CMMS - The Good, the Sordid, the Unexplainable

By Marshall MacFarlane - Senior FM, IFMA Fellow

I have been in Facilities Management for nearly three decades. In that time, I worked in manufacturing, tech, Higher Ed, and municipal government. Apropos to this article, I think I have selected and implemented three or four CMMS systems from scratch and have used several others. I have inherited a couple. I have gone without. What follows are some observations, ramblings and musings pertinent to CMMS systems. (I know the "S" in CMMS and "systems" is redundant, but - habit I guess)

First off, and most astoundingly - there are FM's out there STILL trying to justify to their organizations the need for a CMMS. My first reaction is to be insulted - for the profession. There are many organizations that see a CMMS system as a luxury. A want, not a need. Of course, any FM worth their salt knows this is nonsense. A CMMS is to a modern FM organization what Excel is to an Accounting Department. Can you imagine your Finance Department explaining why they need Excel, or QuickBooks or whatever? Maybe your Marketing Department should explain their need for Microsoft Word, or Adobe, or whatever. The truth is - this is a symptom of the FM Profession's "coming of age", and the poor job we have done communicating our value - direct bottom-line value, usually - to organizations. We need to do better, but that is a different topic for another day. If you are an FM out there struggling to get a CMMS - please reach out. I will happily aid in your justification efforts.

Second - once FM's have conquered the aforementioned issue - they often approach the selection of a CMMS system in a jumbled and disorganized manner. Or - worse - cost. Of course, cost is a factor for most of us, but it shouldn't be "the" factor. Why do you need a CMMS? The justifications you provided to your company should be a key to how you approach selection. What is the purpose? Or purposes? Customer service? Preventive Maintenance (PM)? Controlling costs? Inventory? Data? (What data?) What are your KPI's? What data markers align with your company's (and department's) goals? Asset life cycles? Ease of use? Integration with other platforms? How you plan to use your CMMS, and why - are critical factors to selection. I will say this - many, maybe most, companies buy Cadillacs when they need a Malibu. More on that later.

Workflow and Processes - we've all heard it. Heck, we've probably said it. "Garbage in, garbage out". Implementing and fine-tuning CMMS associated processes should be a lengthy and perhaps perpetual effort. How are WO's assigned? How are they approved? How are they finalized? Closed? Who checks for open WO's? Who does customer follow-up? How do you measure customer satisfaction? What data do you need? Is it timely and in units that make sense? Is costing included? Inventory? How do you include contractors? How do you re-assign? Who can do that? Most WO failures occur when they get handed off to someone else, mid-job. How do you assess labor hours? How do you ensure everyone is using the WO system? When I first arrived in Gilbert, we did a survey of how work was being requested. 40% was through the WO system, according to respondents. That means 60% of our work was being done "off the books". No wonder orgs can't effectively justify more staff, more budget, more resources. Good grief.

Data. Ah yes, the raison d'etre when it comes to a CMMS. As an organization, what data do you need? What data do you want? What data is nice to have? What one-off requests and odd situations really benefit from the custom reporting function? Are the terms, nomenclature and units in your CMMS standardized? Are the people outside of your organization getting the info they need? That they requested? Is it digestible? Is it delivered at the appropriate cadence?

Next - implementation. When you are talking to vendors is the time to be discussing implementation, training and rollout. Has there ever been a CMMS? Will this be new to everyone? Are you transitioning to a different system? How does that occur? Not just data migration, but on the Requestors' end. Your Techs and Supervisors. What are the goals, the expectations? How do you measure success? Like any change management exercise - if you don't communicate, allay fears and concerns, answer questions and promote benefits - this will fail.

Summary - my thoughts. A CMMS is a must have for any Facilities Organization bigger than two employees. It should be a common tool just like Excel, Word, E-Mail, PowerPoint, etc. Also important to note - it is a TOOL. To help, A force multiplier. In many of the FM Groups I led, I have had to preach "If you are a slave to your CMMS system, you are using it wrong". Don't let the tail wag the dog. My personal main reasons for having a CMMS are Customer Service, Data and PM Scheduling and completion. PMs are the essence of maximizing reliability, useful equipment life, and more. A calendar in the tech's office, or worse - "in their head" is BS. Sorry. Regarding Customer Service, I guarantee if you stop me in the hall and tell me about your flickering light - that notion is long gone by the time I get to my office, and you will be mad in two months when it hasn't been corrected. A CMMS (with good processes) makes it very hard to lose track of work. They enable communication and follow-up. Even the most basic data (who/who often/when/why) allows you to identify trends in equipment, personnel, costs, labor, etc. Knowledge is power. This data can tell you what you do well, and what needs work. A word to the wise - it may be counter-intuitive but if you are short staffed (truly, not just inefficient) your goal may be to demonstrate what work is not getting done. That often tells a more striking story to people outside of your department. Working with your IT group warrants another article all its own. I have had good results; I have had struggles. Just remember, human nature will exist wherever humans exist. Along with that comes pride, tribalism, personalities, competition and more. All I can say is engage your IT group as an ally, communicate your needs, show yourself to be the organization expert on CMMS. They can help navigate security concerns, network structure, support, etc. "It's web-based" isn't a cure-all. Neither is it a guarantee that it won't put any burden on your IT team. We all know that when the WO system isn't working, Sally's first call is to IT, not the CMMS Support Team, as trained and instructed. Talk these things out. For the selection process, make it collaborative. Maybe everyone doesn't get a vote, but they all should have a say. Engage as many stakeholders as possible so you don't miss anything with your bias. If it's not easy to use for people entering work orders, they won't use it. If it's not easy for your techs to add notes or labor, they won't use it.

Many CMMS companies highlight the benefit of their platform working on tablets and smart phones. Ten years ago, I scoffed. The only techs that were doing WO tasks on their tablets and smart phones were the ones made to do it that way. That trend is changing, and it makes sense. As the "generation" demographic of FM orgs shifts, so does inherent technical savvy (thank goodness). The option for tablets and phones should be a key part of your input, evaluation, selection and workflow process for sure. Times they are a-changin'.

One last thought, current as of yesterday. Many or most CMMS companies will claim that you can migrate the data from the old system into the new system. Beware, and have a plan for archive/access/recovery. As of July 15th, 2024, in my personal experience, a seamless migration has yet to be seen. I attribute this mostly to the fact that there is no industry standard for nomenclature. Assets, which are the very foundation of a CMMS, are not named the same across the industry. AH-1. AirHandler-1. AH #1. It is my belief that this is just one of the conundrums that AI will help sort through in the near future.

Have fun, good luck.