

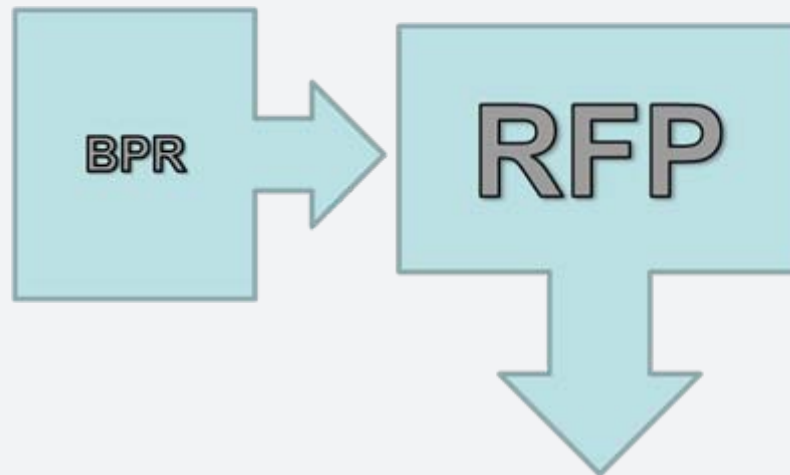


The Business Process Review

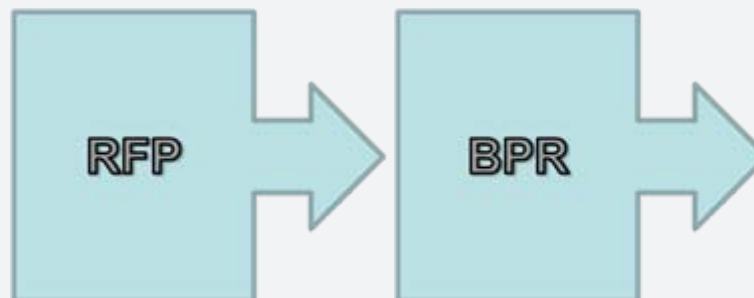
Dennis P Pennington
Senior Business Consultant
610 582 5900

The Business Process Review

The objective of a **Business Process Review (BPR)** is to evaluate the current business process for the purpose of identifying enhancements and opportunities for improvements and how (or if) MAXIMO advanced functionality can be configured to support the desired improvements.



BPR feeding RFP is Preferable to RFP seeking BPR



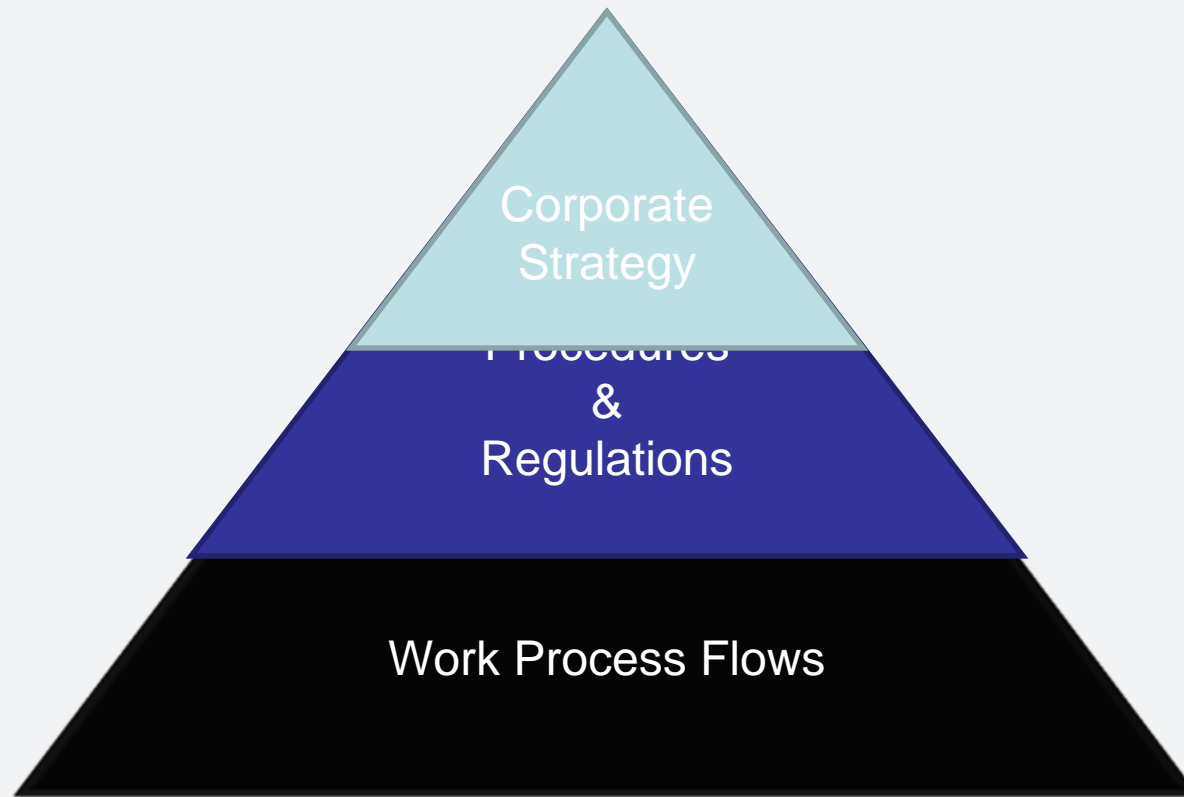
BPR Areas for Evaluation

- All major areas of maintenance and operations including inventory, procurement, Asset Management, and Work Management are reviewed during the BPR sessions.
- The BPR sessions evaluates current maintenance business processes and suggested how these processes should be modified to achieve maximum return and highest efficiency.

Functional BPR Areas of Interest

- Asset Management
- Work management
- Support management
- 3rd Party Software
- Current MAXIMO Configuration
- Regulatory Requirements
- End Users Requirements
- Measurements (KPI)

BPR Guidance



BPR Procedural Review

- Determine What is a Requirement
 - Evaluate Specified Requirements
 - Explicitly Defined (No Wiggle Room)
 - Recommended (Allows User Defined Options)
 - Nice to Have (Completely Optional) *Note: Regulators Many Times Will You to a Internal Defined Higher Standards.*
- Reference Procedure and Paragraph on Work Flow Requirements
- Avoid “Always Done it that Way” as a Reason for Maintaining or Refusal to Modify a Requirement

Asset Management Areas of Interest

Asset Management (Assets, Locations, etc.)

- Identifies and documents motivational factors (business, environmental, safety or regulatory) for tracking components, defines specific criteria that assets would meet to require tracking in MAXIMO.
- Define What is an Asset?
- Evaluate Current Program Level of Asset Tracking
- Evaluate Change Impact
- Define Naming Conventions

Work Management Areas of Interest

Work Management (Work Orders, Planning, etc)

- Assesses and documents current business process work flows, highlight opportunities for improvements based upon industry best practice and opportunity enhance utilization of software functionality.
- Target Roadblocks and Interferences
- Identify Who is Doing What and Handoff Points

Support Management Areas of Interest

Support Management (Companies, Inventory, Purchasing, Financial, etc).

- Evaluation of activities of services groups in support of the business process model, to determine level and effectiveness of interactivity between groups.
- Evaluate how System Communicate with Each Other
- Identify Duplicate Efforts
- Identify Manual Processes

3rd Party Software Area of Interest

- Identify and document the various data sources currently supporting the business process. Includes all software, spreadsheets, Access databases, notes and other hardcopy data.
- Evaluate all Sources for possible inclusion
- Identify Potential Software to Solve Specified Requirements

BPR Field Visit

- Experience End User Perspective
- Observe Obvious but not Documented or Reported
- Familiarization with Infrastructure
- Instill a Team Presence
- Allow for End User Feedback and Questions

Current MAXIMO Evaluation

- Determine level of utilization of MAXIMO core functionality,
- Establish the general knowledge level of end users capabilities, training levels
- Level of Customization,
- Tailoring
- Interfaces Established
- Change Documentation
- Security Levels

Regulatory Requirements

- Environmental
- Regulatory
- Federal Mandates
- State and Local Mandates

Ensure that all Mandates are Addressed and Solutions Addressed.

All Areas Analyzed to Allow for the Following

- Identifying Process Defects and Opportunities for Improvement,
- Identify Work Load Overloads,
- Work Omissions
- Uncover and Incorporate Best Practices
- Generate Business Requirements to be Configured within MAXIMO
- Identify Security Group Requirements and Application Configurations
- Identify Reports and Interface Requirements
- Develop overall Business Requirements.

Business Process Review

Deliverable

- The **Business Process** document will be generated highlighting all results, comparisons of the “current state” to the desired state, Visio business work flows and MAXIMO configuration recommendations.
- The **Gap Analysis** document representing degree of effort for client to reach desired state.
- A **Project Plan** (Microsoft Project) reflecting activities and time lines to satisfy BPR objectives.

BPR Participants

- Project Manager – Motivator and Driver from Client side, authority vested and supported by upper management
- Senior Business Consultant – Primary facilitator; experienced in business process theory; background with industry experience; knowledgeable in MAXIMO functionality and application
- Documentation Specialist
- SME Teams – Representative from Subject departments.

BPR Process

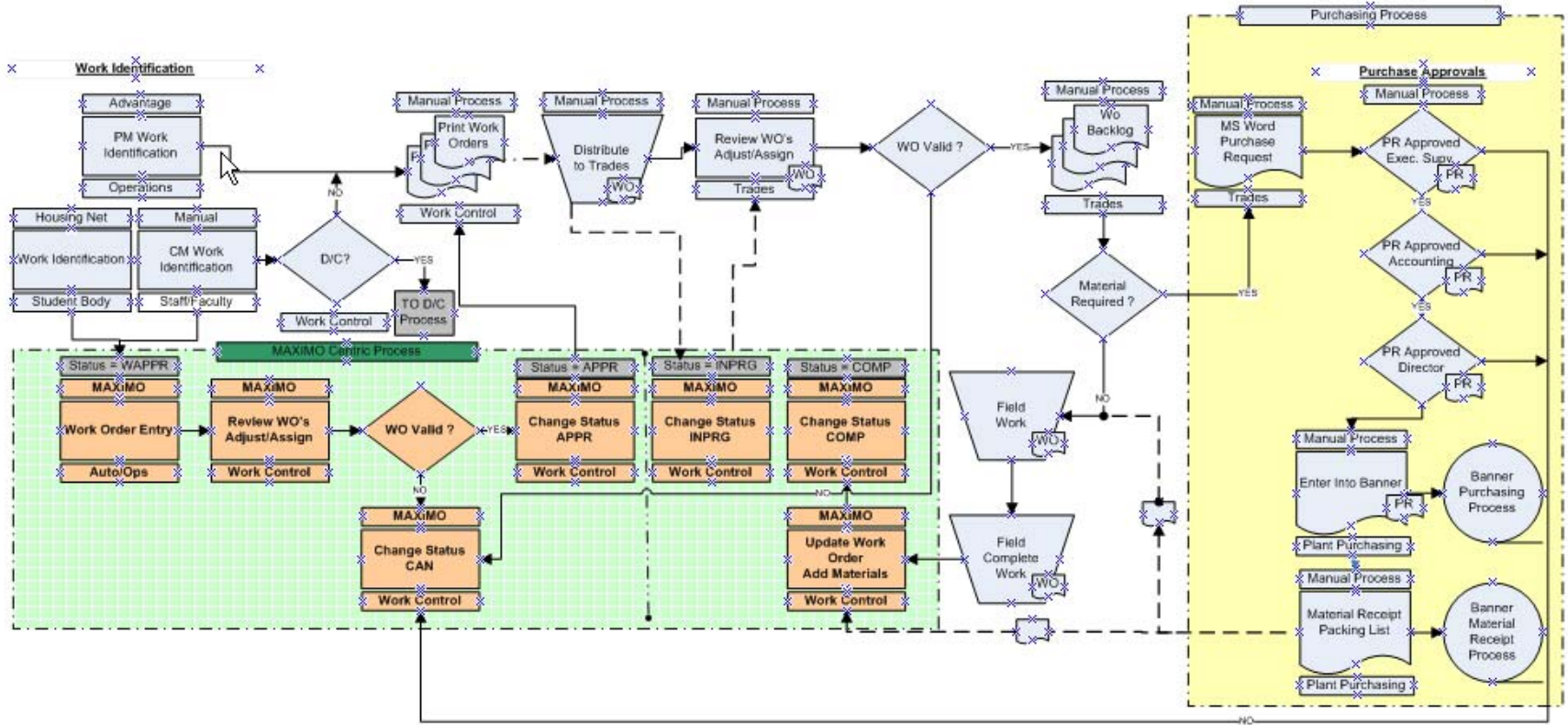
- The BPR process hosts a number of theme related workshops attended by internal Subject Matter Experts (SME's) and facilitated by a "Senior Business Consultant" and a document specialist for the purpose of recording results. Workshops field visits are usually performed to evaluate the process in real time and evaluate environmental conditions or restrictive conditions of the work sites/offices.
- Prior to the workshops it is usually advisable to host a MAXIMO familiarization training session to ensure all participants are aware of product functionality and product limitations. It has been found that holding this session is beneficial in expediting the rest of the process by having everyone "speaking the same language" as far as MAXIMO is concerned.

Workflow Analysis

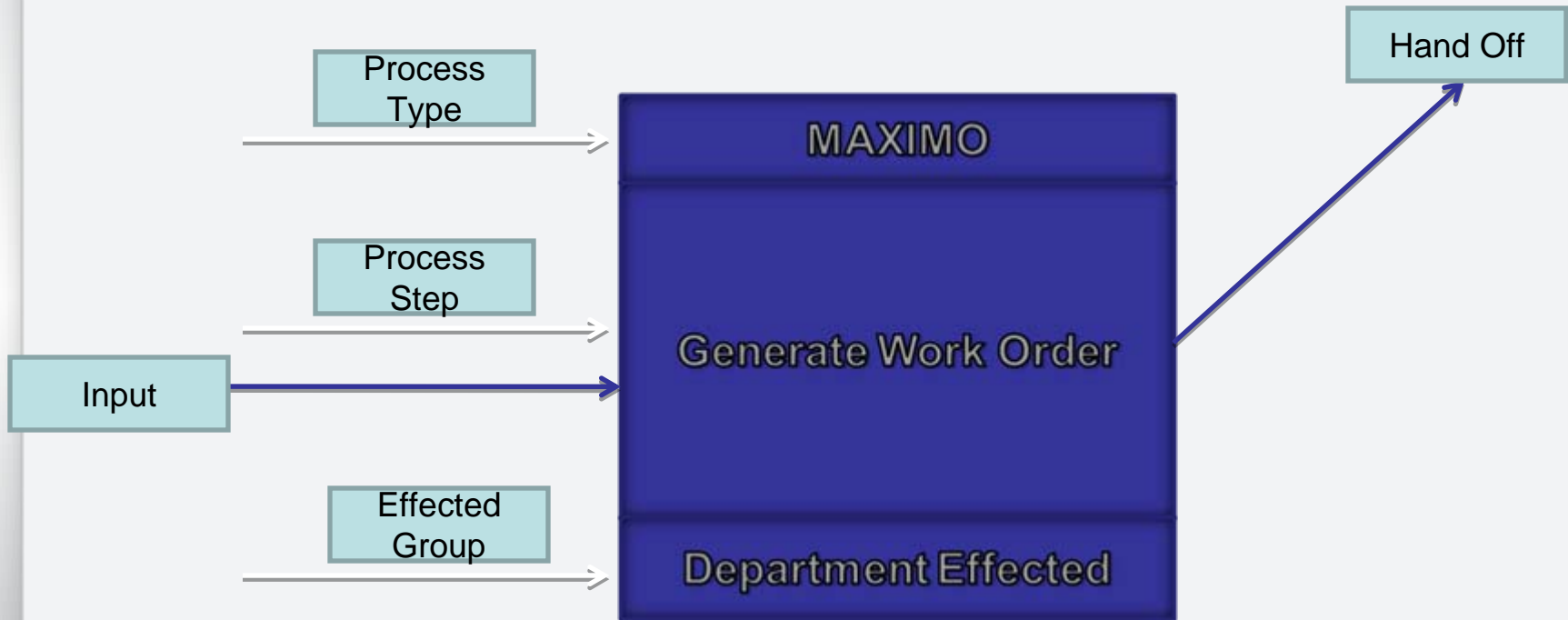
A visual representation of the work process for each flow type from work process initiation to completion and its interaction with people, departments and Software.

- Identifies Handoffs points
- Assigns Responsibilities
- Highlights Potential Overload Points
- Allows Initiator to track requests entered in MAXIMO through the process.

Work Flow Documentation – as found/as left



Process Step Information



BPR End Use

The output of this process will serve as the primary input for the development of the scoping section in the Request for Proposal or Project Plan.

The BPR will serve as a vision document for budgeting and planning.

Implementation Decision

Upgrade or Re-Implement?

Asset Management vs. Work Management?

Upgrade – via Scripts

Upgrade Benefits

- Easy/Cheaper
- Most Decisions already done

Upgrade Limitations

- Old data with new wrapper, if legacy system data is considered compromised it will migrate the same way
- Old data not configured to support old functionality it will not support new functionality.

Re-implementation

Re-Implementation Benefits

- Opportunity to correct, abandon suspect data,
- Enhance Functionality Availability

Re-Implementation Liabilities

- Added Cost
- Required More Participation and Effort

Work Management Approach

- Work Managements Primary Interest is in Tracking and Scheduling Work Orders. Costs are Accumulated against a work order but not necessarily against an asset.

Asset Management Approach

- Asset Management is comprehensive business strategy employing people, information and technology to maintain, upgrade and operate physical assets effectively.
- Asset Management focuses on achieving the lowest life cycle cost for assets in the production of a product.

Asset Management Theory

- **Management Process Designed to Optimize Facility's Asset Performance as defined by *Business Objectives***
- **Analyzes Asset contribution to meeting *Business Objectives***
- **Analyzes Asset performance at levels consistent with value (risk based)**
- **Applies resources to assets in support of optimal performance for meeting business objectives**

Engineering, Purchasing, Inventory, Operations, Maintenance, Internal man-power, contracted activity

Why Asset Management

- **Only way to fully meet high level of operational performance objectives at the lowest cost**
- **Enables management to validate O&M and engineering decisions**
- **Enables Risk Management for consistent performance**
- **Provides complete objective data for process improvement**

Business
Master
Plan



Business Master Plan

- Serves as a Roadmap for Current and Future Development.
- Allows for Planning and Budgeting of Future Items
- Allows for Insertion of Placeholders into Configuration to Easy Future Efforts

Sample Long Range Plan

