



IMPLEMENT A **MAINTENANCE SYSTEM** **WITH 7 SIMPLE STEPS**

– BONUS CHECKLIST INCLUDED



1#

2#

1#

Exe

1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40

10

1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40



Introduction

- 1 Appoint the right people
- 2 Describe your desired situation
- 3 Choose a maintenance system
- 4 Insert units and material
- 5 Harmonize with your processes
- 6 Adapt the system to the organization
- 7 User training

Bonus checklist



INTRODUCTION

Implementing a maintenance system doesn't need to be so complicated as it might seem. The thoughts easily divert towards large ERPs with their equally large and all-embracing projects.

Implementing a maintenance system, however, is not the same thing. Implementing a maintenance system is about finding the needs of the maintenance department and starting to use the parts of the system that fills the most pressing needs at the moment.

It's better to start with a limited part of the system rather than taking on all functions at once.

It's not different for larger companies, there are small maintenance teams at smaller companies that are more have come further than larger maintenance organizations on very large plants.

With this guide, you can define your requirements, get them on paper and use what you have come up with as a starting point when you start to implement your system.

The book should be seen as an example of how you can implement maintenance systems. There are of course many more ways to do so. In this book, we will focus on the way that demands the least amount of resources. Are you ready? Let's go!

1

Appoint the right people

The important thing is not how big or small the project is, it's about having a dedicated resource that keeps on pushing forward. The project manager will appoint the right roles and make sure that they are available during a short and limited time.

Our experience at Idus is that some maintenance organizations tend to get stuck in the implementation phase because they didn't think about giving a specific person some weeks or more to get everything done at once.

Instead, they let that one person do everything alongside their day-to-day job which ironically will delay the project four, five, or six times longer than necessary which will in turn postpone the benefits that comes when the system is in place.

Tip number one is to set aside time for all project members and not spreading out time over a too long period.





Give the project members time away from their ordinary activities to make sure that the implementation is moving forward smoothly. Most implementations go on for too long because no time was set aside.

Per Alm -
Application Consultant

Project Manager:

Activities - Time:

Project Member:

Activities - Time:

2

Describe your desired situation

Before you jump into the system modules, functions and appearance it's a good idea to decide how you want your organization to function in the future.

Start by describing your desired situation and what you wish to see improved with the system.

Examples of such things can be a larger share of planned jobs, more control in the maintenance store or better instructions.

Perform a brainstorming session where you write down all thoughts that come up. Don't assess the plausibility at the meeting instead allow ideas to flow freely.

Then you can go through item by item and prioritize what is most important in the next meeting.

Also, make sure to draw your current maintenance processes on a whiteboard. It doesn't matter if the process seems unorganized or inconsistent.

Take a photo of the whiteboard and draw how you wish your maintenance process to look like in the future when the system is in place.

When you've done so you are among the ten percent which have done the most preparations prior to their implementation. You have also saved yourselves much time and improved your focus.



How do you eat an elephant? By eating one small piece at a time. For some, work requests and levelregister can be a huge step forward. PMs and spare parts can be the next step when the organization is ready.

Per Alm - Application Consultant

Describe your desired situation

Describe a desired future scenario at the company:



TAKE INPUT FROM OTHER DEPARTMENTS

It's a good idea to take input from different stakeholders and other departments for example production, the electrical department, storeroom, purchasing, etc.

Involve relevant departments early and ask for their thoughts on how the routines can be improved with the new system.

Don't forget to tell the system supplier what you expect them to help you with. Each maintenance department have their own priorities and improvement areas.

If you are clear about what you wish to obtain then it will be easier for the supplier to come up with solutions and improvements.

Your desired situation and your expectations will form a good basis when the project days will be carried out later.

Talk to your industry colleagues that have made their journey already, how would they do things a second time knowing what they know? What did they do well?

If you are unsure about which company to contact you can always ask your supplier to establish a contact.



INPUT FROM OTHER DEPARTMENTS

1. _____

2. _____

3. _____

4. _____

3

Choose a maintenance system



Choose the right system for you

Choose what fits you best and keep in mind that different systems vary a lot.

There are large and advanced systems that unfortunately might hinder user adoption and there are reasonably sized systems that are easy to grow with.

Because you in step 2 defined your needs you can also define what the system needs to manage and what is unnecessary. You neither want to limit yourselves by choosing a too small system and neither lose user adoption by going for something too big.

Take the user perspective, it's the user engagement that will create success in the maintenance system and hence in all the improvements.

Another aspect to take into consideration is hosting. Do you want to install the system on your own server or do you wish to be 100% cloud based?

- Supplier 1 _____
- Supplier 2 _____
- Supplier 3 _____



Reflections on suppliers

Supplier 1

Supplier 2

Supplier 3

4

Input units, materials, etc.



Start with a soft implementation

Now when you've chosen a maintenance system it's time to start adding your units and materials in the store. It's also time to start adding PMs and inspections.

Here you should be supported by your system supplier that should balance objectives and have given strong recommendations about where to put the bar for the implementation to be easy, fast, and successful.

Such balances might be how the plant should be divided, how detailed the division should be, what technical data to put on the units, which costs to log right away etc.

It can also be a good idea not to put in all of the plant at once but to start putting in the most important units and adding the remainder gradually.

Try your process live in the organization. Take input from the users and ask them what they think should be done better from the beginning. Carry out necessary changes and try again.

It can also be a good idea not to put in too many PMs at once and thus having a hard time finishing all work orders.

- Start very small to just cover the requirements
- Go live with the system and take input
- Change the system after new insights and requirements

5

Harmonize with your processes



Align the system with your organization

Regardless if your about to implement a new maintenance process or if you are going to keep the old one it's now time to align your process with the system.

Many maintenance departments are similar but there are also things that differ. Some organizations lack maintenance planners and let technicians plan their own jobs.

Here the supplier should find a good solution together with you that fits your organization. A system can be just as suitable on a larger paper mill as in a smaller mechanical workshop. The trick is just to adapt the system so it will meet the organization's requirements.

A system should be adaptable enough for you to stay with well-functioning work processes. The system should be built upon best practices however and follow industry standards.

It's however a very good occasion to revise your processes and gather all involved shareholders to find out how they think things should function in the future. It can't be stressed enough how important the sense of involvement and ownership is for the project to succeed.

6

Adapt the system to the organization

Adapt the system

To further improve the ease of use focus should be put on shortcuts and other adjustments. It can be selectable failure codes, pre-configured titles and other presets that improve the ease of use. That way, the usage is faster and the willingness to embrace the system will increase.

Think twice about which information you really wish to receive from a closed work order initially. When the users are accustomed to the system you can gradually open more fields.

Some organizations only wish to know the time spent on the job while others wish to log failure codes and measures. The important thing is to again, start small and open new functions when ready.

The system you choose should contain a standard set of user groups, failure codes and titles applicable for all types of organizations. There should not be any large need for configuration to get going with your maintenance system.

Don't forget to involve the end-users before the implementation. Answer all questions that come up and involve the users in the final result. By transferring ownership to the end-users the project will reach the best possible result.

7

User training and go live

User training

This is the grand finale. The users, the jury if you wish will have their final verdict on the ease of use of the system. If it's a thumbs-down it will be hard to ask for a fresh start, if it's a thumbs-up you will see a success story and major positive changes for the entire company.

By now it shouldn't come as a surprise that we recommend a soft implementation. The key thing is to start using a smaller portion of the system and gradually become better and better.

This should also be communicated during the training. Do tell everyone that you are starting small to see if or when you will open up more modules after plant register, work requests, and inspections for example.

Then you can start another round of user training where you go through preventive maintenance, work orders, spare parts, etc. But, when it comes to improvements the most important thing is just to start with something small, the rest is easy. How do you eat an elephant? By eating one small piece at a time.

By going through all of the seven steps you should have reached a level of success required to make a huge leap in your coming maintenance journey.

But, the maintenance journey will actually never end. The journey will always keep on going, that's why it's important to take a little step at a time and to start small.



Checklist with questions before implementing a maintenance system.

IMPLEMENT A MAINTENANCE SYSTEM WITH 7 SIMPLE STEPS

- 1. Who is the project manager?
- 2. Is there an implementation group?
- 3. Which departments will participate?
- 4. How will the meetings be held?
- 5. Is there already plant data?
- 6. Are there any work instructions?
- 7. Are there any spare part-lists?
- 8. Who will submit work requests?
- 9. Who will receive work orders?
- 10. Will externals receive work orders?



Checklist with questions before implementing a maintenance system.

- 11. Which are our preferred milestones?
- 12. Who will be the system responsible?
- 13. Who needs to approve the project?
- 14. What is our system annual budget?
- 15. What is our implementation budget?
- 16. Who will analyze future reports?
- 17. What systems will be integrated?
- 18. How do we follow up on usage?



This is Idus

At Idus we have developed and implemented maintenance systems for almost 30 years. We have helped many organizations within many different industries, this has shown us what works and what is applicable to make organizations even better.

We offer fantastic flexibility when it comes to offering solutions that fit everyone regardless if you are an organization of a few craftspeople at one site or hundreds of craftspeople on different sites.

Our philosophy has always been to make user-friendly systems for all types of industries and everyone within the organization. You can start with a very small system and open more functions when you will when it suits you.

Contact us today for a meeting and a personalized demo.

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Guidance



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IoT / Industry 4.0