

What are the steps to a successful EAM software upgrade?

- 1. Assess the current Enterprise Asset Management (EAM) implementation.**
It's typically less costly and time consuming to hire a qualified consultant. He can quickly assess the current system design and utilization and provide a go-forward plan. (Typical cost for this Readiness Assessment is less than \$3,000). Be ready to answer questions on system architecture (servers and other hardware), software version and number/type of licenses, current use (Work orders, purchasing, inventory, etc.), integration to other applications (Accounting, GIS, MS Project, etc.), database type and location(s), and database quality (work order backlog, asset hierarchy, etc.).
- 2. Develop a clear “vision statement” of the benefits to be gained by the upgrade.** Speed (faster PO issuance, work order processing, etc.), quality (fewer errors, lower risk of unexpected production down-time), communication (common group goals, standard nomenclature), productivity (labor efficiency, production uptime, availability), and knowledge retention (documentation of processes about to be lost due to employee retirement, etc.) are all valuable.
- 3. Get a management commitment to take action if you can produce a strong business case.** Consultants can help with this process by:
 - a. Building a business case based on the “vision statement” benefits.
 - b. Developing a doable timeline and budget.
 - c. Finding necessary technical and implementation resources from inside the organization and/or through consultants
- 4. Find a qualified implementation partner.** Outside help is cost-effective and almost always needed due to the specialized skills required for a smooth upgrade. Send a Request for Information (RFI) to potential implementation partners. First choice should be companies who are implementation partners with the EAM software company. Other key points:
 - a. Technical skills are more important than industry knowledge.
 - b. Ask potential partners about their work-process development skills and experience. Your goal should be to avoid automating dysfunctional processes.
 - c. Change-management skills are crucial.
 - d. Make sure the partner has user training and process documentation skills.
 - e. Ask about experience with similar projects.
 - f. Communicate with reference sites.
- 5. Develop a Request for Proposal (RFP) and send it to a small number of pre-qualified companies.**

6. **Qualify the companies on your “short list”.** Have your top two complete a two-day upgrade “Readiness Assessment”. This will give you a chance to test their technical and communication skills.
7. **Review RFP responses and award the work to the company with the best value proposition.** Lowest cost is rarely best; especially if the project scope is subject to change. Some companies bid low to win the project with the plan to charge more as the project continues.
8. **Gain specific management commitment for the resources necessary for a successful implementation.** If management won't to commit to enough resources for the COMPLETE IMPLEMENTATION, it may be necessary to stop discussions and document problems with your current system. This information can be useful when building a business case – later. Don't become involved in an under-funded implementation that is destined to fail and ruin your reputation and perhaps your career.
9. **Require accountability and adherence to implementation timeline milestones.** If schedule tracking is important to you it may be worthwhile to build your own schedule and progress activities on a regular basis. The scheduling tool is useful for day-one estimating but also important for week to week tracking of critical path. Another valuable technique is the setup of a work breakdown structure (WBS). This allows you to see actuals versus estimates by cost element.
10. **Confirm that all aspects of the implementation have been competed; including user training and documentation.** Performance benchmarks should be set up at the beginning to show where you are versus where you want to be when the project is complete. The goals for the project should be clear. Also, make sure everyone agrees to your definition of “done”.
11. **Conduct a project review and compile “lessons learned” for use in your next implementation/upgrade.** This can be very valuable information to yourself - and others.
12. **Maintain the implementation team structure for at least one year after the upgrade is complete.** Change is tough. This team is crucial to long-term success. There should be a Core Team for the upgrade but also a User Group once the system goes live. These groups should maintain an action list. This list may contain problems (and fixes), open and closed, prioritized activities, assignments – internal or external, approvals and cost estimates.