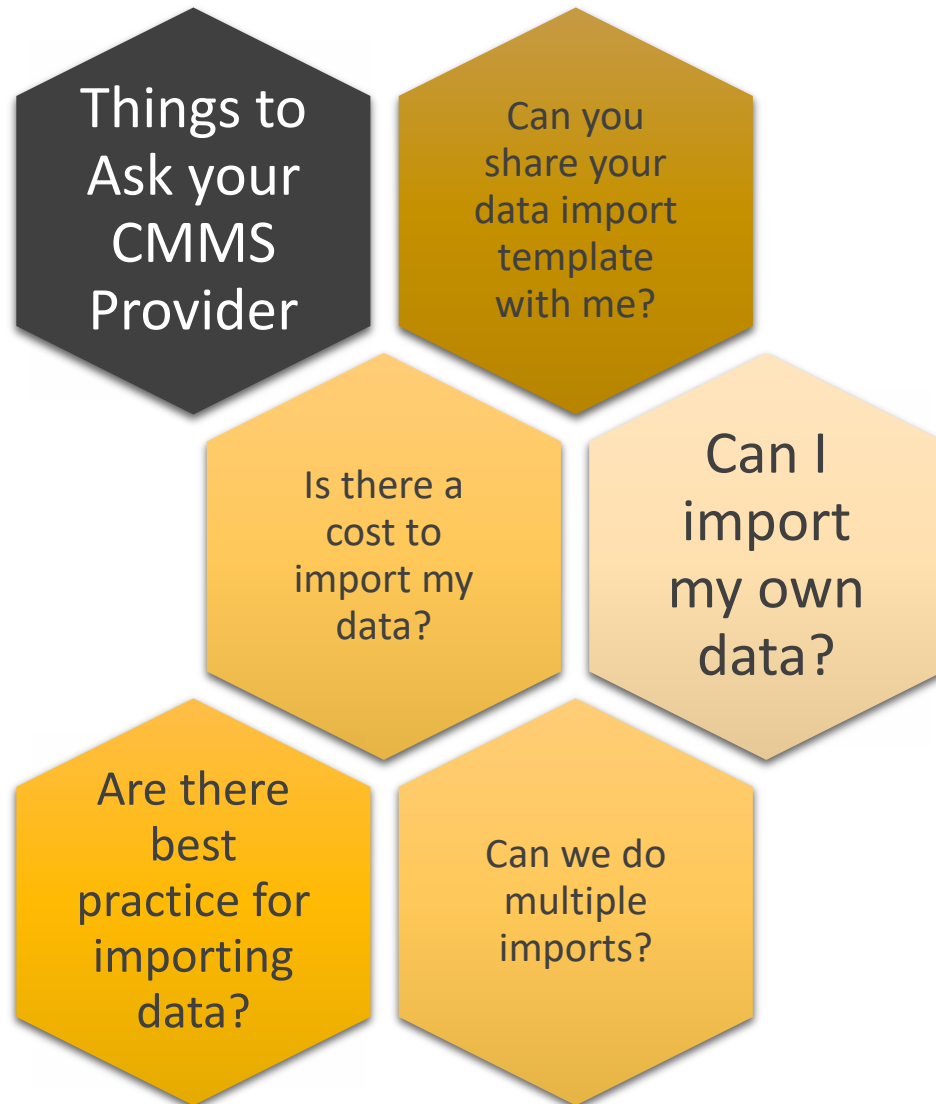
- ☐ Maintains Historical Accuracy
- ☐ Frees Up Resources from Manual Data gathering

### Planning:

- ☐ Quality of Data:
  - ☐ Scrub your Data before you send over the backup file
  - ☐ What Data do you want to migrate?
  - ☐ Just raw data or pictures/documents as well?
- ☐ Request a budgetary quote for the conversion



## Data Migration: Option 2: Start Fresh



### Benefits of a Data Import:

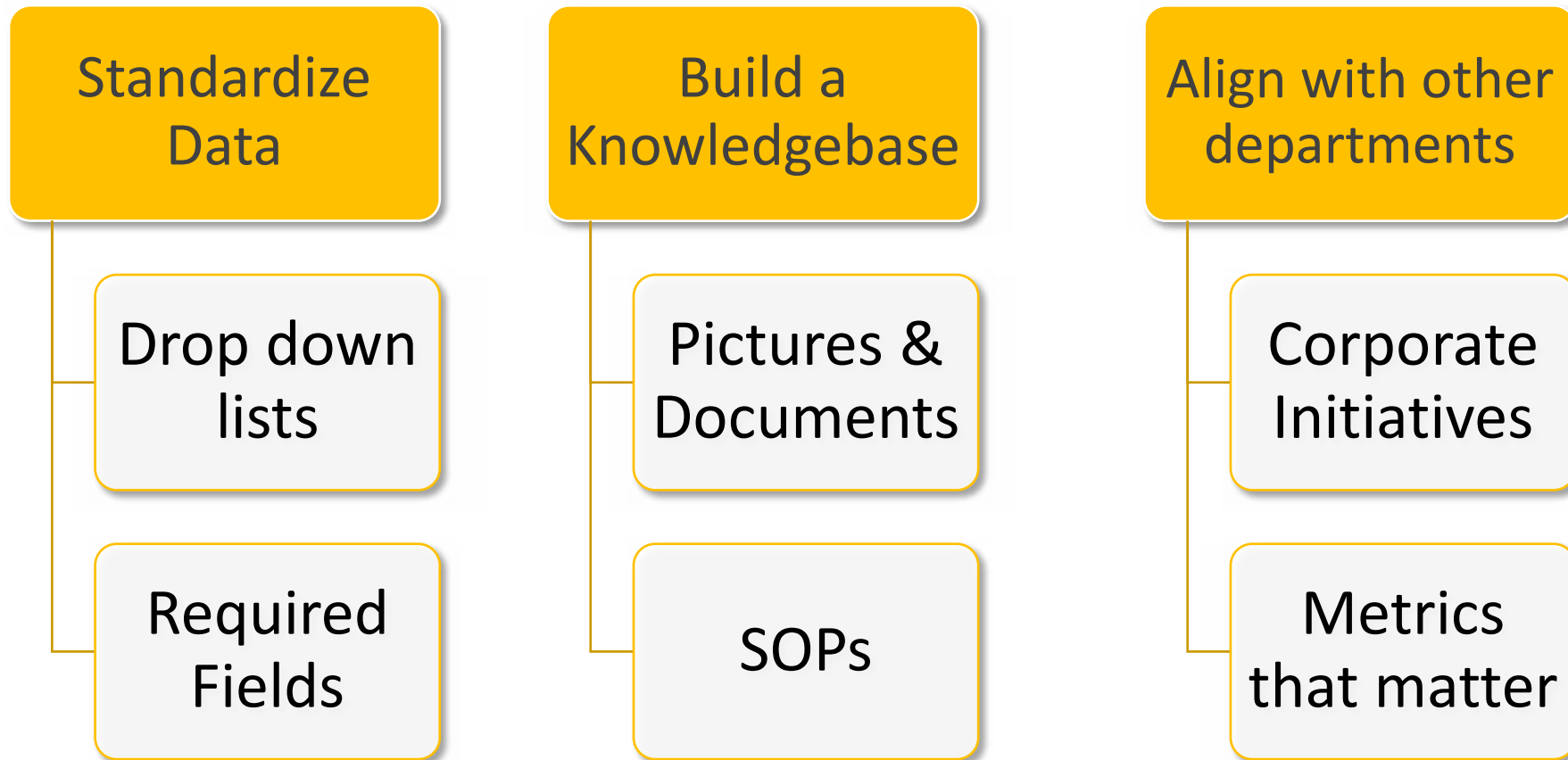
- ☐ Typically a no cost service
- ☐ Starts Fresh with good data

### Planning:

- ☐ Plan Resources to get your data into the data import template
  - ☐ Resources are not just people, but also planning time
- ☐ Collect Good Data! Now is the time to plan what data you want to gather in your new shiny CMMS system

## Good Data Principles

TIP: Think about the Metrics you want to pull- the data should support that (MTBF, Downtime, OEE, Repetitive Failures)



## Example Data: Assets

### Name Plate Information


- Asset ID, Asset Description, Manufacturer, Model, Serial Number, Parent Asset ID

### Repair vs Replace Information

- Purchase Date, Purchase Cost, Life Expectancy

### Compliance Information

- Criticality, GMP Regulated, Safety Asset, EPA regulated



**PUMP,G-20A COOLER RECIRCULATION 1ST FL**  
Asset Type: System  
Serial Number: BT 4056824 135

> Stats

Asset Identification & Classification		OEM Information	
Asset ID	NE SMTPUMP	Condition Monitoring Status	Monitor Off
Asset Type	System	Manufacturer	Summit
Asset Criticality	1	Model Number	BTSA 800
Asset Description	PUMP,G-20A COOLER RECIRCULATION 1ST FL	Serial Number	BT 4056824 135
Assigned Machine	MLT - Pump House	Warranty End Date	08-25-2022

## Example Data: Work Orders

### Scheduling/Planning


- Created Date, Scheduled Date, Due Date, Priority Level, Work Order Type

### Reporting Metrics

- Notes/Comments, Failure Codes, downtime, work order status, job status, Task, Brief Description

### Compliance Information

- Criticality, GMP Regulated, Safety Asset, EPA regulated




#### Quarterly Inspection

WO Status: Open

Work Order Number: 8104

Scheduled WO: [Quarterly Inspection](#)

 No address

Basic Info		Asset Information	
Work Order Number	8104	Asset	<a href="#">Extrusion Machine</a>
Job Status	<a href="#">Ready for Planning</a>	GxP Asset	True
WO Status	Open	Site (Plant Location)	Atlanta
Work Order Type	<a href="#">Preventive</a>	Building	Main
Scheduled Date	06-18-2025 20:03:55	Priority	1
Due Date	06-25-2025	Rime Ranking	1


## Example Data: PM Schedules & Inventory

### Preventive Maintenance

- Link to SOPs, Estimated Time to complete, Required Labor

### Inventory

- Part Number, Part Description, Supplier Part Number, Manufacturing Part Number, Lead Time, Alternate Part Numbers, Part Classification



Belt  
Number: 1722

> Stats

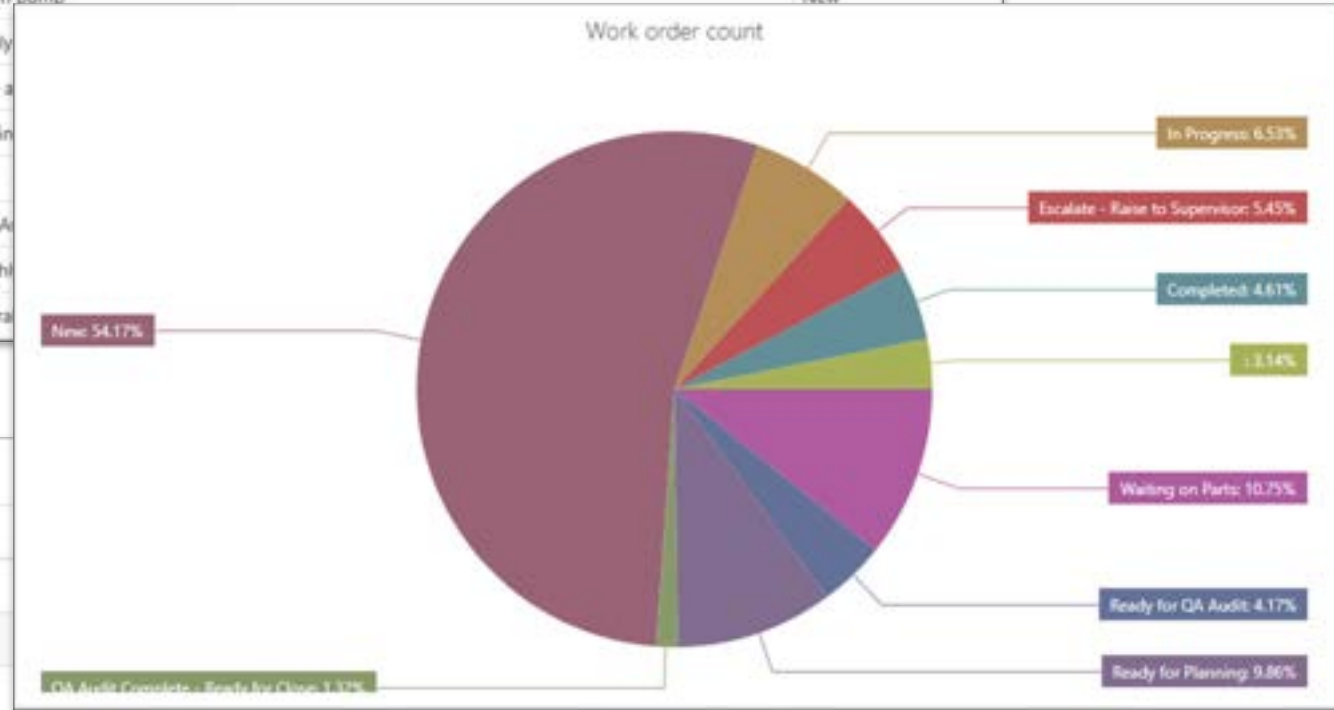
Manufacturer		Stock	
Part Number	PART123	Stock Item?	Yes
Description	Belt	Unit of Measure	EA
Manufacturer	Aramid	Critical Spare	False
Manufacturer Part Number	10/5VK3150	ABC Code	C
Part Creation Status	Approved	Lead Time (days)	5
GMP Part?	True	Bin	14
Account #	14792546	Shelf	3
Class	Spare	Alternate Parts	1702.8751

REMEMBER DROP DOWN LISTS WHENEVER POSSIBLE!



## Example: Metrics to Create with the Right Data

Number	Schedule Date	Asset Description	Brief Description	Status
.03K	6/4/2025	Quarterly Inspection	Quarterly Inspection	Waiting on Parts
.03K	6/2/2025	[Failed] Check all sensors/reed switches and belts for wear, cleanliness and function. Ensure all prot...	[Failed] Check all sensors/reed switches and belts for wear, cleanliness and function. Ensure all prot...	Waiting on Parts
.04K	6/4/2025	Broken pump	Broken pump	New
.04K	7/3/2025	Weekly Maintenance	Weekly	
.04K	6/5/2025	There are too many lights out in the cafe	There a	
.04K	6/5/2025	machine is making a funny noise	machin	
.04K	6/6/2025	Rime	Rime	
.04K	7/7/2025	Semi Annual system check	Semi A	
.04K	7/7/2025	Monthly Hydraulic Shear - Functional Check	Monthl	
.04K	7/7/2025	General multi-asset work order	Genera	



Asset ID	Asset Description	Original Purchase Date	End of Life				
12X-TEXT	Lindauer Weaver Unit	7/1/2021	6/27/2036				
21HOIST	Hoist Column Assembly	12/4/2019	11/30/2034				
HS_MN_001	Horizontal: 5 AXIS Hammer Mill	12/4/2019	11/30/2034				
MHC01	MHC01 - Liebherr Litronic	9/29/2020	9/26/2035	15	\$22,983.00	\$10000.00	\$4325.00
MHC02	Stage IV / Tier 4 final engine	9/29/2020	9/26/2035	15	\$22,983.00	\$10000.00	\$4325.00
MHC03	Four-rope grab control	9/29/2020	9/26/2035	15	\$22,983.00	\$10000.00	\$4325.00

## Multi-Site Data Planning- Good Data Practices



- ❑ Example Fields for drop downs: Asset Type, Work Order Types, Work Order Status, Priority Levels, Failure Codes
- ❑ Nomenclature & Taxonomy: ISO14224 standards, prefix for asset and part IDs
- ❑ Webinar on Best Practices for Multi-Site Standardization

### Ready to Consolidate? Hear the Fluke Reliability Tips to Multi-Site Standardization

June 13, 2025

BP Webinar: Ready to Consolidate? Hear the Fluke Reliability Tips to Multi-Site Standardization

Watch later Share

#### Pitfall Themes

<b>Bottom Line Impacts</b> (Financial & Operational Risk)	<b>Adoption &amp; Engagement</b> (People-Centered Pitfalls)
<b>System Design &amp; Data Pitfalls</b>	<b>System Misalignment</b>

"The most expensive CMMS implementation mistake isn't choosing the wrong system—it's assuming everyone will use it the same way."

Watch on YouTube

FLUKE Reliability

## How to Get my Data?

### Migration from a Current CMMS

- ❑ Contact either your IT team or your CMMS provider, ask for a backup file of the data base

### Starting from Scratch

- ❑ Companies that offer data collection
- ❑ Interns/Temps that can assist
- ❑ Allocated resources internally (collect a few a day)

The data is the foundation of your journey- it is critical to get started and deserves the proper time to plan. It is the ingredients that go into your meal- if you start with bad ingredients, you're going to end up with a pretty poor dinner

# Setting Goals: Plan & Design

## Measurable Goals



- ❑ Short Term Goals:
  - ❑ Prioritize Goals- Why are you getting a system in the first place?
  - ❑ Quick Wins to Keep Up Momentum
- ❑ Long Term Goals
  - ❑ We have the right data to pull metrics, it takes time to start seeing the data populate, but as it does you will see areas for improvement
  - ❑ Plan and Prioritize
  - ❑ Corporate Alignment- Can we support corporate Initiatives?
- ❑ Continuous Improvement: There could be some ugly metrics- however by implementing the CMMS you're taking the first step to improving those faults.



## Goal Examples (Getting Buy In)

Step 1: Use Goals for Buy In/Justification for a new solution

Step 2: Also to outline an implementation path for the solution

- ☐ Reduction in Downtime
- ☐ Increased On Time Work Order Completion
- ☐ Access to KPIs/Reports for Compliance
- ☐ Reduced spend in Parts
- ☐ Faster Turn Around Time
- ☐ Improved Customer Satisfaction

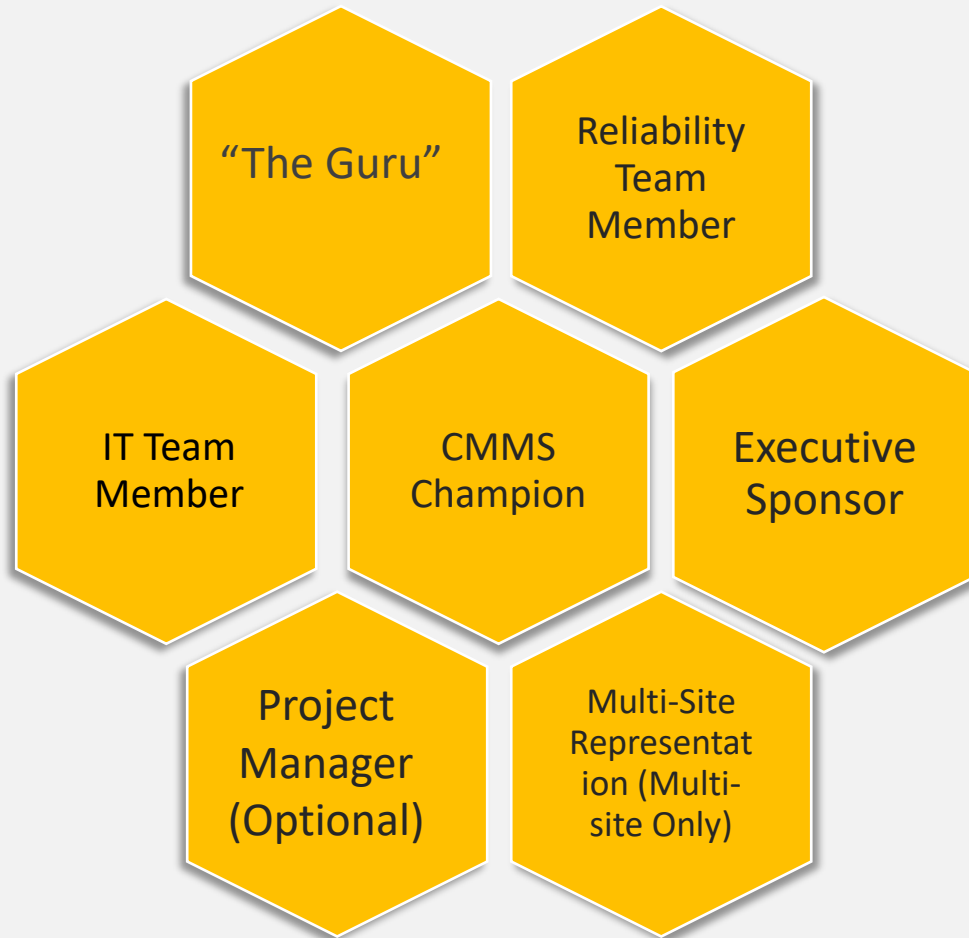
Include case studies

The background of the slide is a dark, grayscale photograph of an industrial facility, possibly a power plant or refinery, with complex piping, structural steel, and machinery. A large, white rectangular box with a thin yellow border is centered on the slide, containing the main text.

**A Goal without a Plan is Just a Dream**

# Form Your CMMS Implementation Team

## Customer Team



## Vendor Team



## Planning For Success

- ❑ Plan a Timeline
  - ❑ Allocate enough time to implement and gather data.
  - ❑ If possible Plan to put it in budget a year in advance
- ❑ Multi-site
  - ❑ Alert Sites of upcoming change
  - ❑ Helpful Channels or Groups to discuss feedback/ Usage
- ❑ Plan for the Future
  - ❑ Change Management



# Choosing the right CMMS/EAM Vendor Partner



# 10 Things to Consider for a Vendor Partner

1. Features
2. User Friendliness
3. Experience/Longevity in the Industry
4. Do they have documented processes for transparency? (data conversion, Implementation, training)
5. What does Training Look Like?
6. What does Support Look Like?
7. Are they truly a vendor partner or just a CMMS provider? (Ongoing Support & Continuous Improvement)
8. Do they provide additional best practices offerings to help my maintenance and reliability knowledge?
9. Can I solve my immediate problem but also have room to grow?
10. What Does their future roadmap look like?

## Checklist for selecting a CMMS software solution

Helping you determine the best computerized maintenance management system software for your organization.

We understand there are multiple CMMS and EAM solutions in the marketplace today. Determining which one is the best fit for your organization can be a lot of work. Below is a comprehensive list of features, services, and training to help cut through the clutter and help you differentiate.

eMaint has helped 150,000 users worldwide better manage, monitor, and control maintenance operations, resources, equipment and compliance.

150,000+ users

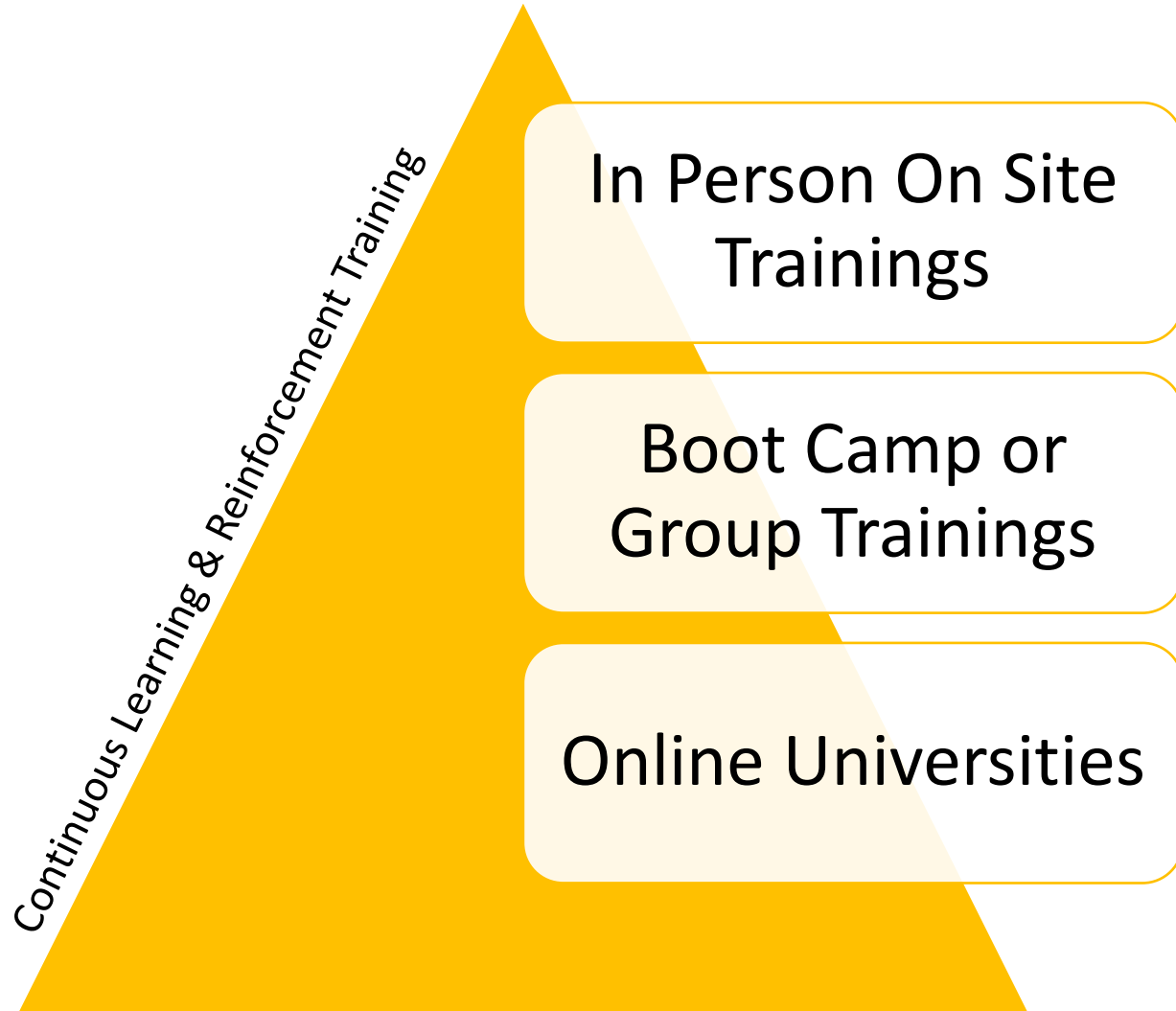
116 countries

7600+ maintenance tasks helped

3.4M work orders created

Please use this tool to see how other solutions stack up against the most desired capabilities in eMaint	eMaint	Vendor #2	Vendor #3	Vendor #4
<b>VENDOR CUSTOMER PARTNERSHIP</b>				
Over 35 years as a leading CMMS system.	✓			
First CMMS provider to deliver a 100% online SaaS Solution.	✓			
State-of-the-art training centers in Florida, Washington, and Germany.	✓			
An ever-growing list of international languages: Bulgarian, Chinese, Czech, Dutch, English, Estonian, Finnish, Georgian, German, Hungarian, Indonesian, Italian, Japanese, Kazakh, Korean, Polish, Portuguese, Romanian, Russian, Serbian, Slovak, Spanish, Thai, Turkish, Ukrainian.	✓			
Robust global multi-site management tools including support for time zones, in-app translation, and currency conversion.	✓			
18 office locations in 20 countries around the world providing support, service, and development.	✓			
Long tenured customer support personnel are all certified product specialists, with many coming from industry.	✓			
Bi-monthly product updates performed by a global in-house development organization.	✓			
<b>INDUSTRY AWARDS &amp; RECOGNITION</b>				
Recognized as an Industry Leader in the G2 CMMS Grid for Spring 2024	✓			
Recognized as Fastest Implementation in the G2 CMMS Grid for Spring 2024	✓			
Recognized as Best Estimated ROI in G2 CMMS Grid for Spring 2024	✓			
Recognized as Software Advice Front Runner in Maintenance Management in 2024	✓			

## Don't Forget the Training!



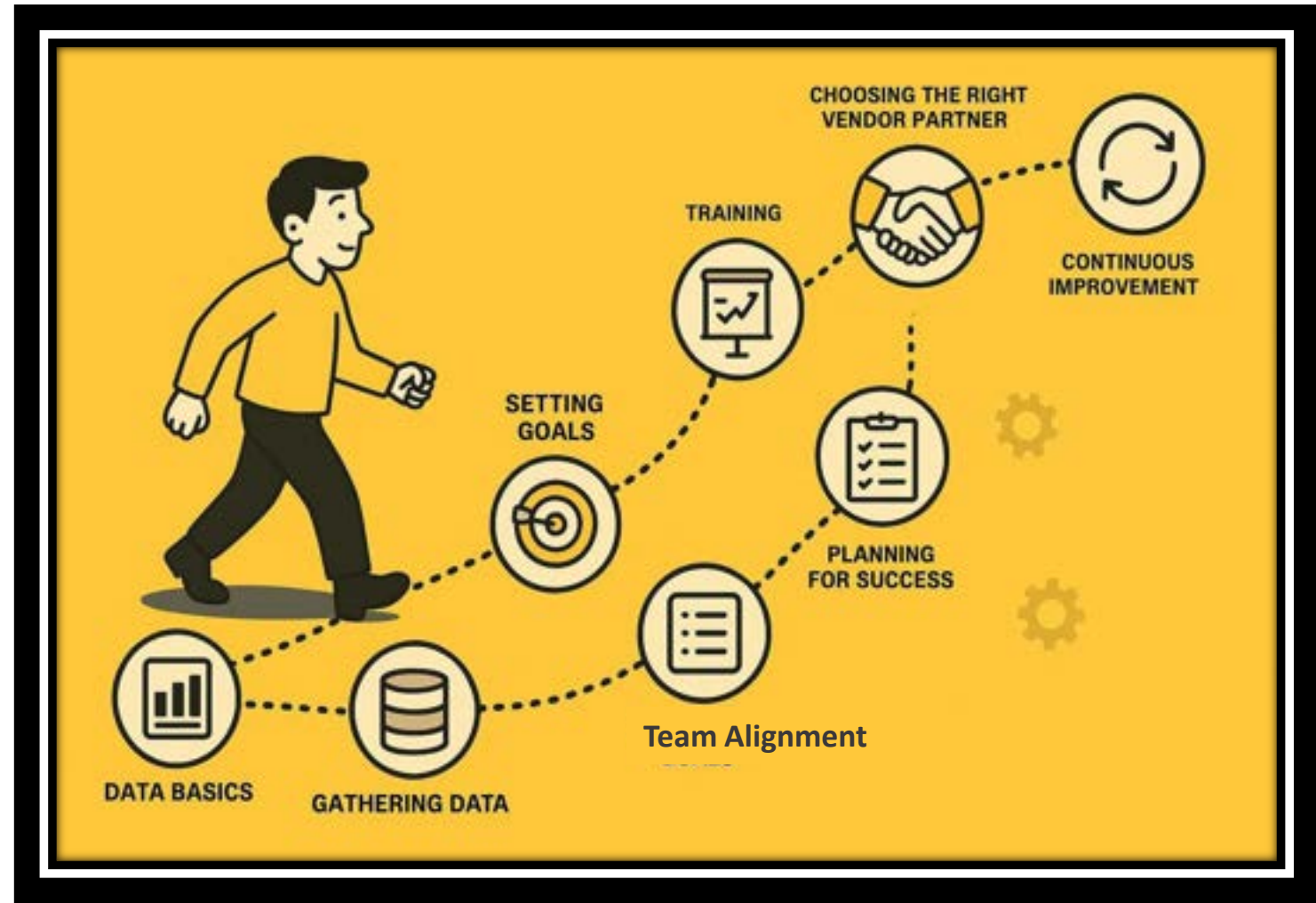
**Training is KEY to adoption & Long Term Success**



## In Summary

The Journey of 1000 Miles  
begins with a single step

- Start with Good Data
- Set Goals
- Choose the Right Vendor Partner
- Allocate Time to Implement
- Train the Team
- Continuous Improvement



# QUESTIONS?



Thank you for your time!

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**THANK YOU!**