

EAM Best Practices

✔ Define What You're Looking to Achieve

Before choosing or implementing an EAM tool, it is important to first define your organization's needs. Without first defining your needs, it will be impossible to map a clear vision for what you're looking to achieve with your EAM system. Are you looking to reduce total cost of ownership (TCO)? Are you trying to more easily track maintenance KPIs? Determining the answers to these and other questions will provide a framework for implementing and selecting the appropriate EAM tool.

✔ Have a Solid Foundation for Your Data

Standardized and accurate data is one of the most critical components for the success of any EAM system. Standards drive strategy, and this principle applies to a company's data strategy as well. Uniform data provides accurate summary level information and reports to improve operational and strategic management capabilities at all phases of the asset lifecycle. Lack of standards can lead to situations where different shifts or workers input varying data, such as different naming conventions, varying specificity, or unpredictable failure codes.

The first step to have accurate and complete data is to identify any gaps or shortcomings. Often, the information available in the CMMS or EAM is dated. As a result, asset information can regularly be unreliable. Frequently, asset hierarchies have shifted, and because these systems are transactional and not easily appraised consistently, item data only becomes less accurate over time.

✔ Standardize Failure Codes

It is important when creating and using failure codes to standardize their use and tagging convention. Too few codes leads to inaccurate work orders and data that is nonspecific. An abundance of codes leads to confusion, resulting in operators using a catch-all like "other" or "miscellaneous". Preferably, the objective is to create enough codes to give accurate information without over-complicating the reporting process.

Similar to assets in a CMMS, codes need a standardized tagging convention. If different operators report the same failure as "leak", "leaking", and "leaks", filtering or running reports will produce inaccurate insights. Limiting failure codes to a predefined list or dropdown, in comparison to an open field, will prevent code variants.

✔ **Customize Your Workflow**

Workflows allow for a seamless flow between processes by automating procedures end-to-end. Scheduled processes can be completed by any time requirement – assisting organizations meet deadlines or goals. Every organization has its own needs, so be sure to customize your workflows to best match needs and situation.

✔ **Adopt Digital Transformation in Your Asset Management Cycle**

The point of any EAM or CMMS system is to offer increased efficiencies by digitizing previously manual processes. Asset or reliability managers cannot rely on paper records or big ledgers to help account for every part or piece of equipment. Embracing digital transformation not only allows for more efficiencies in collecting and recording asset data, the automation offered by customized workflows inside your EAM will lead to more standardized and accurate data.

✔ **Embrace Training**

Investing in training is crucial for a successful implementation of any EAM system. The more team members are trained to work in a system, the greater the chance the system will be used effectively. Rather than the EAM being viewed as extra work, training helps highlight the efficiencies of using such a system. For long-term success, it's important to embrace continuous training instead of a one-and-done approach. Technician trust in the system starts with detailed training. Without the trust of the technician you are wasting capital dollars on the EAM as they will just find work-arounds.

✔ **Review Regularly**

Before choosing an EAM or CMMS, a good early step is to review the current state of your assets. What processes are performing at subpar levels? When looking to choose a solution to these issues, aim for one that is scalable. These early decisions will help your EAM grow with your developing organizational needs.

It's also important to regularly review your EAM processes. Recurring reviews help to uncover any pressing issues that require immediate action. Perhaps an issue that was overlooked during implementation is leading to ongoing inefficiencies. Consistent monitoring leads to consistent EAM improvement.