

Design the future of Asset Lifecycle Management



With you today



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Agenda

- 1 Delivering you a better experience
- 2 Big Ideas activity
- 3 Roundtable discussion
- 4 Day 1 playback
- 5 Continue the conversation: User Engagement Program

Daily challenges we hear

1

We want to decrease
downtime / improve
maintenance

2

We need to derive new
value from data

3

We're losing the most
experienced
technicians

4

We want to decrease
rework and warranty
cost

What you need Maximo to do

Make it easy

→

"I don't want to spend a lot training my users."

"Our younger users have higher expectations around usability."

Help me do my job – better, faster

"It should be intuitive, informative, and help me do my job."

"Provide meaningful data and insights... without the noise"

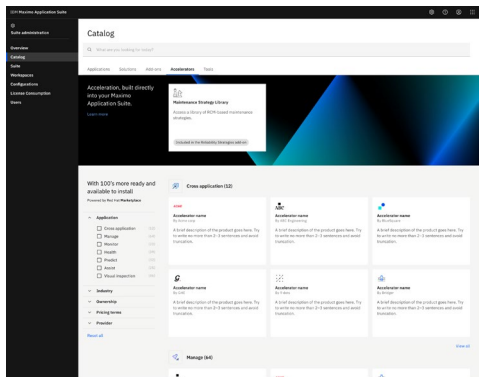
Give me the data I need wherever I am

"I want access to information in the office, on the plant floor, or at home."

"I should be able to input data without a network connection"

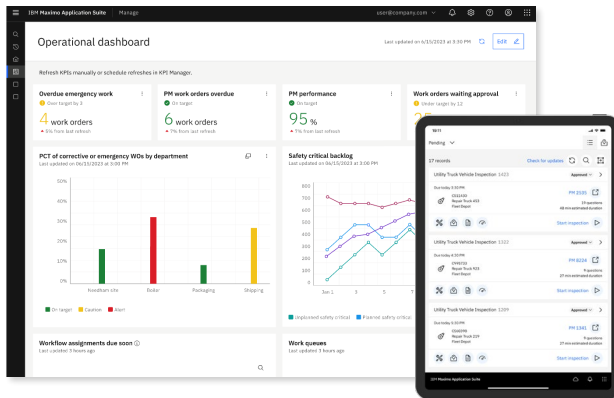
We've been innovating to bring greater value to your business

Administration



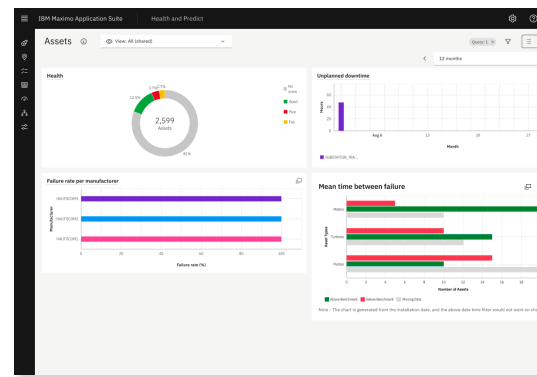
Licensing and deployment flexibility
Licensing usage monitoring
Maximo Application Framework app
designer
Accelerator Catalog

Inspections & Maintenance



Powerful, customizable dashboards (operational
views, scheduling, dispatching)
Streamlined work order views
Simpler, easy to use mobile experience
AI assistance for better decision making
Visual inspections

Reliability



Asset performance (Health scoring, asset
investment planning and optimization)
Reliability Strategy app & library for better
job plus with RCM
Ingestion of operational data and anomaly
detection

How can Maximo further help you and your teams succeed?

The journey starts with an understanding of our customers and their needs

Let's have a fun conversation about possibilities

Interactive big ideas
activity for creative
ideation and problem
solving.

Everyone grab a sharpie
and a sticky pad!

Stand up and get writing.



Design Thinking prompts

Imagine there was a single view that contained all of the information you or your users' needed to make confident, data-driven decisions.

What would be on that view?

Imagine that you could, with a magic wand, improve a process or task for you or your users - make it more impactful or shorten the time it takes to do it.

What would that task or process be?

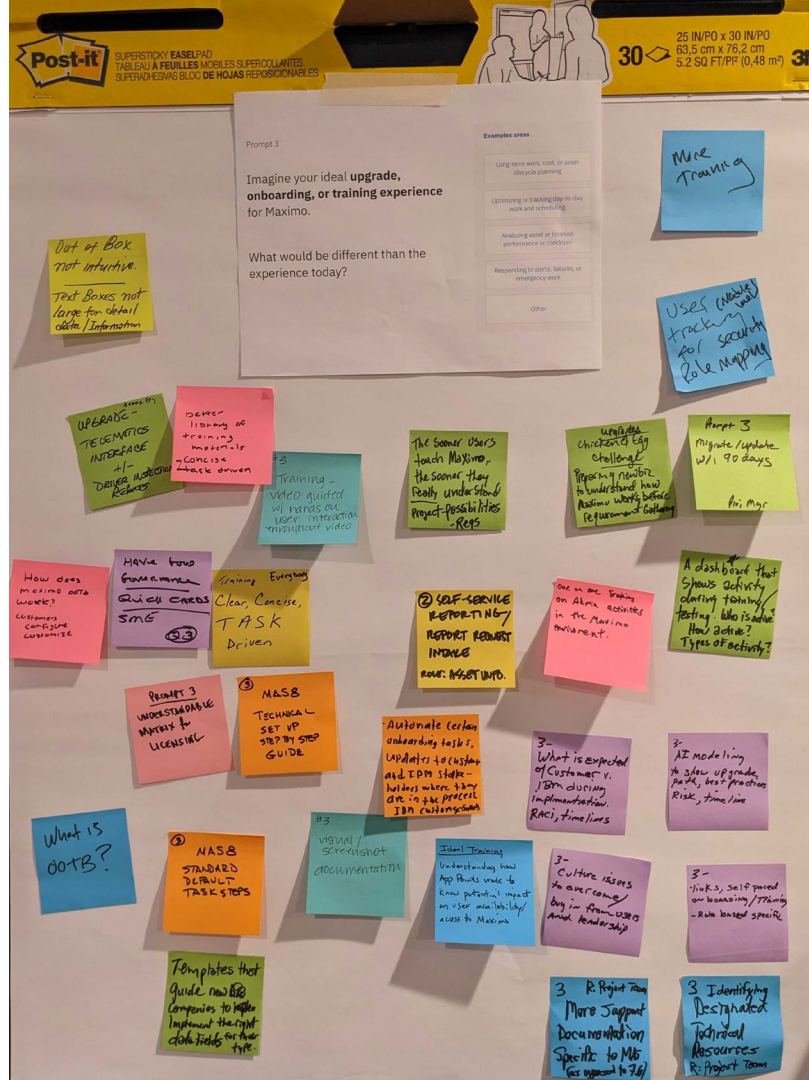
Imagine your ideal upgrade, onboarding, or training experience for Maximo.

What would be different than the experience today?

Prompt

Imagine your ideal upgrade, onboarding, or training experience for Maximo.

What would be different than the experience today?



Prompt Themes

New tool: Specific training UI

How it works OOTB

AppPoints/licensing

Training activity tracking

Direct support

Documentation

Pre-training

Supporting data quality

Follow-up questions

What does your training look like?

- Key tasks
- Documentation, videos, or something else
- Embedded in the UI or separate

New tool: Specific training UI

make training environment another color so users don't do training exercise in production
TECH TRAINER

AI modeling to show upgrade path, best practices, risk and timeline

links, self paced onboarding/ training
• role based specific

Topic: How it works OOTB

How does Maximo work OOTB?
customers configure and customize

What is OOTB?

Out of box not intuitive, Text boxes not large for detail data / information

Topic: AppPoints/licensing

Ideal training - understanding how Appoints work to know the potential impact on user availability / access to Maximo

Understandable matrix for licensing

Goals

migrate / update within 90 days
Role: project mgr

More training

MAS 8 standard default tasks steps

Self-serve reporting report request intake Role: asset info

Topic: Supporting data quality

Templates that guide new companies to implement the right data field for their type

Upgrade telematics interface +/- driver inspection reports

Training - clear, concise and task driven

The sooner user touch Maximo, the sooner they really understand project possibilities and requirements

Training activity tracking

A dashboard that shows activity during training / testing. Who is active? Types of activity (Bob's idea about project tracking)

Track logins for modules (audit history).
Con Ed

User tracking at module level for easier security role mapping

Automate certain onboarding tasks. O updates to customer and IBM stakeholders where they are in the process
IBM, customers/sellers

IBM engagement

Identifying designated technical resources Role: project team

Culture issues to overcome / buy -in from users and leadership

What is expected of customers vs IBM during implementation - RACI, timelines

1:1 training on admin activities in the Maximo env

Documentation

Better library for training materials that is concise and task driven

MAS 8 Technical setup step by step guide

More support documentation specific to MAS (as opposed to 7.6). Role: Project team

Training video guided with hands on user interaction throughout video

Visual / screenshot documentation

• better documentation
• clearer descriptions of who does what
• compare your journey to others in a similar industry
IBM CUSTOMER SUCCESS

Have good governance quick cards SME

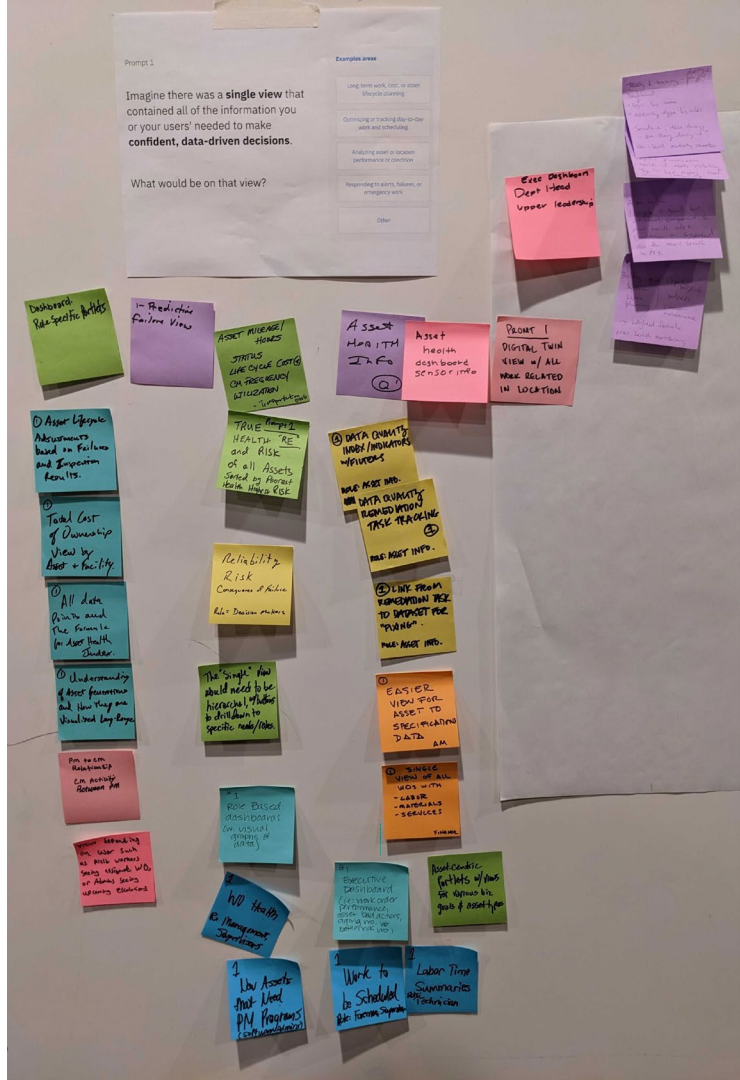
MAS 8 standard default tasks steps

Pretraining

Chicken & egg challenge
Preparing new biz to understand how Maximo works before requirements gathering

Imagine there was a single view that contained all of the information you or your users' needed to make confident, data-driven decisions.

What would be on that view?



Prompt Themes

Role-based dashboards
(executive dashboard)

Data governance and quality

Work order data

Asset data
(total cost of ownership view)

Asset health data

Follow-up questions

If we provided OOTB templates for dashboards, what would be the most important templates?

- Industry-related
- Role-related
- Metrics-related (themed by results, eg finding bad actors, predicting failures)

Role-based dashboards

The single view would need to be hierarchical with buttons to drill down to specific needs/roles

Role based dashboards (w. visual graphs of data)

Dashboard
Role
Specific
Portlets

Executive Dashboard (ie: work order performance, asset bad actors, aging wo, bottleneck wo)

View depending on user such as field workers seeing assigned WOs or Admins seeing upcoming escalations

A dashboard that shows activity during training / testing. Who is active? Types of activity (Bob's idea about project tracking)

Topic: Data governance and quality

All data points and the formula for asset health index

Data quality index/ indicators with filters (R: asset info)

Data quality remediation task tracking (r: asset info)

Link from remediation task to dataset for "fixing" (r: asset info)

Visual design

The single view would need to be **hierarchical** with buttons to drill down to specific needs/roles

Topic: Work order related data

Digital Twin view with all work related in location

WO Health (role: management, supervisors)

Single view of all WOs with Labor, materials, services (role: finance)

PM to CM relationship
CM activity between PM

Labor Time Summaries (role: technician)

Work to be scheduled (role: foreman, supervisor)

Topic: Asset health

Asset Health Dashboard Sensor info

Asset Health Info (R: Q)

Guidance on suggested use for Asset health index guidance

Predictive failure view

True HEALTH and risk of all assets sorted by poorest Health Highest Risk

Asset lifecycle adjustments based on failures and inspection results

Topic: Asset related data

Asset-centric portlets with view for various biz goals & asset types

Total Cost of Ownership view by asset + facility

Easier view for asset to specifications data (AM)

Understanding of Asset Generations and How they are visualized long-range

Exec Dashboard Dept Head for Upper Leadership for capital prioritization, health of asset visibility, see top 10 bad actors, etc.)

Asset mileage / hours
Status lifecycle cost(s) CM frequency utilization (Transport Eng)

New Assets that need PM programs (software/ admins)

Imagine that you could, with a magic wand, improve a process or task for you or your users - make it more impactful or shorten the time it takes to do it.

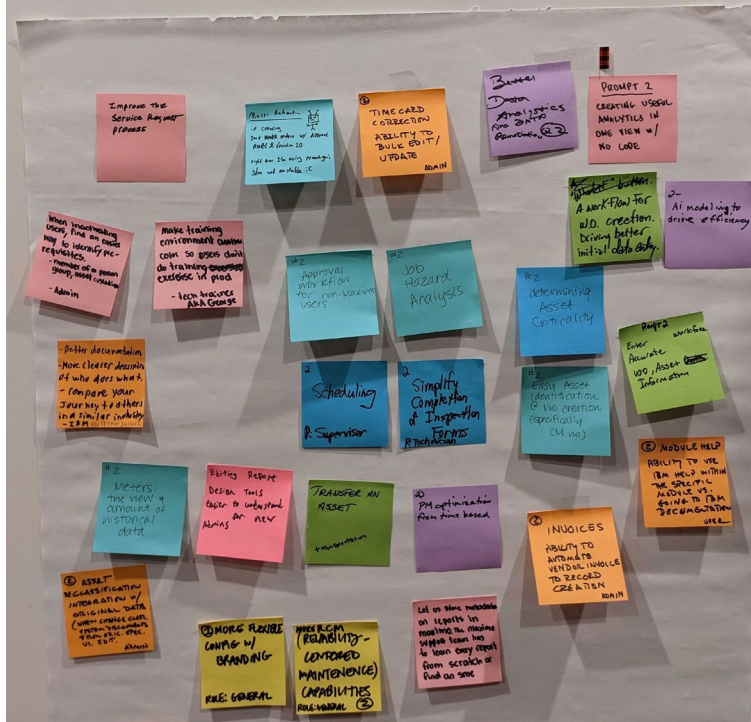
What would that task or process be?

Prompt 2

Imagine that you could, with a magic wand, **improve a process or task for you or your users** - make it more impactful or shorten the time it takes to do it.

What would that task or process be?

Examples are:
Long work week, work, or event (flexible planning)
Optimizing or tracking day-to-day work and scheduling
Analyzing event or location performance/capacity
Responding to alerts, failures, or emergency work
Other:



Prompt Themes

General analysis

General usability

Investigating assets
(asset criticality)

Entering and managing data

Mix of specific tasks
(approval flow, service requests,
scheduling)

Follow-up questions

Where is our biggest opportunity to help you improve data quality?

For example, automating data entry, automating the identification of problems, automating reviews, or generating reports.

General analysis

Better data
analytics
and data
remediation

creating useful
analytics in
one view with
no code

job hazard
analysis

ai
modeling
to drive
efficiency

General usability

module help:
ability to use IBM
help within the
specific module vs.
going to IBM doc
USER

more flexible
config /
branding
GENERAL

Task: Entering/Managing data

enter accurate
work order,
asset
information
WORKFORCE

a workflow for
work order
creation driving
better initial
data entry

simplify
completion of
inspection
forms
TECHNICIAN

Time card
correction
ability to bulk
edit/update
ADMIN

invoices: ability to
automate vendor
invoice to record
creation
ADMIN

Task: Investigating assets

PM
optimization
from time
based

determining
asset
criticality

easy asset
identification @
no creation
(specifically
CM noo)

reliability risk
consequences
of failure
DECISION
MAKERS

meters the
view and
amount of
historical data

more reliability
centered
maintenance
capabilities
GENERAL

Other tasks

Improve
the service
request
process

approval
workflow for
non-maximo
users

when initiating users
find an easier way to
identify prerequisites
• member of a
person group, asset
custodian
ADMIN

editing report,
design tools
easier to
understand for
new admins

Macro Automation
i.e creating sorted work
orders with different
asset and location ID
right now using python
slow and unstable

scheduling
SUPERVISOR

Asset classification
integration with
original data (when
change class, system
disconnects from
original, spec vs. edit)
ADMIN

Transfer an asset
TRANSPORTATION

Do you wish your experience could be used to **make solutions fit** more naturally to the realities of your **business** and their **processes**?

The **User Engagement Program** incorporates client feedback through early **concept** previews & **design ideation** sessions.



Places Users and Non-Users at the center of all design & development efforts.

Enables feedback to be incorporated into all Product phases (Initial concept to delivery).

One-way confidentiality supports early previews of concepts across IBM.



Embraces continuous delivery methods (make changes, get feedback).

Provides opportunity to engage across the IBM portfolio.

Shapes informed solutions to fit the marketplace (not customized).

User Engagement Program

Project pipeline

- Do you have any thoughts to share on any of these concepts?
- Are any of interest to you or your organization?
- Do they address familiar challenges for you or your org?
- Would you be interested in participating as a subject matter expert, and co-creating potential solutions alongside IBM? (at your cadence, availability & convenience)

Concepts:

- 1 Asset management & work execution generative AI use cases
- 2 Operational Dashboards - visualizations, KPIs, and actionable insights
- 3 Field Service Management
- 4 Emissions tracking and management
- 5 Climate risk and resiliency
- 6 Speed to value - faster administration and user onboarding

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