

facilio

CMMS Evaluation Guide

How To Choose The Right CMMS That Best Suits Your Evolving O&M Needs



Table Of Contents

EXECUTIVE SUMMARY

Are you evaluating your CMMS to drive the future of your building ops?

2

THE FUNDAMENTAL CHALLENGE

Leaders are evaluating CMMS with an asset and maintenance management mindset. That's not enough.

3

CMMS EVALUATION FRAMEWORK

A 360-degree view of all considerations that matter, so you can make the right decision.

6

CMMS EVALUATION WORKSHEET

A simple tool for making decisions and evaluating vendors.

12

FACILIO'S CONNECTED CMMS

Helping property operations connect people, processes, and systems

17



EXECUTIVE SUMMARY

Are you evaluating your CMMS to drive the future of your building ops?



A robust computerized maintenance management system (CMMS) is at the core of operations and management (O&M). Yet, today, most leaders make CMMS purchase decisions based on old standards of operating a building portfolio. This means they are looking for functionalities around maintenance, work order management and that's that.

But, building operations have changed dramatically over the last decade. As has the adoption of latest technologies including AI, IoT, digital controls, and no-touch mechanisms. For those who haven't been catching up with the evolution, the pandemic gave a harsh nudge. In addition to the myriad responsibilities involved in property operations—including managing critical assets, interacting with various contractors, and providing the best end-user experiences—today, there are also new health and safety regulations, monitoring, safety compliance, and so on to handle.

Today, CMMS evaluation should take into account these new challenges. Decision makers must consider the evolving needs of engaging different stakeholders, digitizing and automating processes, ensuring efficiency through visibility, and how well it can integrate with their existing enterprise tools. This can often be a complex decision to make.

Here's a framework that puts the power in the hands of CMMS buyers. We've designed this framework to help you choose the CMMS for your needs, not adapt your processes around the tool's capabilities. This framework guides you throughout your CMMS purchase journey—giving actionable pointers at each step of the way. You can use this to streamline your thought process, discuss with stakeholders, adapt for your unique and specific needs, and leverage it at sales calls.

THE FUNDAMENTAL CHALLENGE

Leaders are evaluating CMMS with an asset and maintenance management mindset. That's not enough.

While approaching CMMS evaluation from an asset and maintenance perspective, buyers settle for solutions that perform a series of basic tasks like creating work orders, service reminders etc. This brings its own set of challenges such as:

1. Existing products don't go beyond asset and maintenance

For decades, we have been evaluating, purchasing and using CMMS for operations and maintenance. Therefore, CMMS solution providers can be building products that enable maintenance, repair, and operations of physical assets and equipment. This is no longer enough, as the building operations landscape has changed.

2. They don't consider evolving needs

Technologies like AI, IoT, digital controls, and no-touch mechanisms have added layers of complexity to connected buildings. The pandemic has brought additional health and safety mechanisms into the picture. As the legal frameworks evolve, there are also concerns of monitoring, safety compliance, and so on to handle.

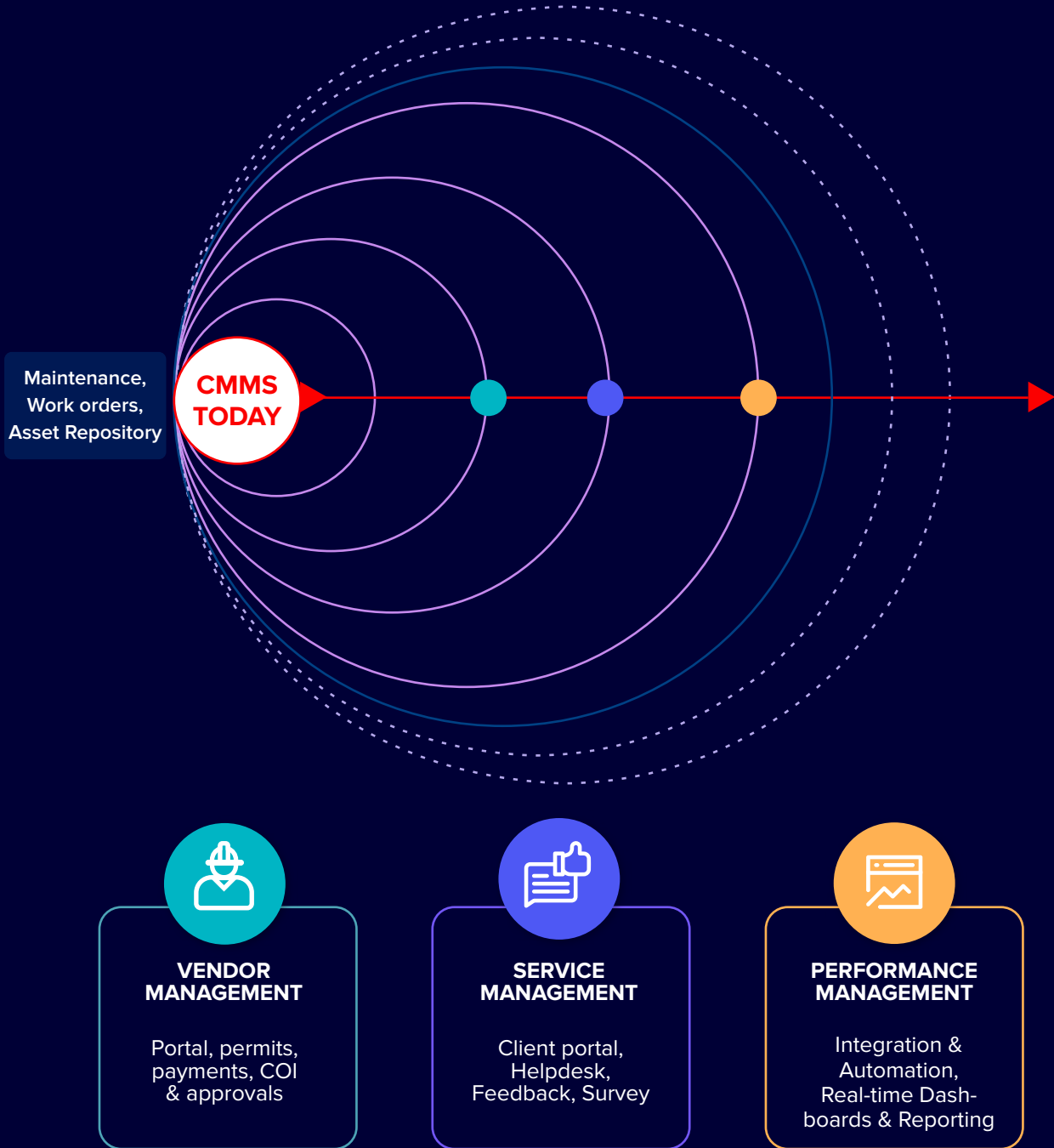
3. They don't engage the various stakeholders

All of these moving parts have expanded the number of stakeholders of each building. The current CMMS operational model is unable to offer a 360-degree view of the entire building operations landscape, engaging all stakeholders adequately. So, responsibilities other than asset and maintenance management are done outside of it. Each department / stakeholder / function rely on a separate software with loose ends tied up using email or spreadsheet-based workflows.

4. They don't integrate well with existing systems

Most present CMMS products are also unable to automate workflows or integrate with other enterprise O&M tools. This leaves buyers frustrated with the amount of time and efficiency lost in manually covering for the products incapacibilities.

CMMS is more than just asset and maintenance management



In the next Section, we discuss how you as a CMMS buyer can evaluate existing solutions to choose one that best fits your needs.

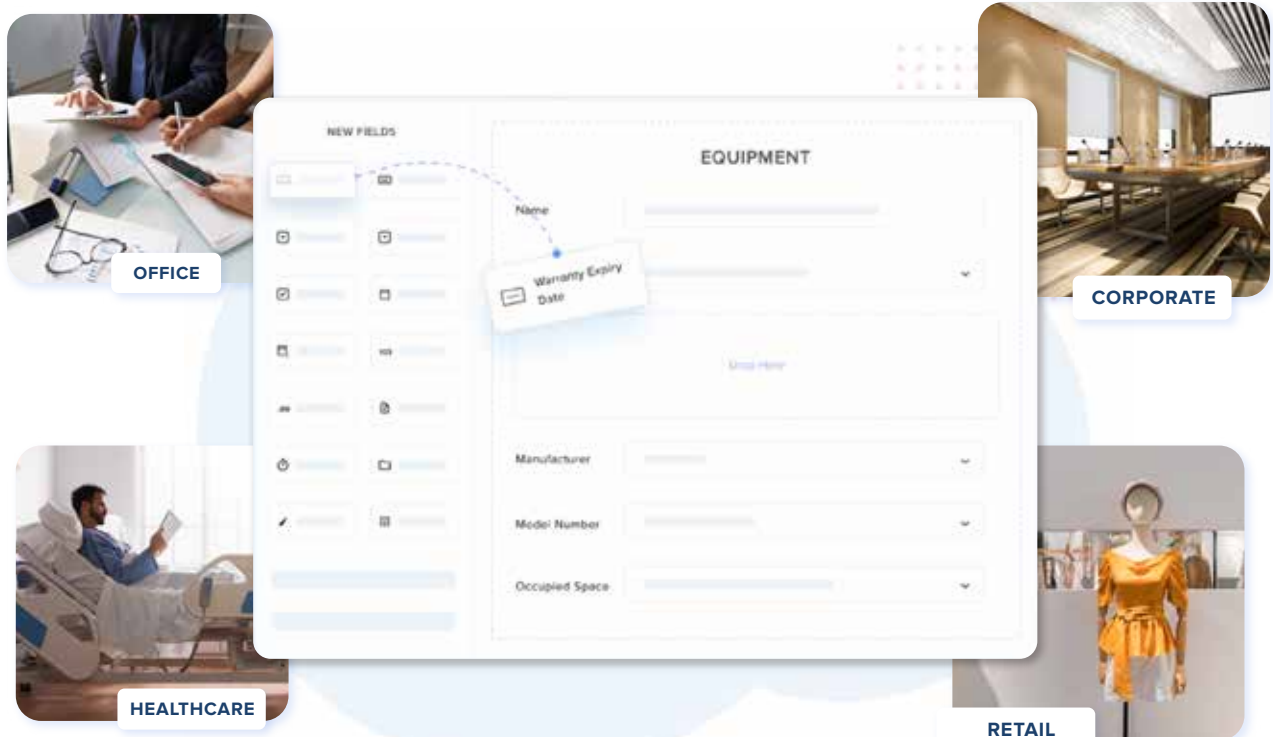
CMMS Evaluation Framework

Buying a CMMS can be a complex web of decisions covering a wide range of considerations such as product capabilities, functionalities you need, tech maturity of your stakeholders etc. This framework is designed to give you a 360-degree view of all considerations that matter, so you can make the right decision.

STEP 1

Industry-level considerations

Each industry has unique needs. Hospital operations can be dramatically different from retail, for instance. At the first level, a good CMMS needs to accommodate these needs, offering the flexibility and customizability to manage building ops your way. So, it's best to begin there.



HERE ARE A FEW QUESTIONS TO CONSIDER:

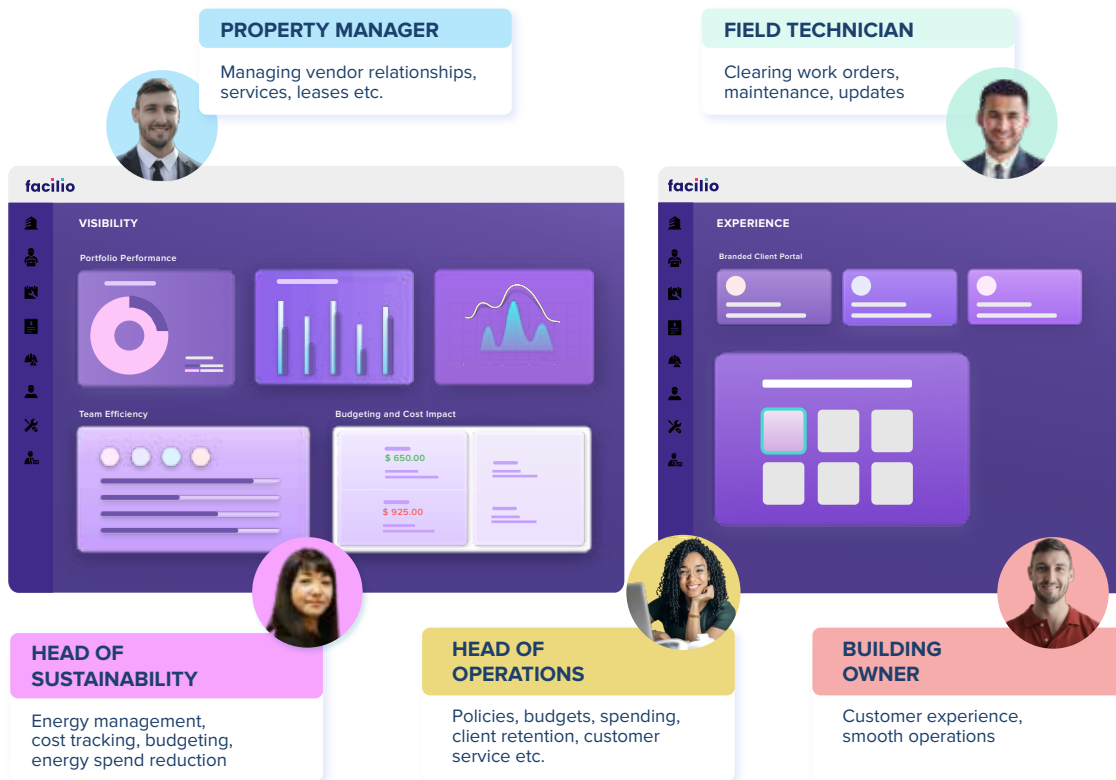
- **What is the industry you work in? (Retail, healthcare, etc.)**
- **What are the non-negotiable needs for the industry from a CMMS?**
(If you're a retailer, for example, you might need better set-point control for refrigeration)
- **What are some sector-wide issues?**
(For retail, for example, this might be aging retail infrastructure)

STEP 2

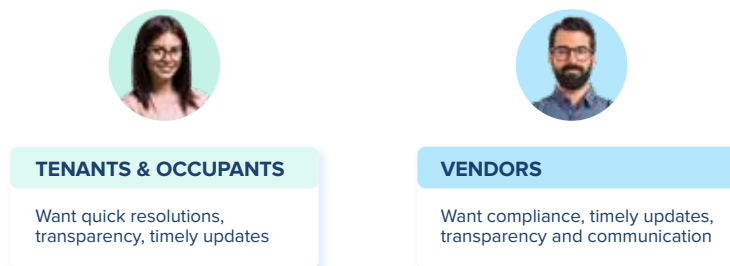
Stakeholder-level considerations

Whether it is retail or facilities management, there are multiple people who stand to gain value from CMMS data. While evaluating CMMS solutions, consider every stakeholder you would like to connect. Here is a landscape of internal and external in a typical building operations scenario.

O&M STAKEHOLDER | KEY RESPONSIBILITIES



EXTERNAL O&M STAKEHOLDERS | MAJOR OUTCOMES



Stakeholder needs

Now, for each of these stakeholders, make a list of pain points and needs. For example, the head of facilities management might be looking to maximise resource efficiency, while the tenant would want speedy resolution. While these feel like conflicting goals, they are both critical to the success of your building operations. So, they need to be balanced effectively.

To include this as a part of your CMMS evaluation process, make a list of goals/needs of each stakeholder. Make sure you first prioritize the stakeholders, and then within each, list the goals/needs in their order of importance.

Current solutions

While doing this, also consider the inefficiencies these stakeholders are currently facing and how they are currently tackling them.

HERE ARE A FEW QUESTIONS TO GUIDE YOU THROUGH THE PROCESS:

➤ **What is your current tech stack?**

Make a list of all the tools you're using in your property management, including the ones that you might think of as trivial.

➤ **What are your top three daily problems?**

Some commonly seen problems are old assets conking off, work orders not raised/closed/ responded to on time, poor tenant satisfaction, etc. If you have more than three problems, prioritize them.

➤ **How are you currently addressing these problems?**

Include all solutions, not just tech ones. If you're outsourcing it or using paper-and-pen etc., write them down too.

➤ **What are the gaps you're seeing in your current solution?**

Outline the business impact of these problems and solutions here.

STEP 3

Organizational considerations

Depending on the nature of your business, the size of your building ecosystem, the systems you have, and the processes you follow, your organisation will have unique needs. Make a list of them all.

SOME OF FACILIO'S CLIENTS TYPICALLY ANSWER THE FOLLOWING QUESTIONS:

- **Do you have a large escalation hierarchy?**
- **Are your technicians and labour the same?**
- **Do you connect with multiple vendors for services and material?**
- **Does your internal team not adapt well to technical overhauls?**

STEP 4

Measuring ROI

At the end of the day, any new investment needs to produce proportionate returns. So, an important step in evaluating any CMMS is to understand the ROI you expect. We recommend that you do this in two ways.

First, outline your business goals. Examples include energy optimization, increased productivity, reduced time on processing, etc. Next, identify product features that will help you meet these goals. For instance, a mobile app or workflow automation can improve productivity. A customized efficiency dashboard will help energy optimization. While doing this, categorize the feature wishlist as must-haves and good-to-haves.



STEP 5

Validating your understanding

From research and trials, you might have a vague understanding of what each platform might do. Shortlist potential platforms and schedule discovery calls with them — be careful not to have more than three on your list. The four steps above will act as preparation for the call. Use the information you've outlined above to guide your conversation. Remember to be open with information, ask probing questions and allow the platform sales teams to explain.

- ① **Be clear about your needs and processes so the CMMS sales team understands your situation**
- ② **Specifically ask “does this feature address this specific problem?”**
For instance, can workflow automation perform administrative tasks like raising work orders, SLAs, etc.
- ③ **Ask them to explain the limitations of each feature**

STEP 6

Making a choice

If you had a shortlist of three or less platforms, you will find it easy at this stage to make a decision. Use our evaluation worksheet to compare platforms. This will give you a unified view of all three platforms.

At this point, also consider the big picture over the long term. The above problem-solution approach might solve your current issues. However, as an investment, your CMMS should also power your future growth. So, go beyond the bare minimum. For instance, a retail chain's goal would be to increase foot traffic. A CMMS that can track the most frequented areas might offer insights for better visual merchandising.

CMMS Evaluation Worksheet

In this CMMS Evaluation Framework, we give you everything you need to consider before choosing a solution for your property operations. From strategic items needed for your industry/business to the granularities of everyday operations, we cover the entire gamut.

This worksheet has been designed to be printable to aid your CMMS purchase and help you make an informed decision using the above framework.

STEP 1

Industry-level considerations

① **What is the industry you work in?** *(Retail, healthcare, etc.)*

② **What are the non-negotiable needs for the industry from a CMMS?**
(If you're a retailer, you might need better set-point control for refrigeration)

③ **What are some sector-wide issues?**
(For retail, this might be aging retail infrastructure)

STEP 2

Stakeholder-level considerations

① **Who are your key stakeholders?**

② **What are the needs of each stakeholder? What are the solutions they're using currently for their needs?**

Stakeholder	Need	Current solutions

STEP 3

Organizational considerations

Depending on the nature of your business, the size of your building ecosystem, the systems you have, and the processes you follow, your organization will have unique needs. Make a list of them all.

① **Do you have a large escalation hierarchy?**

② **Do you connect with multiple vendors for services and material?**

③ **Does your internal team not adapt well to technical overhauls?**

④ **Other considerations**

STEP 4

Measuring ROI

At the end of the day, any new investment needs to produce proportionate returns. So, an important step in evaluating any CMMS is to understand the ROI you expect. We recommend that you first identify your goals and then pick the features you need to achieve them.

STEP 5

Evaluation checklist for discovery calls

From research and trials, you might have a vague understanding of what each platform might do. Shortlist potential platforms and schedule discovery calls with them. Use the table below to make observations.

Goal	Features needed	Platform 1	Platform 2	Platform 3
Technical productivity	Mobile app	Yes	Yes	No
Faster processing of work orders	Mobile app	No	No	Yes

STEP 6

Make a choice

Consider the big picture over the long-term. The above problem-solution approach might solve your current issues. However, as an investment, your CMMS should also power your future growth. Make a wishlist of things you need in the future.



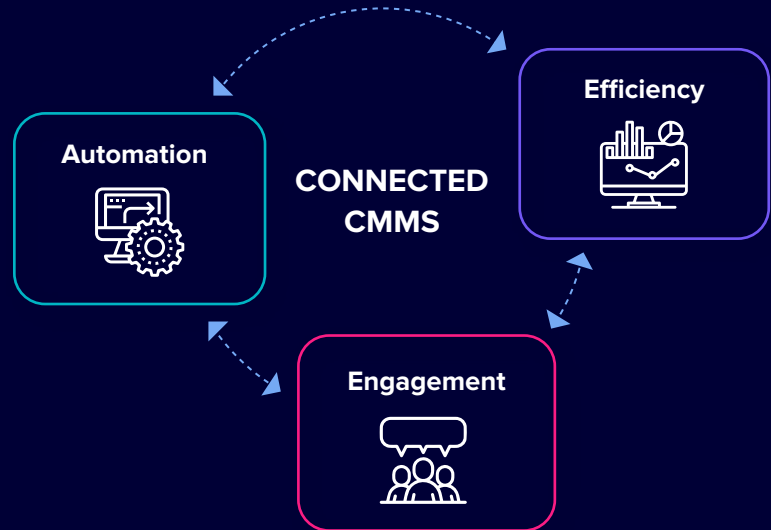
DECISION

Write down the name of the product you've chosen and why.

Facilio's Connected CMMS: Helping property operations connect people, processes, and systems

Connected CMMS is a reimagined approach to property operations and maintenance that meaningfully connects your systems, people, and processes. One that expands the boundaries of CMMS beyond work orders and maintenance to automate processes, enable stakeholder engagement, and drive connected efficiency—all in one place.

Connected CMMS is the best way to enable a single-pane-of-glass for property operations and maintenance.



Instead of forcing operations stakeholders to rely on multiple point solutions to manage jobs beyond maintenance, email for communication, spreadsheets for reporting, Connected CMMS consolidates all operational workflows—from property maintenance and client engagement to vendor and workplace management to asset performance, and IoT data—in a single comprehensive platform.

Connected CMMS improves efficiencies and changes the way customer experiences are delivered by connecting people, processes, and systems.

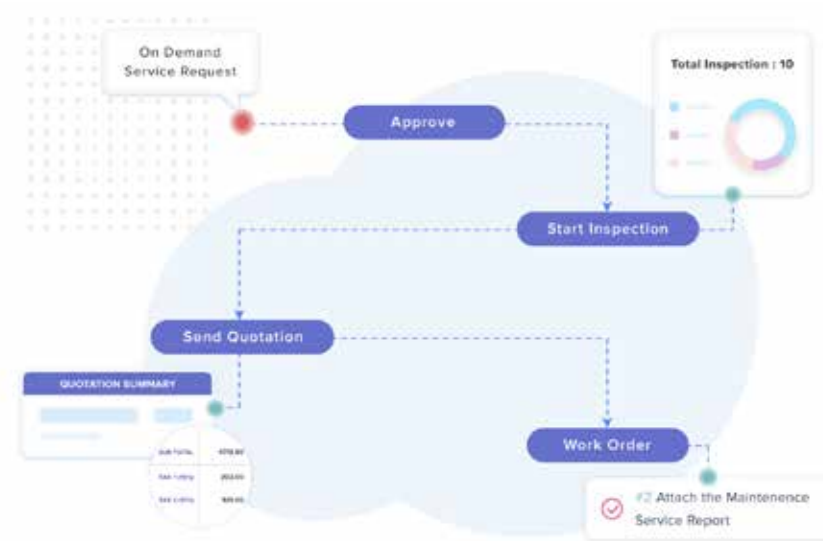
Connecting People

Connected CMMS is designed for multi-stakeholder engagement from the start, not as an after-thought. It offers user interfaces for all roles integral to the property operations unit such as field technicians, property managers, executive leadership, and management who can gain access to the information they need when they need it. Connected CMMS also meets external stakeholders such as occupants, employees (workplace), tenants/clients, vendors, and contractors right where they are.



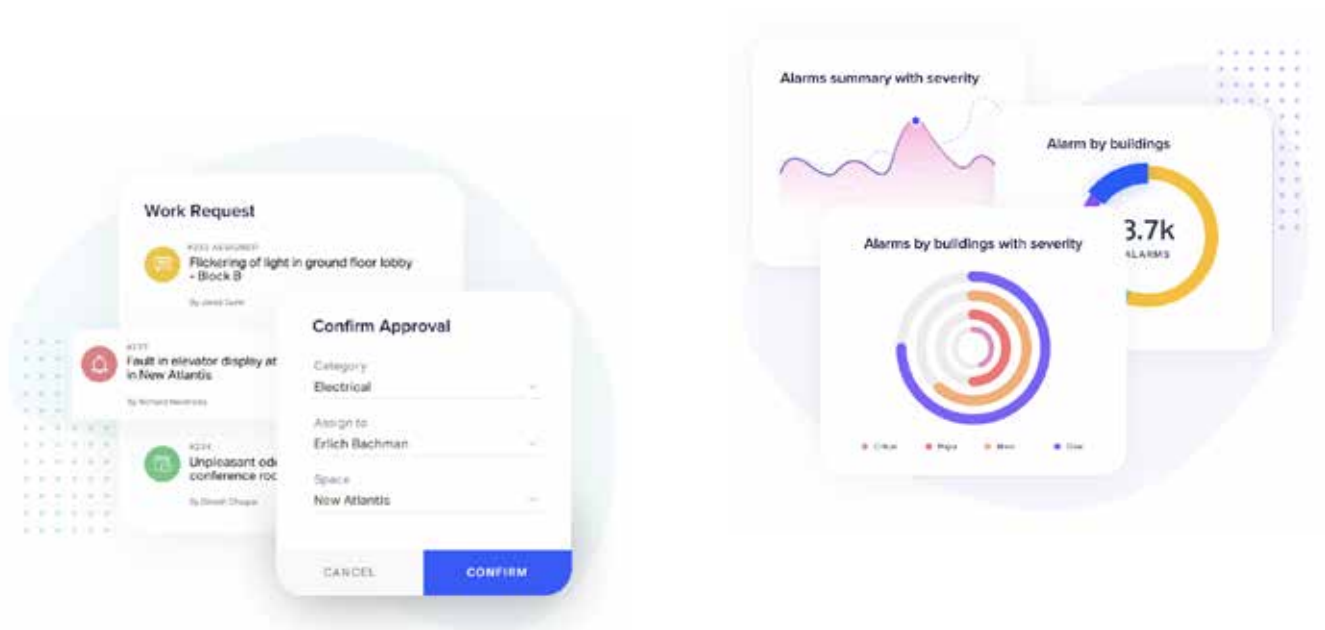
Connecting Processes

Connected CMMS brings together processes to holistically enable the many facets of property, real estate, and maintenance operations from a single place. Through digitization and automation, Connected CMMS redefines best practices and creates new paradigms that fit evolving building realities.



Connecting Systems

Buildings today have more needs around energy management, occupant health, efficiency optimization, predictive maintenance etc. Connecting to the building systems and gathering real-time data is key to optimizing processes around it. Connected CMMS integrates with 3rd party software and applications to maximise enterprise O&M value.



About Facilio

Facilio is a data-driven, vendor-agnostic property operations platform that connects to diverse building systems, IoT sensors, and business software applications. Facilio enables property owners and operators to optimize asset and building performance and control portfolio operations at scale, all from one place.

Powered by artificial intelligence (AI) and deep industry expertise, Facilio is ushering the real-estate industry towards a connected, automated built environment and is solving operational gaps for over 10K properties across 100+ million sq. ft spanning 12 countries.

To learn more about Facilio or get in touch for a demo, email us at getsmart@facilio.com.



Our Offices

Dubai | Newyork | London | Chennai