Good afternoon. My name is Miranda Anderson, and I am a Business Analyst for the Calgary Catholic School District. Over the last twenty years I have worked for many different industries – pulp and paper, fruit processing, cement milling, drug rehab, funeral providers, and government – in many different capacities, so it’s maybe not surprising that I approach my work from several different angles.

Now that I work for the Catholic School district, there are parables everywhere. (We don’t have leadership awards, we have Shepherd Awards.) Today I’m going to talk about our quest for better data through personally training people at all our sites.

After I trained my first few users on Maximo, I was pretty excited about it, and Superintendent of Support Services Mark Rawlek reminded me that “when you teach a man to fish, he’ll never go hungry” – hence the name of my presentation today.

When I go to Maximo conferences, the majority of users are generally from the Oil and Gas area. Therefore, I go to all the presentations and must treat them all like they are parables. That is, how can I use this story to learn something about my own application? Maybe some of the things I’m about to tell you about will be far behind you, and maybe some of it’s not even that much about Maximo, but I’m hoping that you all will be able to glean something to think about in your own industry.
This is just a little bit about our environment:

We have 105 schools and administration sites representing over 6 million square feet of facilities, with 51,000 little monsters I mean children and 3,300 instructional staff. The bulk of the Service requests are generated by the 1,700 support staff and 323 caretakers. In the 2013-2014 school year, the two Facilities Service Assistants handled almost all of the 15,000 SRs in one fashion or another.

To manage the internal labour and external contractors needed to service all this, Al Berting convinced Calgary Catholic to implement Maximo about 10 years ago.

Fast forward to a little over a year ago, just before the last Calgary MUG meeting, and they upgraded to Maximo 7.5.04 and to Al Berting 2.0 – that would be me.
Here are some of the questions that I had upon my arrival at Calgary Catholic:

- **How does everybody know what to do?** – I am a documentation maniac, so this is always the first question I ask anywhere. Is any of this stuff written down? Is it current?
- **How do I know what Maximo is doing?** – It’s no secret to anyone working with a large complicated piece of software that it can be difficult to know all the stuff that is being done in the background.
- **What are you hoping that Maximo will do for you?** – This is a complicated question in a public organization because you are trying to manufacture something, so you can’t measure performance the same way private companies do.
- **Have you thought about re-implementing?** – I asked this because I was told that they were not really using Maximo for PMs, and that they didn’t really have an asset list.

Here are some of the answers that they had for me...

- We tell them what to do.
- It’s okay – Al knows.
- What’s your vision for Maximo?
- Maybe this is not the right career for you, after all.
First things first... I set out to document all the processes that I could find: The approach is totally modular so that you can find exactly what process it is that you are trying to do, such as “Using Maximo to Create a Service Request”, and it is listed under that title.
Next up, document the documentation. This helped me keep track of the processes that had and hadn’t yet been documented, and which staff positions would need to know how to do each. So this view shows the processes that an FSA would be expected to be able to execute. You can also filter for the process, and see how many positions need to be able to do each one.
In October 2013, I facilitated part of the second meeting in a series called the Caretaker Reimagining. This was a meeting of Union managers, caretakers, Caretaking Supervisors, Maintenance managers, Distribution managers, Facilities Service Assistants, facilitated by an ex-principal and sponsored by the Superintendent. It was there that we learned that the most common beef that school caretakers had with Maintenance was that SRs would be marked Resolved when the work had not yet been done. Now, I don’t know how you would feel about this, but I was pretty horrified: How could we be telling people we had done stuff that wasn’t done?

To find out what was going on, we went back to the office and created a survey instrument using Survey Gold that would ask for feedback on every resolved SR so that we could find – and plug – the holes in our processes.

The survey asked four simple questions: Did the tradesperson sign in, how do you rate the responsiveness and communication, and what was the quality of the work done.
Now I’m going to take a little detour for a minute to talk a little bit about what happened when I started to go out to the schools to train them to use Maximo.

Before we gave schools access to Maximo:
Using Outlook to enter SRs meant that several people could submit the same Service Request, and then they would follow up with questions, which would create other SRs, and so we ended up with a lot of duplicate orders that needed to be resolved.
All they had to show them what was happening with the work was a constant barrage of e-mails. This came with its own set of issues:

- All the e-mails looked similar, so it was difficult for them to find the status of particular work.
- E-mails became easy to ignore.
- Many people don’t really know how to use Outlook that well, so they live with whatever view is the default deployment. When I went out to visit the first few Caretakers, I discovered that they had very small monitors. I asked one caretaker why he had not responded to our survey, and he did not know what I meant. Because the link to the survey was at the bottom of the e-mail, he did not see it in his “preview” pane. When he clicked on the e-mail, the preview pane showed him the e-mail, and it never occurred to him that he had not actually “opened” it.

This has implications far beyond the use of Maximo. We would never have known this if we had tried to train people online or in another facility.
The data that we were collecting by having users submit their Service Requests by e-mail left a lot to be desired. In this excerpt from the Service Desk view, you can see that the room numbers are in the Summary, there is no scheduling information, and most of the work locations are the same as the asset site. The Facilities Service Assistant was tasked with getting information from the e-mail put into all the right data locations. We were getting no data, bad data, or data redundancies. There was not really anybody in charge of policing the data.

Even when the sites were providing us with badly-needed information, such as the fact that a portable classroom had just been moved on-site, nobody was using this to move assets in Maximo. So until just recently, we had about 600 portable classrooms just ROAMING the prairie like bison. This made it kind of difficult to do things like annual PMs on the furnace. What are you gonna do: Just hand a WO to a tech and say “go find it”?
So, now back to our regularly-scheduled program, already in progress...

Despite the challenges that we were having on the data side, the feedback that we got from our survey in terms of clients being satisfied with the work being done was pretty good, and after we had been getting the surveys for awhile we improved on it considerably. What got more interesting as time went by was studying the intersection of information coming from those who were not satisfied.
Communications, for example, was really key to improving people’s perceptions of our work. The intersection of those who were satisfied with the work and satisfied with the communications represented 83% of responses.

When we looked at answers only from those who were unsatisfied with the work, most of them were also unsatisfied with the communications. The majority of these had also answered “No” to whether the contractor had signed in at the school when they came to do the work. So educating our contractors to sign in at the site had a positive result on our satisfaction numbers. (It’s possible that telling contractors that they were now being rated by the clients also had an effect.)

We started to get comments that contractors went above and beyond the call of duty, that they had instructed the schools in how not to break the same equipment the same way again. So the survey not only helped us improve satisfaction on the client side, it also helped us decrease repeated Service requests for the same problem.

Over the course of three presentations of this data, those measuring the quality of communications as excellent or satisfactory had increased by 6 percent. And those measuring the responsiveness as excellent or satisfactory had increased by 16%.
Speaking of reducing calls for the same problem, we were also able to identify through the survey the types of call that was most likely to result in rancorous feedback. A big one for us is snow and ice. So we created a sort of Service Level Agreement to send to all the sites that explained what they could expect from which group of workers and within what time frame.

Again, this has nothing to do with Maximo, but it does affect the number of service calls that go into the system. When I went out to train people at schools, we talked about the amount of pressure that is put on the system by repeated service requests for the same thing. In person, it is much easier to conduct what I like to call “sensitivity training”: The client can put in a Service Request and then I can show them what work is done on the other side of the fence to get the work done. I will have them enter a “live” Service Request for Maximo training, and then I will be the Service Desk, and then a Supervisor, so that they can see that when a Supervisor logs in for the day they are looking at 2000 requests. This helps the clients understand how they can help by not stressing the system with additional requests for the same thing.
Before we gave the Self-Service request back to the schools, we redesigned the screen so that it was stripped of anything that they did not have to enter. We moved the description of the problem to the “last” area of the screen so that users would get the idea that “filling in the boxes” was the most important part.

One of the biggest challenges for those who can type quickly is to accept that they do not need to be “polite”, for lack of a better word. Putting in their SRs by e-mail has instilled in them the habit of garnishing their service requests with chatty small talk, pleases and thankyous, and a lot of “if you don’t mind when you get time it would be great if you coulds”. This population is generally in the main office of the school, where it is extremely busy, and I tried to appeal to their sense of time management, but it was more of a hurdle than I expected because they all want so much to be perceived as “nice”.

The idea was more appealing for the majority of people who are not fast typists. So picking from lists is preferable for that population and in general they were pretty happy not to have to spend the additional time trying to be polite.
Going out to train people to use a system when your data is not that great can pose a bit of a challenge (as well as being a bit embarrassing). In this example, I tried to find SRs that were coded to boilers. How to explain to someone why they cannot find any Service Requests for their boilers for the past 10 years, when they know there are some?

Actually, this represented an opportunity to explain how important it was to get the right information from them. It represented an opportunity to explain WHY they should use Maximo instead of Outlook. “In the future, when we have all that great information from YOU, it will be possible to search for SRs using the Asset number.” Right now, it is almost impossible to answer a question like, “How many SRs did we have last year to go and paint out graffiti?” We have to rely on the summary line, which may or may not include the word graffiti, which may or may not be spelled correctly.

It is at this stage that the light goes on for a lot of people. They realize that it would be nice to be able to search easily for the work that is being done, and this is an idea that is easier for them to understand than some of the others. This is because it is closely connected to some of the other issues that bug them. One is that room numbers on their classrooms don’t always match the room numbers on the drawings that they have for the school. Realizing that getting correct data into the system is something that serves them means that they are now invested in helping you get the correct data. So now I get e-mails from schools telling me that the room they want to pick is not available in the location list, and this tells me that the drawing (or the door!) needs updating. In this way the data is getting better FROM THE GROUND UP, rather than being driven by a thirst for knowledge by management.
While I was preparing this amazing presentation about how I had single-handedly changed the world with my training and documentation, I had a conversation with a school that went something like this:

Me: I notice that your SRs are still coming in by e-mail. Is there something that I can do to help? Have you lost your shortcut/password/mind?

School: Do you have any idea what my desk looks like right now? It’s way too hard to use this system – we’ve decided to just continue using e-mail.

I had hoped that I had made it quite clear that two people handling 17,000 SRs coming in by e-mail was not an efficient way to do business, but apparently this did not always have the desired effect. I was pretty devastated, and almost decided to withdraw my presentation – “It’s all a lie!”

But then I went out to another school and trained two caretakers who were sooo enthusiastic and kept saying “This is going to be so much easier!” and it restored my confidence considerably. As I left the school they were going to write down the Serial Numbers on their portables and they had e-mailed them to me before I was back to the shop.
So what have we (that means I, really) learned from this adventure so far?

First is that somebody has to exercise their authority over process. Training people to use software isn’t going to have any effect unless there is some organizational imperative for them to use it. Strictly speaking, everyone that I have trained could say, “Nope – not doing it”.

I want to stress, though, that even if everybody DID do that, the time I have taken to visit all the schools myself has not, in my opinion at least, been a waste of time. I consider myself to have been an ambassador between the staff at support services and the staff at the school, and I am sure that Mark told me the fish parable because he thought it was just as important.

Second – don’t wait until the system is perfect to start training users. A lot of what we learned about how to train them, came from training them. Everybody’s a teacher, and everybody’s a student. Telling them that – that they are crucial to the system getting better, helps get them personally invested in its success.
If you take just one message from my presentation today, I really hope that it is the importance of training at the user site, especially if, as in our environment, each site considers itself its own special snowflake.

It reduces the perception that you are stealing time from them, because they can train in the office and still be available to respond to an emergency. This is especially important if you work in “caring services” like a hospital or a school.

It also reduces fear of the unknown. For those of us who live and breathe on a computer every day, it is not a big deal to have to do work on a foreign keyboard, but that does not apply to everyone. Also, it helps to be able to see the technological and physical issues they are dealing with on their side, like Outlook deployed with all panes open on a tiny computer.

Finally, it allows for small group discussion regarding site specifics. It might just be a wiggly shelf in the library, but for that school it might have been the centre of their universe for what seems like forever. It enhances credibility to be able to go away with at least one small irritation that can be easily solved. One caretaker who eyed me with suspicion and fear when I arrived at the school actually hugged me when I left.
And, since I know I’m supposed to have a closing slide but couldn’t think of anything clever to put on it, I will leave you with a bit of Zieg Ziglar Facebook Wisdom.

Thanks so much for listening. I will be posting my slides with all the other amazing presentations on the CanMUG site, and I welcome you to contact me if you would like more information on any of the items I’ve touched on here today.