

# 10 Steps to Choosing **THE BEST CMMS PROVIDER**



# CHOOSING A CMMS PROVIDER

## OVERVIEW

Knowing where to start when choosing the right computerized maintenance management software can be an overwhelming and difficult task to start. This guide will help walk you through 10 steps to preparing for, recognizing and selecting the best vendor for your company's maintenance needs. Choosing the right software can not only streamline a company's maintenance operations but it can also save tens of thousands of dollars in yearly maintenance costs. Now that's worth taking time to choose the right one!

IS IT TIME TO  
CHANGE  
YOUR CMMS?

WHAT ARE THE  
BENEFITS OF  
A CMMS?



1

CREATE A CMMS SELECTION  
AND PROJECT TEAM

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GOALS AND BUDGET

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## CREATE A CMMS SELECTION & PROJECT TEAM

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Gathering the correct project team is crucial to a successful vendor selection and implementation. Carefully choose key people to be part of the team. Make sure they understand their roles and responsibilities. Clearly layout the project plan and timeline for them. Some key department leaders to include are maintenance, finance, IT and inventory.

### IMPORTANT TASKS

- Select key people who are needed decision makers
- Select maintenance supervisors and managers
- Select specific IT staff who will implement software
- Select work order admins
- Define roles and timeline for Team

**KEY SYSTEM CONSIDERATIONS BEFORE IMPLEMENTING A CMMS**

# 2



**DECIDE COMPANY  
REQUIREMENTS, GOALS  
& BUDGET**

## DECIDE COMPANY REQUIREMENTS, GOALS & BUDGET

A CMMS is a powerful tool not just for maintenance but for efficiency and cost savings. To get the most of a CMMS, a company's goals and needs must be recognized. What is the purpose of implementing a CMMS for your company? Analyze the company's needs, requirements and goals. What areas need improvement? What compliance requirements must be met? Having a clear picture and plan will ensure success with a CMMS.

### WHAT CMMS COSTS SHOULD I PLAN FOR?

### IMPORTANT TASKS

- List compliance requirements for equipment
- Decide project and yearly budget for CMMS.
- List company expectations for CMMS
- List maintenance and budget goals desired from CMMS
- Note any needed IT equipment, mobile devices or updates



# 3

**CREATE A FULL SCOPE  
PROJECT PLAN FOR  
AREAS AFFECTED**

## CREATE A FULL SCOPE PROJECT PLAN FOR AREAS AFFECTED

As with any software implementation, a thorough study of areas the software will manage is required. Coordinate with managers from each area the software will effect. Decide the needs of that area with them. Discover ideal maintenance actions, requirements and weak areas needing attention. Know warranty requirements and regulations. Know the number of equipment and staff using the software. This information will help develop a better understanding of the software demands.

### IMPORTANT TASKS

- Make a complete list of all equipment going into CMMS.
- Add detailed equipment information to this list including install dates, warranty dates...
- List equipment PMs and schedule with detailed tasks.
- Plan project according to equipment priority and needs

# 4



## GATHER COMPANY MAINTENANCE INFORMATION

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Every company who conducts maintenance can gather beneficial information from past maintenance records. A great CMMS can upload historical maintenance data to aid in future PMs, informative reports and budget predictions. The CMMS vendor can gain valuable insight into a company's needs and build the correct system by reviewing past maintenance schedules, tasks, parts and labor needs.

**PREVENTIVE VS PREDICTIVE MAINTENANCE:  
TAKING YOUR FACILITY TO THE NEXT STEP**

### IMPORTANT TASKS

- List PMs for all equipment for past year
- List number of work orders processes for last year
- List number of people accessing the CMMS software
- List parts and usage for past year



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## RESEARCH AND BUILD CMMS VENDOR LIST

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Like buying a car, a company must know what they need in a software and in a vendor. Contact similar companies for their CMMS referral. Conduct an online search of CMMS vendors, their reviews and their abilities. Create a list of top 5 choices for a vendor. Add to the vendor list the required and desired CMMS features. Include future needs and wants for the company. Don't forget to check the vendor's customer service, support plan and usability.

### HOW TO CHOOSE THE RIGHT CMMS

## IMPORTANT TASKS

- Get quality referrals
- Conduct online review of ratings, credibility, years of service and like customers
- Check offered features against company needs, including future needs.
- Create top 5 CMMS provider list with detailed information

# CMMS COMPARISON QUADRANT



## Gartner Software Advice FrontRunners Quadrant for Maintenance & Facility Management software

*(click image for more detailed CMMS Vendor information)*

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## CREATE RFP DOCUMENT WITH NEEDS AND EXPECTATIONS

## CREATE RFP DOCUMENTS WITH NEEDS & EXPECTATIONS

Create a detailed Request for Proposal to be submitted to each vendor. This document allows the vendor to respond to your questions and submit more information regarding their software in the format needed. An RFP can also align the response to aid in a quicker selection process. Make sure to include the IT, network and platform needs in the RFP.

To expedite the RFP process, download this detailed RFP template which can be submitted to a vendor.

### IMPORTANT TASKS

- Create a document describing your company, size, locations and purpose
- Include detailed needs and expectations
- Describe project plan, selection process and timeline in RFP
- Request cost proposal in needed format

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**MEET AND DEMO WITH TOP  
THREE VENDORS SELECTED**

## MEET & DEMO WITH TOP THREE VENDORS SELECTED

Narrowing down the vendor options will aid in a quicker selection process. Once the top 3 vendors are chosen, schedule live demos of the software for the project team. Demos are critical to choosing the right fit for the company. A software may look great on paper but it must be approved visually in look, feel and usability. Provide each vendor with a demo schedule and requirements to gain the best insight into the software.

### IMPORTANT TASKS

- Select top three vendors from review
- Do a side-by-side comparison of top three vendors
- Schedule demo with each vendor
- Give vendor detailed demo requirements and schedule

### 7 QUESTIONS TO ASK WHEN CHOOSING A VENDOR



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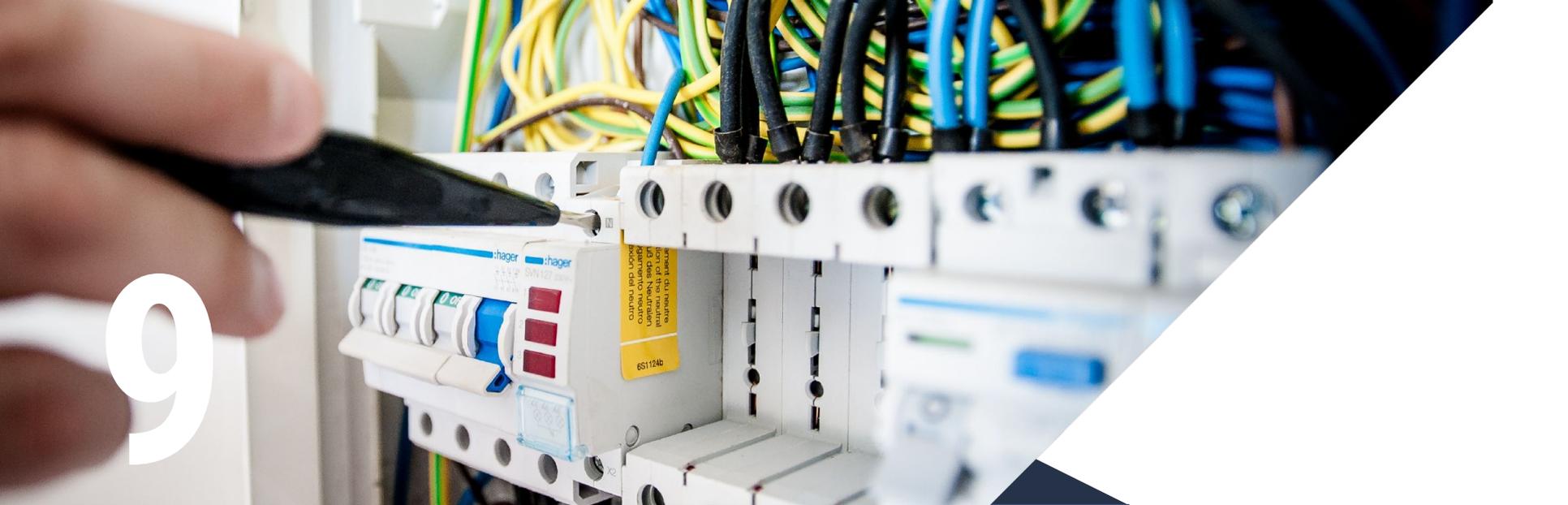
## REVIEW VENDOR CONTRACT AND REFERENCES

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Once demos are completed, narrow the CMMS vendor choice down to two vendors. Request contracts and references to help finalize the decision. Make a list of important questions and call each vendor reference. Once calls have been made, place a rating on the vendor per the conversations. Review contracts and documents. Have the company legal team review all contracts and report back to the project manager. Unfortunately, references and contracts can make or break a deal. So review them carefully.

### IMPORTANT TASKS

- Meet with project team to narrow down selection to two
- Request contracts and references list from vendors
- Make references calls, ask questions and write down notes
- Have legal team review contracts



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**DECIDE BEST FIT FOR  
COMPANY NEEDS AND  
BUDGET**

## DECIDE BEST FIT FOR COMPANY NEEDS & BUDGET

Once the vendor choice has been narrowed down to two CMMS companies, gather the project team to review all the facts and information. Lean on the team to add their expertise and opinions. What are the top three most important features needed? What are critical needs for the future? Which vendor has the best ratings, references and reviews? Where do they rate in the industry? Does the cost proposal fit inside the company budget?

### IMPORTANT TASKS

- Gather team for final discussion
- Review all the facts, features, reviews and references
- Review the cost vs. budget
- Decide vendor's ability for future growth and development
- Review vendor's industry rating
- Make the decision!



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**RANK AND FINALIZE CMMS  
VENDOR CHOICE**

## RANK AND FINALIZE CMMS VENDOR CHOICE

Now that the team has met, reviewed the information and costs. Select the best vendor who will serve your company well, understands your industry, has great ratings and is moving forward as an industry leader. Prepare the company for implementation and training. Put important dates on the company calendar and make sure resources are in place. Place CMMS goals in view as a resource to guide implementation by. Now the company is ready to move to excellence and efficiency with their new CMMS!

**KEY SYSTEM CONSIDERATIONS TO MAKE BEFORE IMPLEMENTING A CMMS**

### IMPORTANT TASKS

- Set implementation plan with top vendor
- Notify staff of implementation needs and schedule
- Implement any needed IT updates and/or equipment
- Put training schedule in place for staff
- Purchase needed laptop/mobile equipment for software.

## HELPFUL RESOURCES

### SOFTWARE ADVICE REVIEWS

A great list of reviews and helpful information on CMMS providers.

### CMMS CUSTOMER REVIEWS

Read detailed reviews of what other companies and customers are saying about CMMS providers and their experience with them.

### BETTER BUYS

A great comparison of CMMS vendors and their information.

### **DETAILED RFP TEMPLATE**

Download a detailed RFP to help compare and select the right vendor. This template provides detailed questions for each area of a company and then provides an interactive graph for comparison.



A properly implemented computerized maintenance management system (CMMS) is a powerful management tool. Many departments experience dramatic results from upgrading a CMMS; some departments experiencing 25-30 percent efficiency savings during the first year and continuous savings each year thereafter.

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