

The background is a collage of industrial images: blue electric motors, large metal gears, and a worker in a hard hat and safety vest. A white geometric grid is overlaid on the collage.

FLUKE®

Reliability

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

Best Practices Webinar Series

Meet the Speakers



Michael Mills

Technical Sales Manager

- Focused on ensuring complex business needs are met with clear, effective technical solutions with over a decade of hands-on experience in CMMS/EAM and asset reliability.
- Specializing in enterprise software deployments, system upgrades, and scalable process improvements.

Meet the Speakers

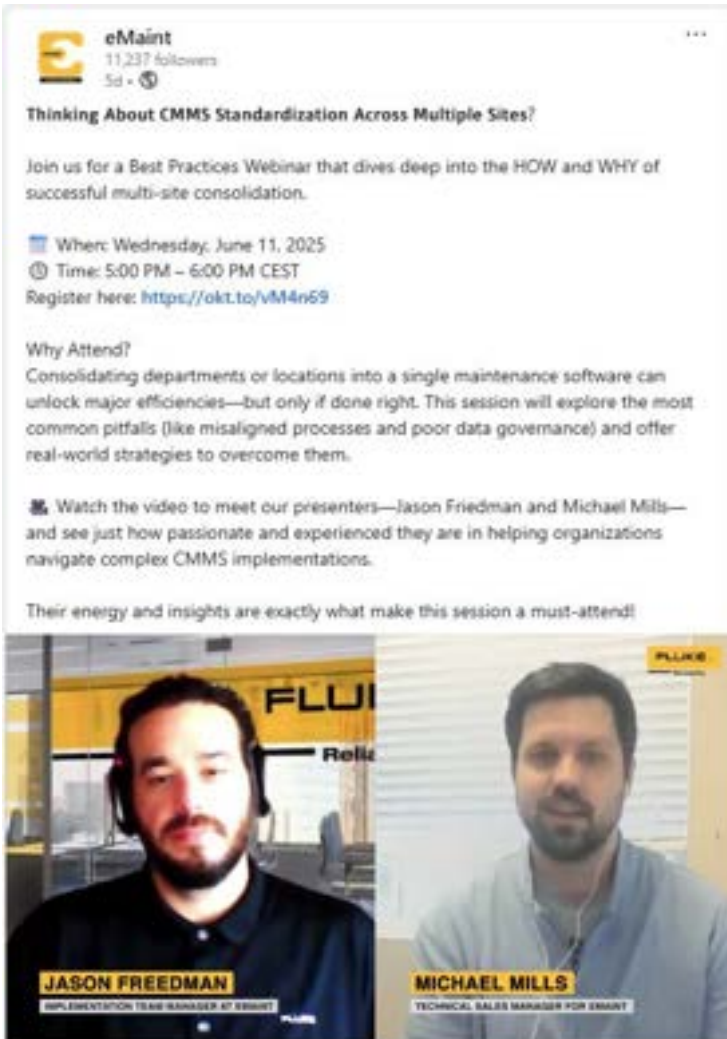


Jason Friedman

Manager - Implementation

- Over 7 years of experience delivering high-performing CMMS implementations across industries worldwide—focused on managing risk, ensuring data integrity, and executing smooth rollouts for successful onboarding.
- Leads a global team of Implementation Specialists, combining eMaint knowledge with industry experience to turn business needs into effective CMMS solutions.

Join Us: Upcoming Webinar You Won't Want to Miss



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

Consolidating sites or departments into one CMMS boosts efficiency—but without a plan, progress can stall. Join Jason Friedman, Head of Implementation at eMaint, as he shares common pitfalls like misaligned processes and poor data governance. Learn proven strategies to standardize successfully and drive long-term results across your organization.

- Date: Wednesday, June 11th
- Time: 11:00 AM EST, 8:00 AM PST

Agenda



The Standardization Wave



The Case: A Company's Rush to Standardize



Top 10–15 Pitfalls We See Most Often



Fixing the Mess: How They Got Back on Track



Key Takeaways + Audience Q&A

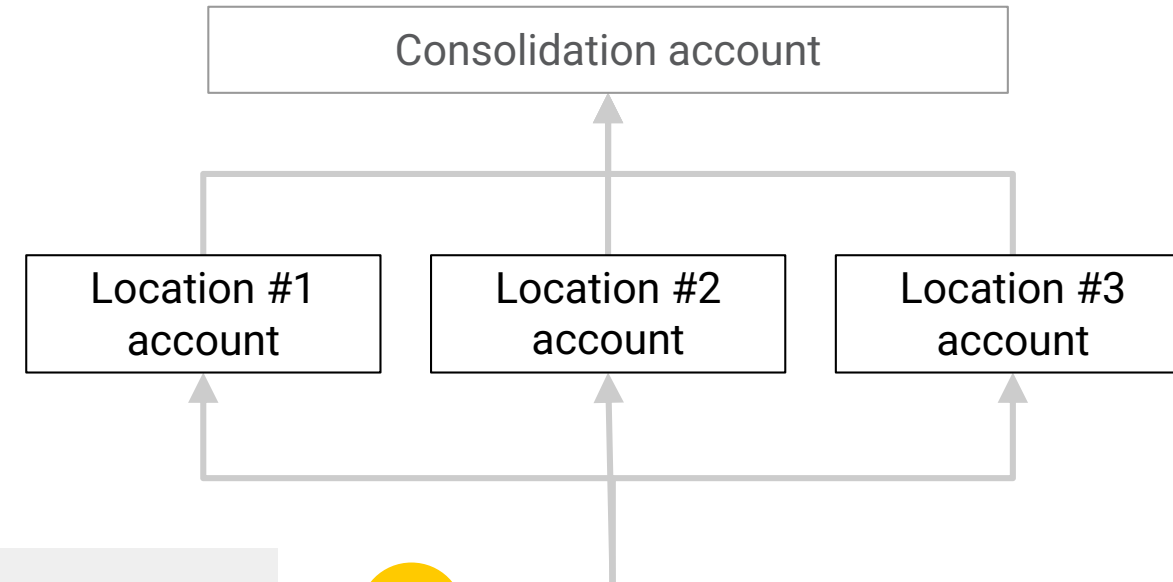
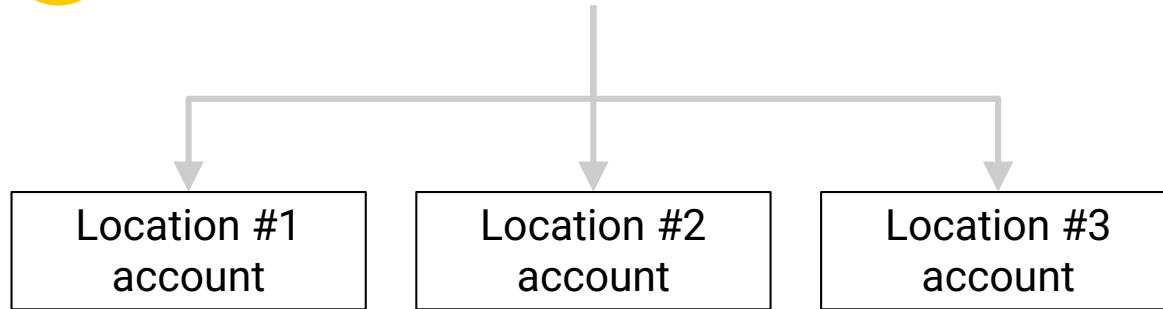
The Importance of Global Standardization

- A level playing field to:
 - Improve benchmarking
 - Reduce data silos
 - Streamline change management processes
 - Reduce Training Time
 - Cost effectiveness



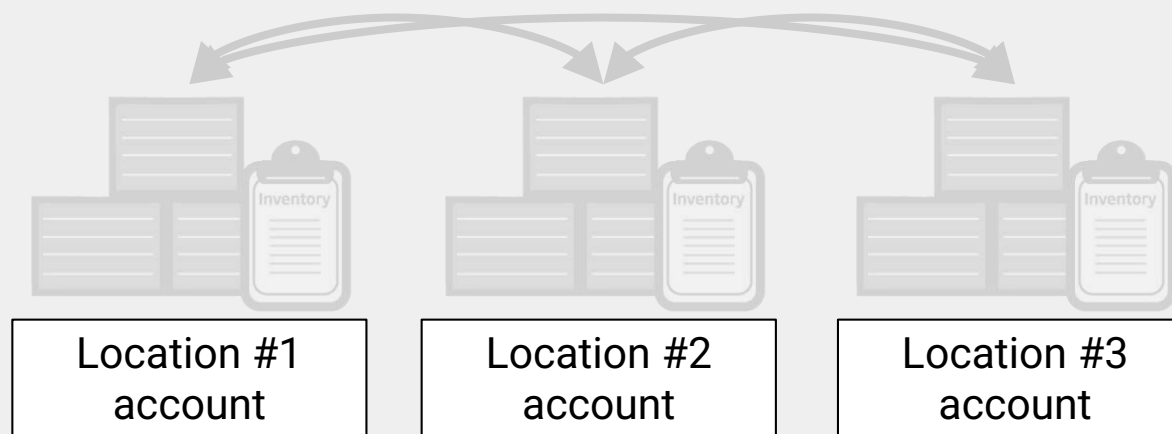
Multi-site roll out capabilities

1 “Push out” standardized SOPs

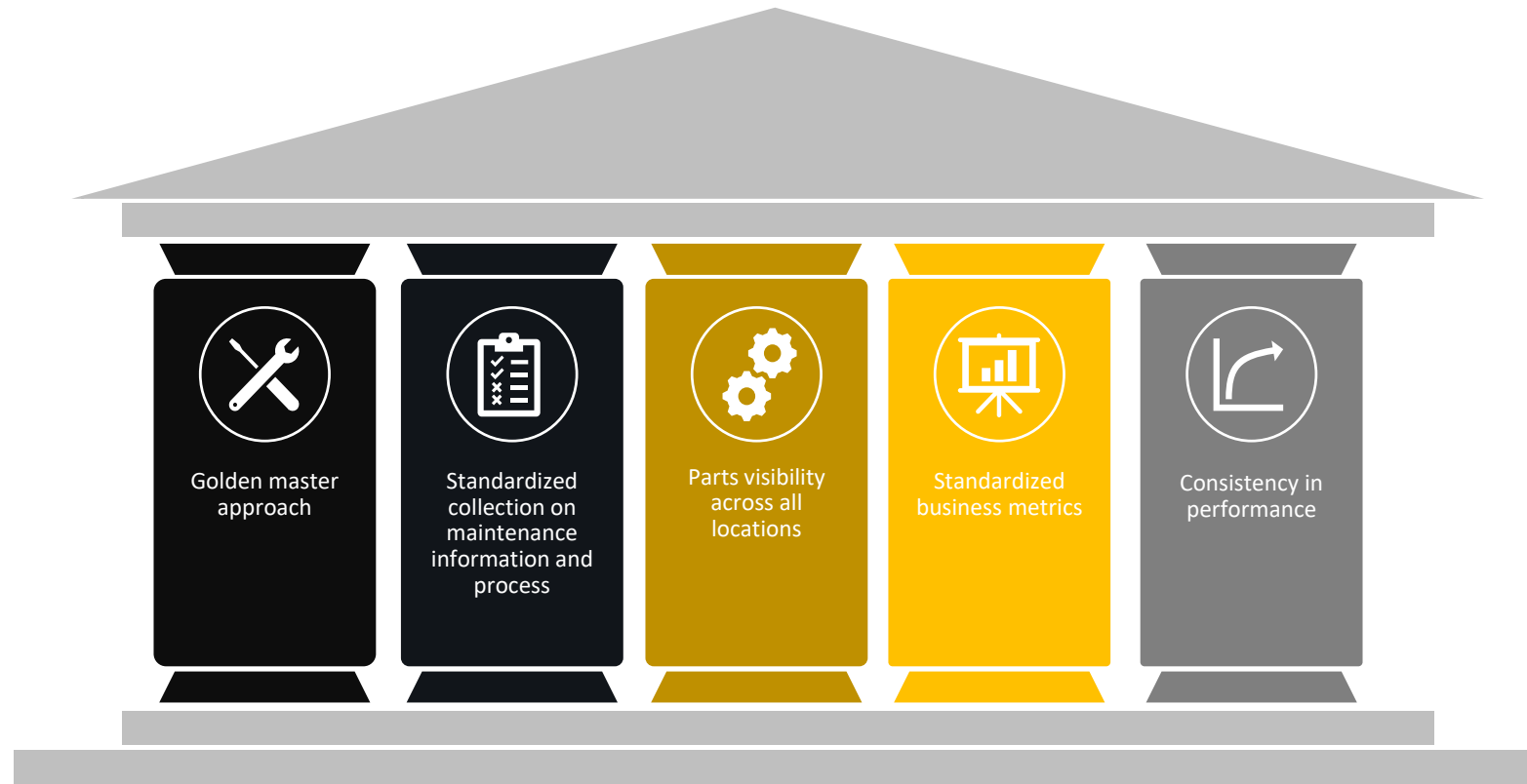


2 “Roll up” corporate data

3 Multi-location inventory visibility



A strong foundation



Deploying CMMS across the organization allows you to extend the life of assets, reduce maintenance costs, and increase visibility and transparency.

POLL QUESTION



What's been your biggest challenge when trying to standardize across multiple sites or departments? (Click only one answer)

- Getting alignment across teams
- Cleaning and consolidating data
- Managing change and resistance
- We haven't started yet—still planning

Survey



What's been your experience with customers trying to standardize across multiple sites or departments?

- <https://forms.office.com/r/Tr8smX9VkE>
- Give us your BEST story as it relates to a customer consolidation/ standardization project
- Give us your WORST story as it relates to a customer consolidation/ standardization project
- **We will not share customer information in the webinar**



“Silver Bullet”

- The CMMS / EAM is designed to support Asset Management best practices that are in place; not create them.
- The real ROI comes from how teams **think, act, and make decisions**—not just how they log work orders
- Success requires a company-wide cultural shift towards proactive maintenance strategies, beyond just CMMS/EAM adoption.
- The above assumes the organization **wants** to use their CMMS/EAM platform to support their M&R / Asset Management visions and missions. If not - then the CMMS/EAM is nothing more than just a Work Execution / Work Ticket system.

Pitfall Themes



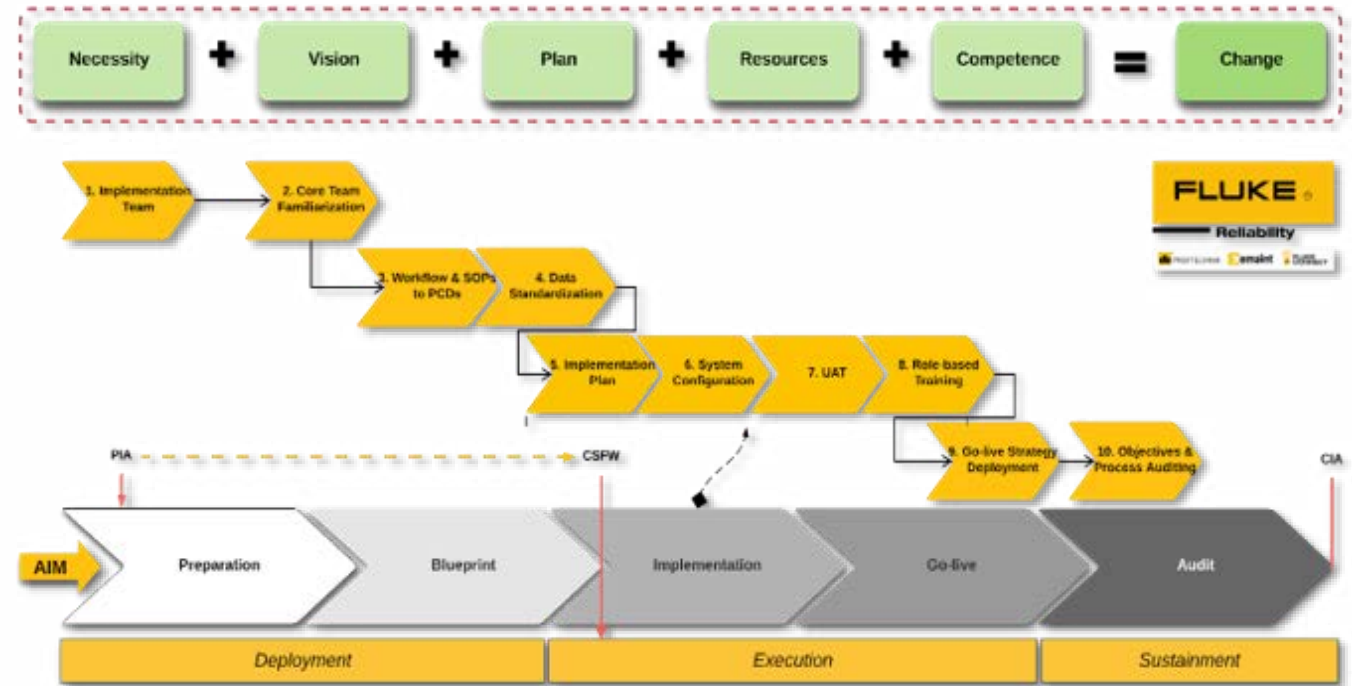
“The most expensive CMMS implementation mistake isn’t choosing the wrong system—it’s assuming everyone will use it the same way.”



Strategic Misalignment

Failure to Phase the Rollout Strategically

- Phase by division, locale, resource availability, etc.
- Standardizing Before Understanding Site Maturity Levels
- Misjudging the Politics of “Global” Decisions
- Account for Global Rollout Fatigue



Bigger Picture - Best Practices

#

10 Keys

10 key steps to CMMS success

June 10, 2020



Experts estimate that up to 70 percent of initial CMMS implementations fail to meet expectations. A CMMS implementation is not just about CMMS data. It also involves centering empirical asset health data within your own cohesive synergy involving people, processes, and technology. In this webinar, Gregory Perry, Fluke Reliability Senior Consultant, explores the 10 key steps that bring a focus and guidance to implementing your CMMS, setting you up for success.

Gregory Perry, Senior Consultant, Fluke Reliability

Join Us: Upcoming Webinars You Won't Want to Miss



Best Practices Webinar: I need a new CMMS, but where do I start? Things to consider for a successful CMMS transition

- In this best practices webinar, we will discuss some of the most common questions that arise when looking to begin a CMMS transition. These topics include:
 - - Where is my data and how to migrate it?
 - - Getting organizational buy in
 - - Choosing the right internal team for the transition
 - - Setting up short and long term goals for achievement
 - - How to align for success
- PRESENTER: Tara Acree, Enterprise Account Executive, eMaint
- Wed, Jul 16, 2025 11:00 AM - 12:00 PM EDT



Adoption & Engagement (People-Centered Pitfalls)

User Involvement / Role Clarity

#1

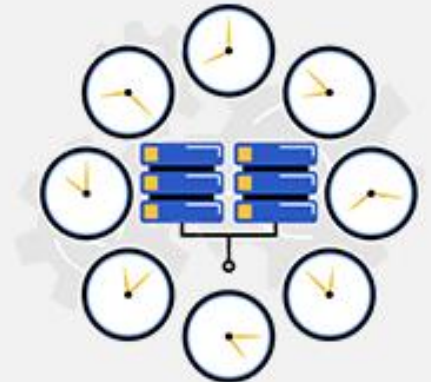
- **Assuming IT Ownership = Success (Myth)**
- Select an Actively Engaged System Administrator
- Focus on Practical Needs, Not Assumptions
- Avoiding Overloading the system with Unnecessary features
- Learn from Common Challenges & Past Experiences



System Design & Data Pitfalls

Standardized Reporting

- Identifying the reports that everyone wants to have to avoid rework and recreation of dashboards/reports.
- Define global metrics and KPIs, create recommended additional dashboards and reports for guardrails and visibility.
- Create internal definitions and document the how and the why. This becomes important in educating and engaging the broader team as sites continue to roll-out.



Roles & Permissions & Global Change

Account Settings Roles Administrator	
Work Order Individual Charges View	<input type="checkbox"/> Read Only
Work Order Labor Charges View	<input type="checkbox"/> Read Only
Work Order Requests	<input type="checkbox"/> Add Comments <input type="checkbox"/> Approve <input type="checkbox"/> Create <input type="checkbox"/> Archive <input type="checkbox"/> E-mail <input type="checkbox"/> Export to CSV <input type="checkbox"/> Export to PDF <input type="checkbox"/> Import CSV <input type="checkbox"/> Reject <input type="checkbox"/> Restore <input type="checkbox"/> Switch Form <input type="checkbox"/> Edit
Work Order Types	<input type="checkbox"/> Create <input type="checkbox"/> Archive <input type="checkbox"/> Export to CSV <input type="checkbox"/> Export to PDF <input type="checkbox"/> Import CSV <input type="checkbox"/> Restore <input type="checkbox"/> Edit
Work Orders	<input type="checkbox"/> Add Comments <input type="checkbox"/> Close <input type="checkbox"/> Complete <input type="checkbox"/> Create <input type="checkbox"/> Archive <input type="checkbox"/> E-mail <input type="checkbox"/> Export to CSV <input type="checkbox"/> Export to PDF <input type="checkbox"/> Import CSV <input type="checkbox"/> Open <input type="checkbox"/> Re-open <input type="checkbox"/> Re-schedule <input type="checkbox"/> Restore <input type="checkbox"/> Signature sign-off <input type="checkbox"/> Switch Form <input type="checkbox"/> Edit
Yes No	<input type="checkbox"/> Create <input type="checkbox"/> Archive <input type="checkbox"/> Export to CSV <input type="checkbox"/> Export to PDF <input type="checkbox"/> Import CSV <input type="checkbox"/> Restore <input type="checkbox"/> Edit
eMaint Condition Monitoring Alarms Events	<input type="checkbox"/> Create <input type="checkbox"/> Archive <input type="checkbox"/> Export to CSV <input type="checkbox"/> Export to PDF <input type="checkbox"/> Import CSV <input type="checkbox"/> Restore <input type="checkbox"/> Switch Form <input type="checkbox"/> Edit
eMaint Condition Monitoring Component Status Change Events	<input type="checkbox"/> Create <input type="checkbox"/> Archive <input type="checkbox"/> Export to CSV <input type="checkbox"/> Export to PDF <input type="checkbox"/> Import CSV <input type="checkbox"/> Restore <input type="checkbox"/> Switch Form <input type="checkbox"/> Edit

- Ensuring the information in the fields is correct and according to the dropdowns, and that the fields are not duplicated.
- What does a global change mean?
- How does a change happen?
- How does this evolve in the long term?

Workflows / Work Design

#3

- Ensuring existing business workflows are re-enforced
- Different applications / departments may have various approval processes
- Integrations create additional complexity

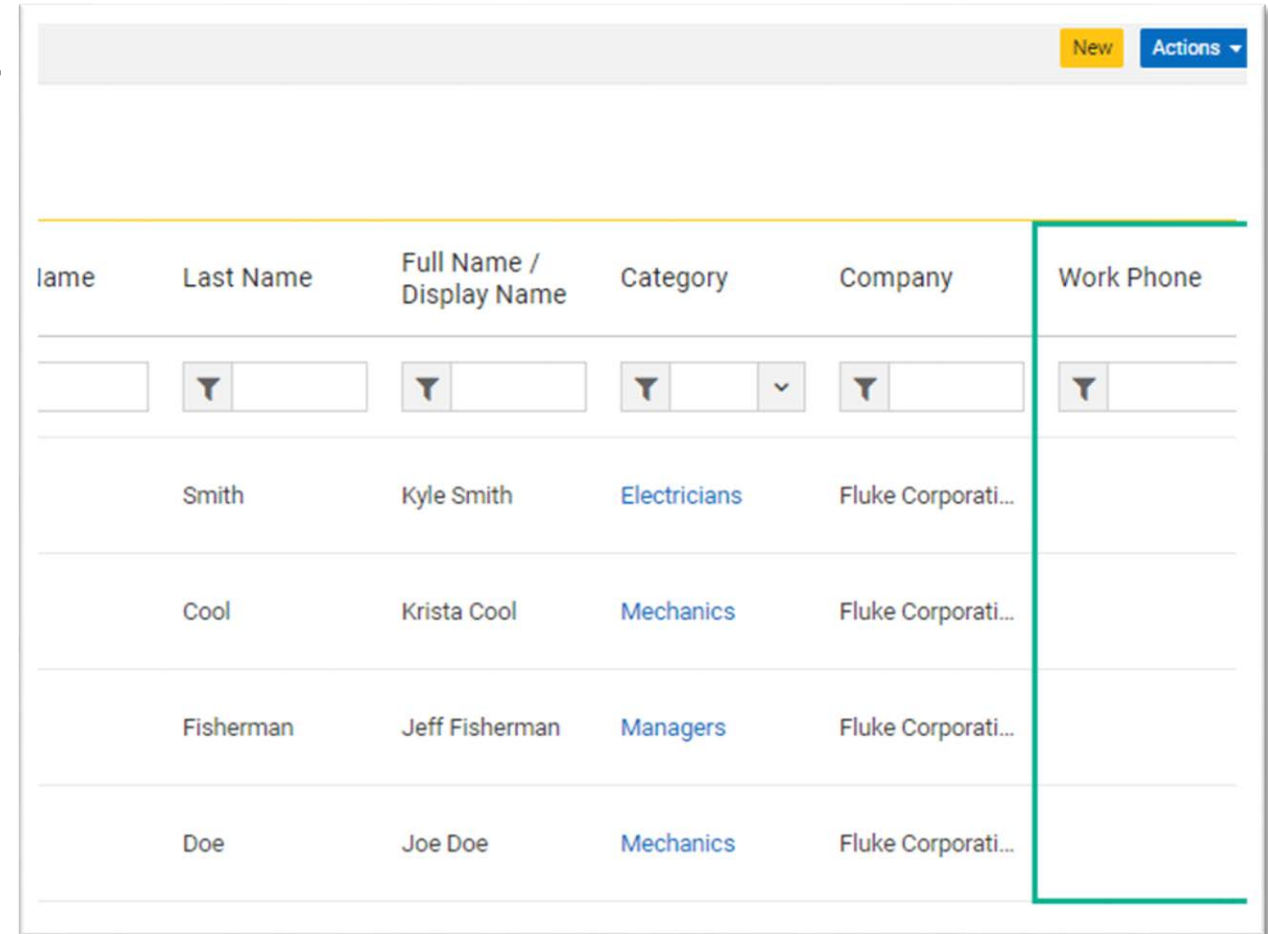


It's easier to pack when you have everything in one place



Completeness of Data

- Importance of filling out all required fields for tasks, procedures, calendar PMs, assets, contacts, etc.
- Creation of an internal data collection and validation process to ensure timely and accurate data loading into both the sandbox and live environments.
- Reduce back and forth communications, reduce possible import errors. This becomes a repeatable process with continuous improvement as each site implements.

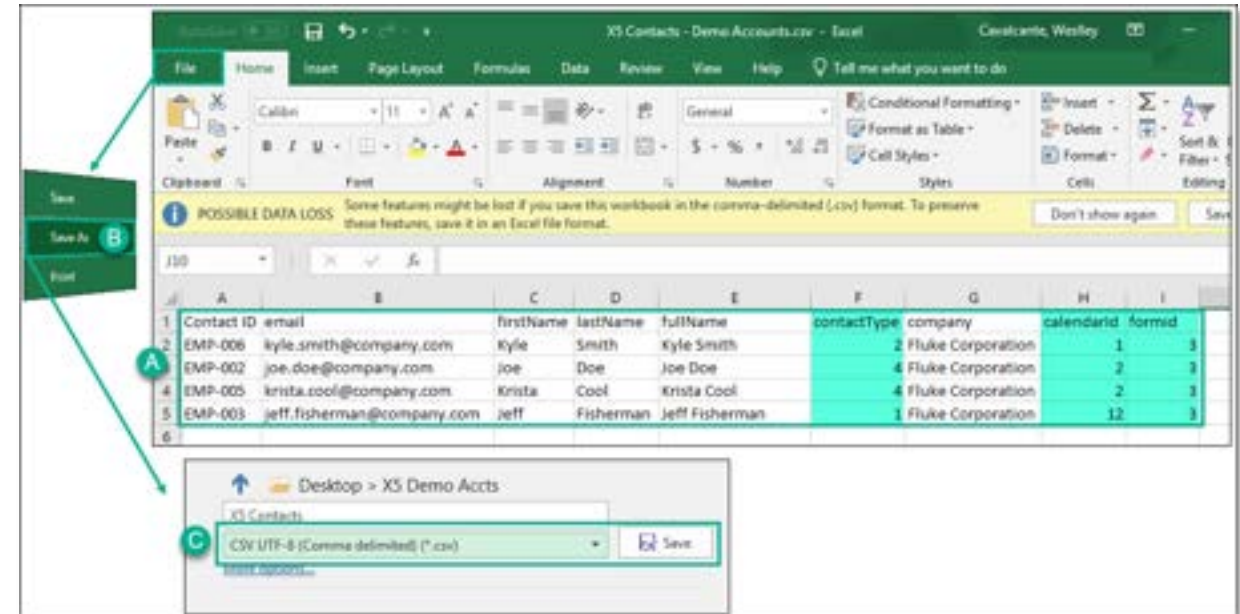


Name	Last Name	Full Name / Display Name	Category	Company	Work Phone
	Smith	Kyle Smith	Electricians	Fluke Corporati...	
	Cool	Krista Cool	Mechanics	Fluke Corporati...	
	Fisherman	Jeff Fisherman	Managers	Fluke Corporati...	
	Doe	Joe Doe	Mechanics	Fluke Corporati...	

Importance of Clean Data

- Different database structures and missing fields between CMMS platforms
- Siloed data with no shared asset hierarchy or standard master data
- Manual entry errors like typos, duplicates, or ambiguous labels
- Outdated or irrelevant records that no longer reflect current operations
- Inconsistent naming, units, and formatting across systems or spreadsheets
- Uncontrolled user permissions leading to inconsistent edits and data quality

Prioritize standardization before migration, even if it takes extra time.



Post-Migration Review

- Undercover Data Integrity Issues
 - Missing data, incorrect asset hierarchies, or misaligned inventory quantities may persist.
 - Leads to maintenance delays, incorrect work orders, stockouts or overstock, decreased system trust, potential reimplementation.
- Local Business Rules and Processes Overwritten
 - Standardization can unintentionally override unique site configurations (e.g., inspection intervals, naming conventions, permit workflows).
 - Results in non-compliance with local safety or regulatory standards, confusion among technicians, and disruption of established workflows.
- Incomplete User Adoption and Training Gaps
 - Sites may not identify gaps in user permissions, role configurations, or required custom fields.
 - Limits effective system use, creates reliance on offline workarounds or spreadsheets, and undermines reporting accuracy and central decision-making.

Shared Task Library

- The need for a 'Site' field in the Task entity to filter tasks for each site.
- Inconsistent Task Definitions
 - Varying task names, descriptions, or steps lead to confusion and inconsistent execution.
 - Technicians may waste time clarifying or adjusting tasks on the fly.
 - Increases risk of errors, rework, and safety issues.
- Misaligned Parts, Labor, and Time Estimates
 - Tasks may reference incorrect parts or labor needs for certain sites.
 - Inaccurate time estimates disrupt scheduling and resource planning.
- No Centralized Repository Today
 - Users create local versions instead of improving shared records. SOPs in disparate QMS or DMS systems

Inventory Standardization

- Duplicate and "Near Match" Part Records
 - Duplicate parts lead to inflated inventory levels and unnecessary reordering.
 - Wasted time identifying the correct part, delaying repairs and reducing wrench time.
 - Redundant stock drives up carrying costs and increases the likelihood of obsolete inventory.
- Conflicting Part Identifiers and Units of Measure
 - Inconsistent use of vendor, supplier, or manufacturer part numbers creates confusion in procurement and reordering.
 - Mismatched units of measure across sites can cause under- or over-ordering, leading to stockouts or surplus.
 - Operational delays occur when incorrect parts are delivered, or inventory levels are misrepresented.

The screenshot displays the 'emaint' software interface for managing parts. The 'Parts' section is active, showing a list of parts with columns for 'Is Default', 'Created On', 'Updated On', 'Reorder Point', 'Reorder Quantity', 'Use Max Quantity Reorder', and 'Location'. Two parts are listed:

Is Default	Created On	Updated On	Reorder Point	Reorder Quantity	Use Max Quantity Reorder	Location
True	2021-6-29 17:14:3	2021-6-29 17:41:4	5	25	False	Default
False	2021-6-29 17:14:3	2021-6-29 17:14:3	10	20	False	Default Spares

The 'Update' modal is open, showing fields for 'Reorder Point' (5), 'Reorder Quantity' (25), and 'Use Max Quantity Reorder' (True). The 'Location' dropdown is set to 'Default - Critical Spares'. The 'Part Locations' table below the modal shows the same two parts as the main table.

Field Type Consistency

- Issues arising from changing field types during migration.
- Recommendation: Plan and execute a careful field mapping exercise before migration.

The screenshot shows a 'Custom Field' configuration interface. It has three main input sections: 'Label' with an empty text box, 'Name' with a text box containing 'c_', and 'Type' with a dropdown menu. The dropdown menu is open, showing a list of field types: Boolean (True / false value), Currency (Any currency), Date (Date field), Date and Time (Date and time field), and Document (Document upload field). Each type is accompanied by a small icon.






Custom Field

Label *

Name *

Type *

Select field type...

-  **Boolean**
True / false value
-  **Currency**
Any currency
-  **Date**
Date field
-  **Date and Time**
Date and time field
-  **Document**
Document upload field

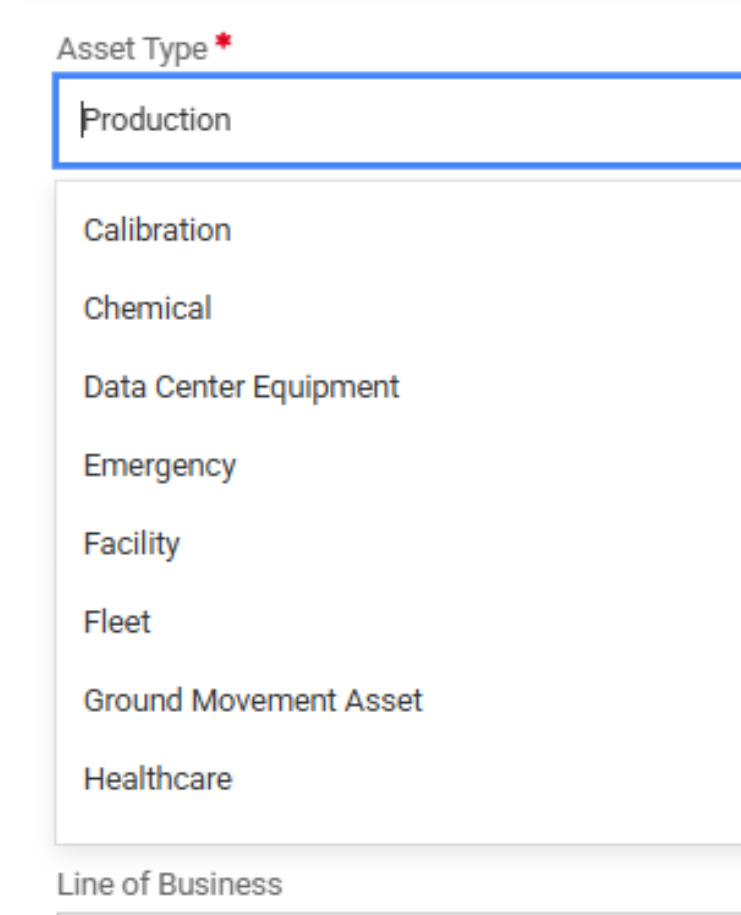
Avoiding Field Duplicates

- Issues with duplicate fields and their impact on drilldowns and mapping.
- Recommendation: Clean up and ensure no duplicate fields in the system before migration.

The screenshot shows a web-based configuration interface for a system. At the top, there is a search bar containing the text 'site'. Below the search bar, the interface is divided into two main sections: 'System and Standard' and 'Custom'. The 'System and Standard' section contains a single field labeled 'Site'. The 'Custom' section contains a list of fields: 'Site (Plant Location)', 'Site Address', 'Facility (Site Location)', and 'Site (emplacement de l'usine)'. Each of these four fields in the 'Custom' section has a red 'X' icon to its right, indicating a duplicate or conflict. A yellow warning banner at the top of the 'Custom' section reads: '⚠ Changing fields will affect forms and reports'. A blue 'New' button is located in the top right corner of the 'Custom' section.

Standardizing Selectable Field Options

- The decision on whether dropdowns should be separate or the same for all (type of work order, priorities...)
- Global vs site, department vs corporate specific dropdowns (translatable).
- The idea is to standardize as much as possible. Every time we create a different form or process it adds to the possibilities of human error when dealing with data governance and proper KPI and metric reporting.



Asset Type *

Production

Calibration

Chemical

Data Center Equipment

Emergency

Facility

Fleet

Ground Movement Asset

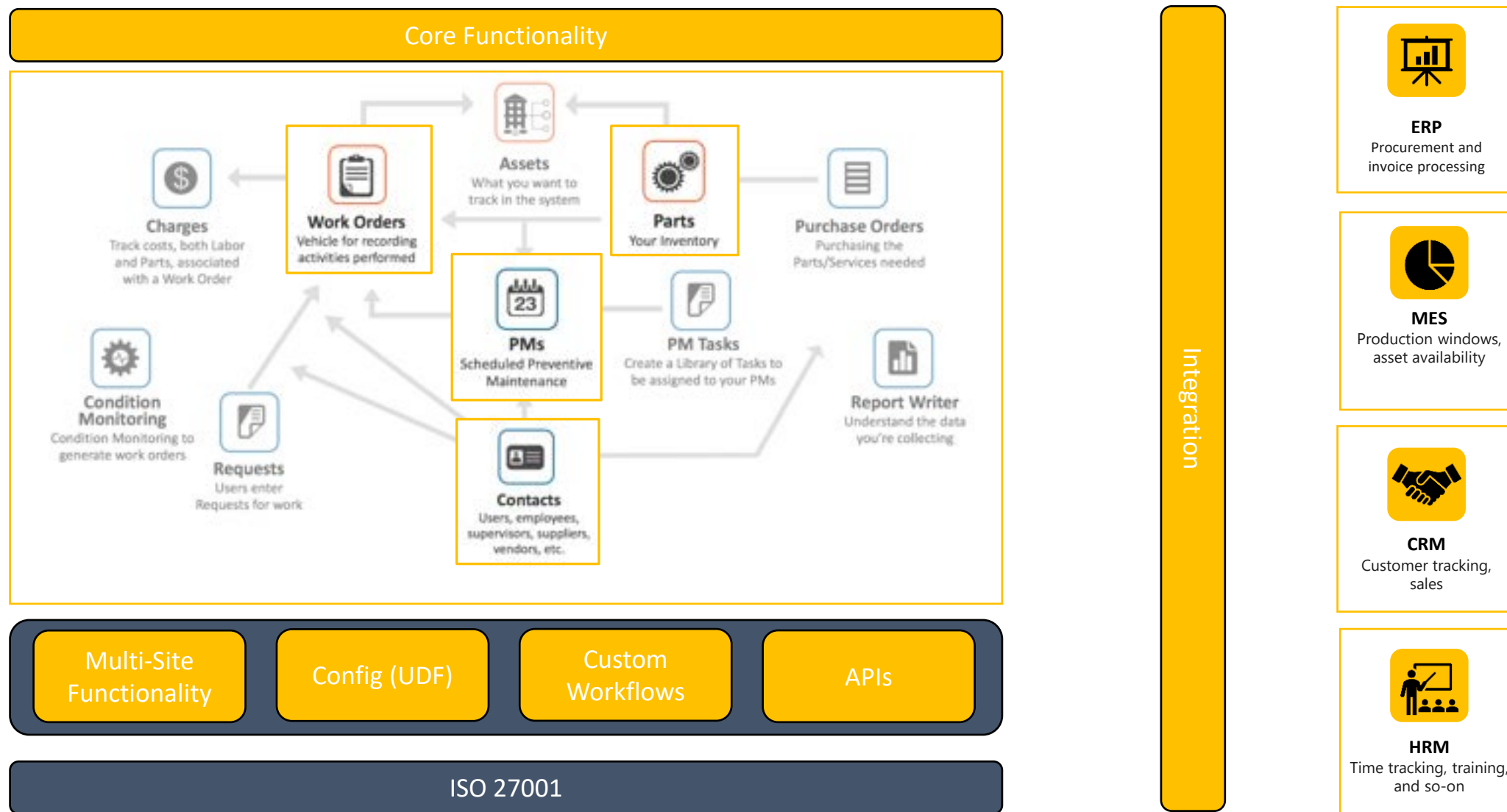
Healthcare

Line of Business



Bottom Line Impacts (Financial & Operational Risk)

Failing to Account for Existing System Integrations



No Feedback Loops for Continuous Improvement

- Keep momentum going year-over-year
- Using data to drive decisions
- Define key metrics (include examples)
- Establish a review process and team (CMMS User Group) – responsible for SOPs
- Establish IMMEDIATELY after Go-Live to ensure bad habits are not allowed out of the gate





Fixing the Mess: How To Get Back on Track

The Concept of 'Golden Master'

- A System-wide set of standards designed to best capture and report on critical data and processes.
- Including all plants in the system or, if not, classify them by "plant type" or division to avoid configuration issues.



Playbook for Success

- Cross-function beginning
 - Look to identify the groupings, plant types, or divisions – I.E Facilities, Maintenance, Calibration
 - Utilize the voices within your organization to help produce the best set of standards.
- Design towards standardization
 - Avoiding the path where each site can have a different configuration or forms.
 - Utilize eMaint's ability to create reference tables (Drop Downs) that are either Shared (Work Order Type, Work Order Status) or Single Site (Building, Room)



It's easier to pack when you have everything in one place



Guide

Standard Users: *

Technicians: *

Do you have a CMMS Today? *

Service Requested *

What CMMS are you currently using?

Is this data a single site or multiple sites? *

Please give an estimate of the unique SKUs in your MRO inventory that is on-site and/or is in your current CMMS. (Not the total value, but the number of different parts being held at your site.) *

Provide an estimated number of repair parts and OEM parts. Do not include consumable items

What is the desired language for Training? *

What is the desired language for printed training materials? *

What is the address to which the training materials must be shipped? *

What is the name of the person to which the training materials will be shipped? *

Pre-Implementation Survey

Name *

Title

First

Last

Email *

Region or Location *

What are your primary goals for implementing an EAM/CMMS system? (Select all that apply) *

- ☐ Asset tracking and lifecycle management
- ☐ Preventive maintenance scheduling
- ☐ Work order management
- ☐ Spare parts and inventory tracking
- ☐ Regulatory compliance
- ☐ Mobile access and field technician enablement
- ☐ Reporting and analytics
- ☐ Integration with ERP/other systems
- ☐ Other

What challenges or pain points are you currently facing with asset and maintenance management? *

Do you have previous experience implementing or using EAM/CMMS systems?

No

☐

Yes

Summary

- **Keep It Aligned:** For a successful CMMS/EAM rollout, make sure it's in sync with your asset management goals and encourage a proactive approach to maintenance.
- **Clean Data is Key:** Standardized workflows, accurate data, and validation processes help avoid mistakes and ensure everyone uses the system consistently.
- **Get Everyone Onboard:** Involve users from the start, clarify roles, and provide solid training to keep adoption high and avoid people falling back on manual workarounds.
- **Find the Balance:** Standardize processes globally but leave room for local tweaks to meet site-specific rules without disrupting workflows or compliance.
- **Centralize Resources:** Shared libraries for tasks and inventory help cut down on redundancy, boost efficiency, and make operations smoother.
- **Keep Improving:** Use feedback loops and user groups after launch to keep refining the system and make smarter, data-driven decisions.
- **Plan for Success:** A cross-functional team should lead the charge on implementation, training, and standardization to set the foundation for long-term results.

QUESTIONS?



Thank you!

To learn more about **Fluke Reliability** and our **Webinar Series**



SURVEY

Please provide feedback on this webinar by responding to our survey. Do you want a Certificate of Attendance?



WEBINAR SERIES

Visit this page to learn more about our Webinar Series:
<https://www.accelix.com/community/best-practice-webinars/>



DEMO

Visit [Accelix.com](https://www.accelix.com) for a free demo of our Connected Reliability Framework.



FLUKE®

Reliability

THANK YOU!