Your Roadmap to AM/CMMS Software

Step 1: Form Your Software Selection Team
- The most important people to engage are those already familiar with maintenance operations and facility managers.
- Include at least one person from each department that will be using the system, including billing and IT, to ensure that everyone's needs will be met.

Step 2: Understand Your AM/CMMS Needs
- The more you know about your utility and its needs, the better prepared you will be to pick the right software. Knowing exactly what you want will also save you money.
- Ask yourself what you want out of AM/CMMS software. Do you want to be able to track work orders? Are you looking to do preventative maintenance? Do you want to be able to access information in the field?

Step 3: Understand Your IT Needs
- Do you want your AM/CMMS software to be cloud-based or installed on-premise? Companies will usually offer one or the other but not both.
- A cloud-based system offers fewer upfront costs. Additionally, upgrades and troubleshooting can be done remotely, saving more money.
- An on-premise solution provides better security. Check with your IT department to determine if your utility has requirements that force the data to stay on site.

Step 4: Create Your Essential and Optional Features Lists
- Once you understand your utility's needs, create an essential features list and an optional features list.
- It's important to not exclusively focus on your current needs. You should also consider what your needs may be in 5-10 years. You do not want to outgrow your software.

Step 5: Establish Your Method of Procurement
- Option 1: Your utility may require an RFP or have a similar process.
  - If your utility is required to take bids or write an RFP, make sure to include all of the features on your essential and optional lists in the RFP. Also include whether or not the software must be cloud-based or installed on-premise.

o   Once bids come in, request demos of the top three candidates. You will not know if the software is right for your utility without demonstrations.
- Option 2: Your utility does **not** require the RFP or a similar process.
    o   If your utility is allowed to pick software begin researching companies using your two features lists as parameters.
    o   Once you have thoroughly research companies and found some that check every feature off your essential features list, create a short list of companies, 3-4, and set up a demo.

Step 6: Demo
- Companies will tailor the demo to reflect the items on your two lists.
- While the demo is going on think about functionality and ease of use. Does each feature seem user friendly?
- As each feature is shown, ask questions. For example, if preventative maintenance is on your list make sure the software supports preventative maintenance in the way you do it or would prefer to have it done.

Step 7: Price
- Each AM/CMMS software will have a different pricing scheme. Pricing may be available on a company's website but more often you will have to request a price estimate. Do this early on to see if it is within your budget.
- Prices can be based on one or all of the following: gallons per day, number of connections or number of users (concurrent or total). Have this information before asking for a price estimate.
- There are many hidden costs in AM/CMMS software. Below are questions you should ask the company to understand the full cost.
    o   Is it subscription or license based? Does the license or subscription fee stay the same or increase every year?
    o   How much are the onboarding and training fees?
    o   Is there a cost to importing and integrating data into the system?
    o   Is there an additional cost for technical support?
    o   Is there an additional cost for upgrades?

Step 8: Technical Support
- All companies should provide some type of technical support but the type may depend on whether your software is cloud-based or on-premise.
- The following questions will help you gage the level of technical support provided
    o   How does technical support work? Is there around the clock support?
    o   Do you provide instructional videos, in-software guides, live chat?
    o   How are upgrades done? Are we shown the changes?