


Achieving operational excellence with the Circle of Collaboration



A full-page background image of an industrial setting. In the foreground, a man with a beard, wearing a yellow hard hat and a blue and orange plaid shirt, is seen from the side, giving a thumbs-up gesture. In the background, another worker in a blue uniform and yellow hard hat is visible, working on a piece of machinery. The scene is brightly lit, suggesting an indoor industrial facility.

How industrial organizations
can enhance asset management,
reduce downtime, and promote
a safer workplace.

Effective collaboration is essential for optimal performance in industrial facilities, yet operations, maintenance, and health and safety departments often work in silos. This whitepaper explores how the Circle of Collaboration, powered by IFS Ultimo's Enterprise Asset Management (EAM) platform, can address these challenges by fostering a unified environment that enhances communication, reduces downtime, and promotes safety.

Empower effective collaboration

Safe and productive industrial facilities are the sum of many parts.

Multiple teams from across an organization must perform well together to ensure that systems and equipment work optimally to meet all business objectives.

However, ensuring effective collaboration and communication is not easy. Despite the interconnected nature of their tasks, operations, maintenance, and health and safety departments often take a siloed approach to many of their day-to-day activities, failing to work together to achieve mutual results.

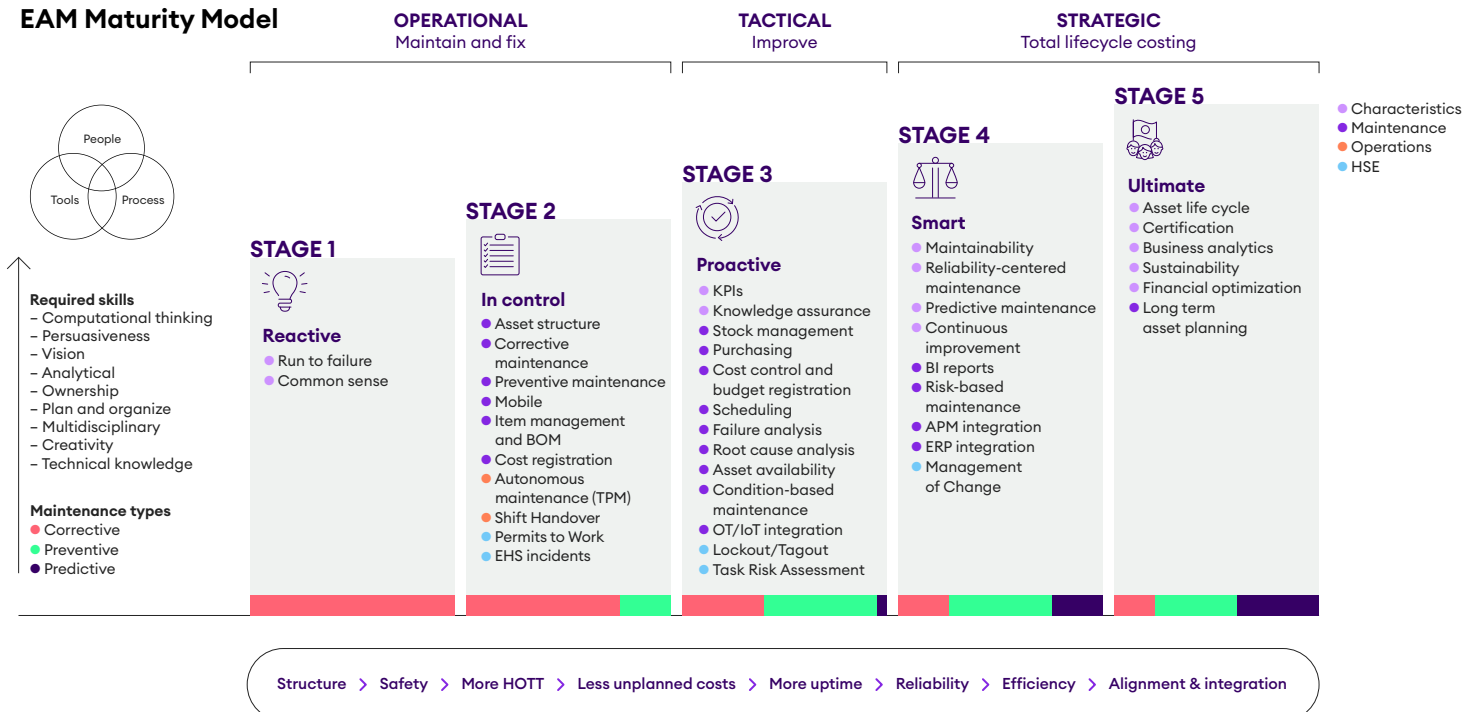
This shortcoming can be attributed to a myriad of factors - organizational, cultural, technological, or personal. Each team might have different objectives and priorities: operations focus on efficiency, productivity, and meeting production targets, while maintenance is more concerned with ensuring equipment uptime, availability and reliability. Meanwhile, health and safety specialists are driven by the need to provide a safe working environment, yet they are sometimes not attuned to how their actions can slow down operations. Cultural differences and hierarchical barriers further complicate interdepartmental and cross-functional collaboration. And, in large industrial complexes, physical separation can hinder effective communication.

These barriers create an environment where cooperation and collaboration struggle to thrive.

This lack of collaboration is a significant concern for industrial organizations. If production line workers in the operations department adopt a 'we use, you fix' mindset towards their maintenance colleagues, this could lead to adversarial relationships based on finger-pointing and blame rather than mutual trust and respect. Such an attitude could result in the creation of inadequate failure reports, leading to unplanned downtime. Indeed, research from the 2023 IFS EAM Trend Report shows that ensuring uptime is the single most important KPI for asset managers in industrial sectors. Tellingly, one of the biggest risks to uptime is poor communication between different teams.

Poor communication not only risks uptime but also hinders the growth potential embedded in the IFS Ultimo EAM Maturity Model. The model discusses promising technology such as the Internet of Things (IoT) and its potential for better asset visibility. But before attempting to deploy this technology, maturity and cooperation between operations and maintenance need to be established first.

EAM Maturity Model



Without effective communication, all organizations will struggle to move from the beginning stages of reactive and corrective maintenance to higher stages of readiness relying on condition- and risk-based methodologies. Attaining the highest and most strategic level on the Maturity Model is only possible with clear and open lines of communication between all involved departments.

So, the scene is set. Industrial organizations need to find ways to empower more effective collaboration between operations, maintenance, and health and safety teams. Only through joint interest, better coordination, and more effective planning can asset management be optimized and downtime reduced.

Introducing the Circle of Collaboration

In an ideal world, industrial organizations could start to improve cooperation in several ways. These include:

Setting Unified Goals: Aligning inter-departmental objectives to ensure everyone works towards the same goals.

Facilitating Structured Communication: Establishing regular cross-departmental meetings and communication channels.

Improving Failure Reports: Ensuring detailed and accurate reporting to prevent misunderstandings and finger-pointing.

Leveraging Planned Downtime: Coordinating maintenance activities during planned downtimes to minimize disruption.

But what is the best way to go about achieving these ambitions? What systems and software need to be in place to ensure that operations, maintenance, and Health, Safety & Environment (HSE) colleagues can all move in the same direction?

The remedy here is digitizing all relevant data, processes, and know-how in order to create a single source of truth. IFS Ultimo's best-of-breed EAM system offers this possibility, and many more. It is specifically designed to collect, share, and analyze information in a central place for all organizational stakeholders so that the best possible results can be found, and informed decisions can be made based on it. This gives companies a comprehensive overview of their equipment and assets, enabling them to reduce downtime and optimize the efficiency of their maintenance strategy. Extensive tools for cost control also ensure the cost-effectiveness of the measures.



Modern, cloud-based EAM software such as IFS Ultimo makes the data accessible to anyone within the organization with a PC, tablet or smartphone. Using the mobile version of IFS Ultimo, all relevant historical maintenance data is directly accessible at the machine. Similarly, an operator can carry out maintenance while receiving support and guidance from an expert remotely accessing the machine's data.

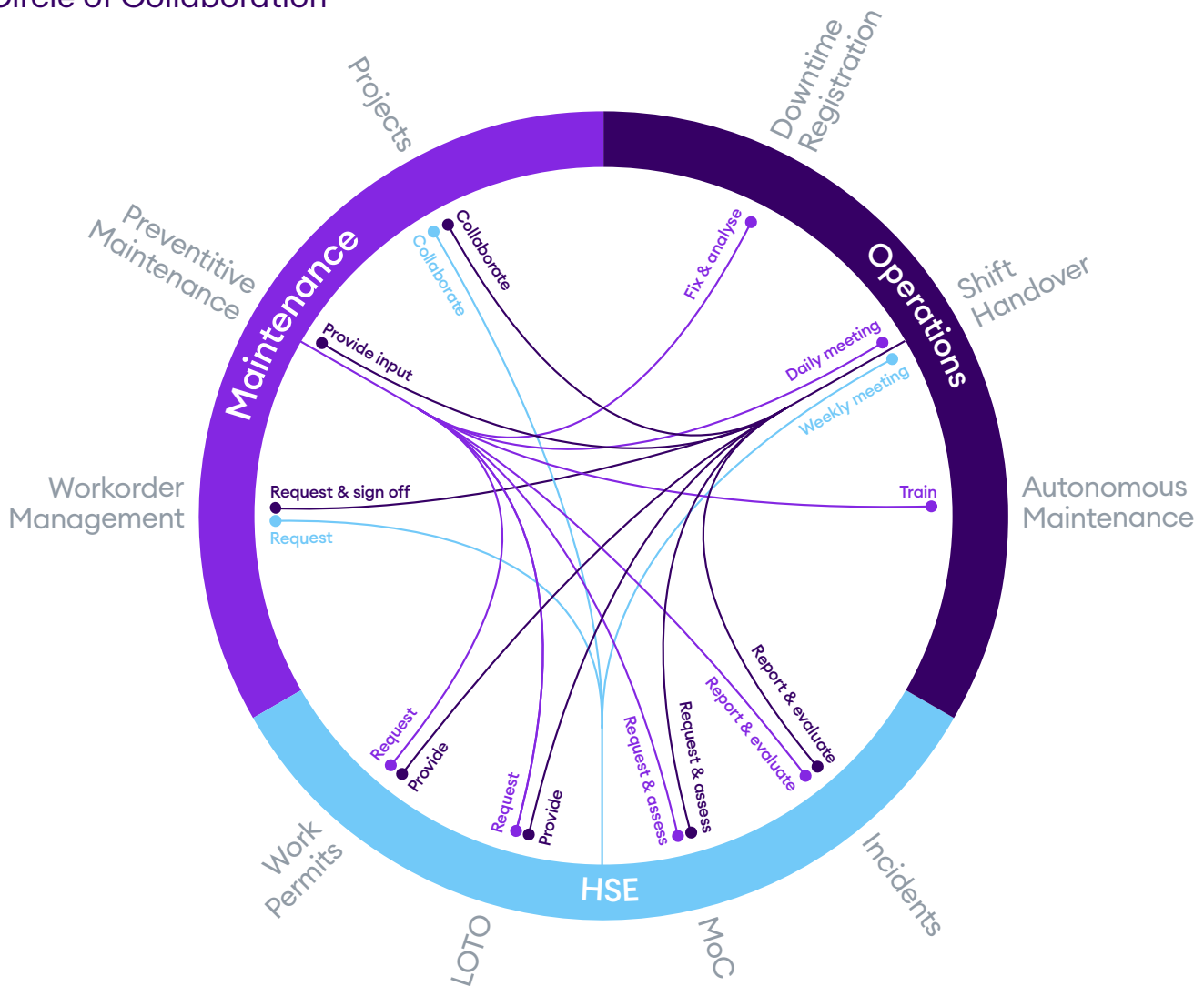
Task planning, checklists, and documentation within the EAM system ensure that all tasks are performed consistently, regardless of the operator or maintenance staff. This way, knowledge, and best practices are used efficiently and passed on within the company.

The EAM software is a critical component of an innovative communication and cooperation model that IFS Ultimo refers to as the Circle of Collaboration. In this model, all team members from operations, maintenance, and health and safety have the means to work together seamlessly and effectively from the EAM platform's single source of truth to achieve the best outcomes—therefore maximizing uptime, minimizing administrative burden, and creating a safe and enjoyable working environment.

Practical examples of collaborative operations

So, how does the Circle of Collaboration work in practice? The circle is divided into three segments, representing each of the primary departments - operations, maintenance, and health and safety. On the outside of the circle are some of the processes each department is responsible for. The lines inside the circle show how these processes interact and connect with other departments, providing a clear pathway to shared responsibility and action and, ultimately, to problem resolution.

IFS Ultimo's Circle of Collaboration



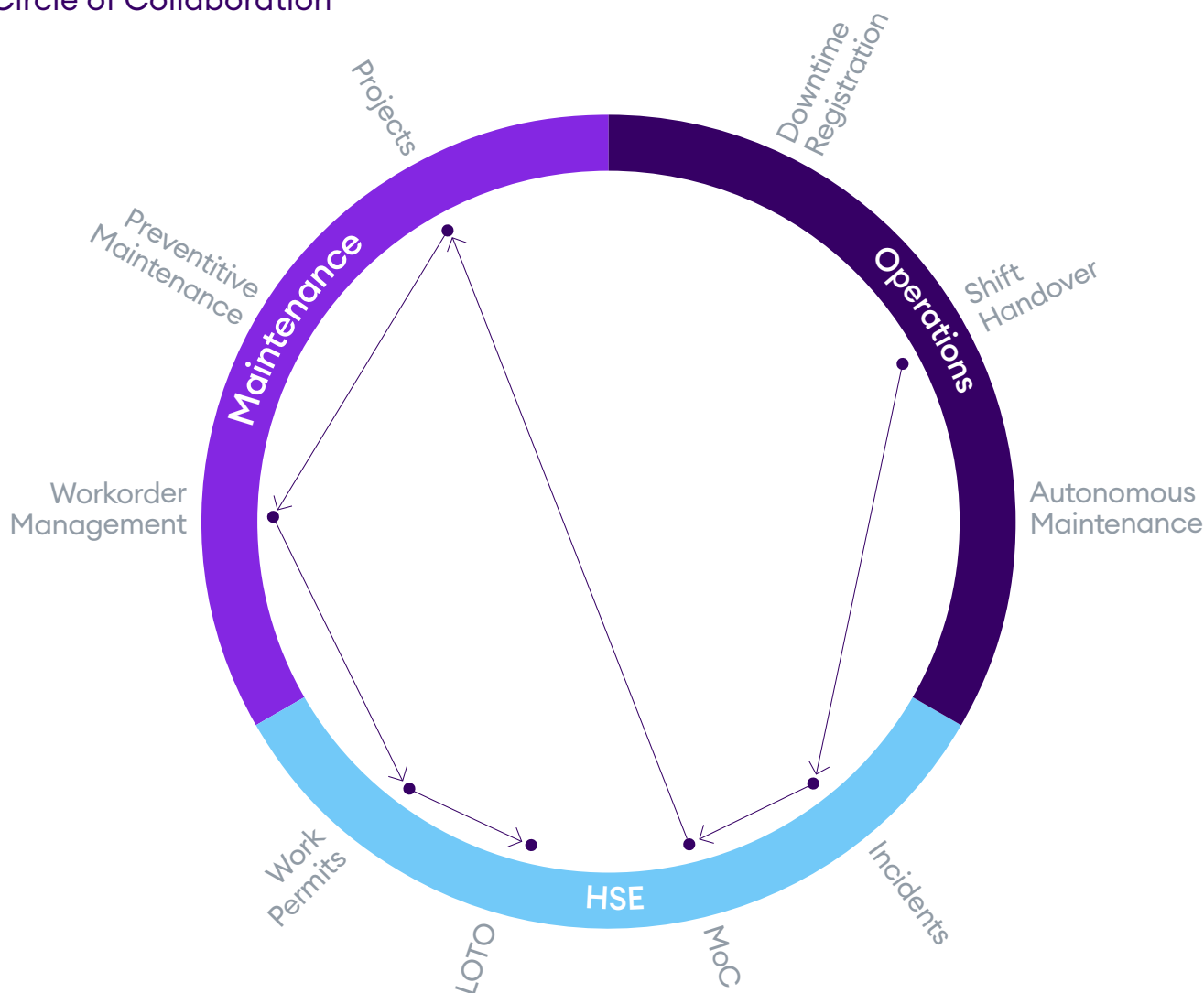
Let us bring that to life with a tangible, real-world example of how operations, maintenance, and health and safety can work together. During a shift, an operator spots a potential HSE risk—two nearby parts on the production line are causing an explosion hazard. So, at shift handover, the incident is entered into the log book, and from that it is reported through the EAM platform to colleagues in the HSE team. After an investigation, it was decided that one of these parts should be replaced with another type. This decision leads to a Management of Change request, where all associated risks are considered.

Once the 'go, no/go' decision has been made, the maintenance team will manage the change through the Projects module. Part of this action requires one or more work orders, and this is handled through the Workorder Management module. A work permit then needs to be issued by HSE colleagues before a Lockout Tagout (LOTO) is ordered to make sure the machine is isolated for safe execution of the job.

So, in this particular example - where a member of the operations team spotted a potentially dangerous issue - the route through the Circle of Collaboration would look as follows:

Shift Handover (Operations) > Incident Report (HSE) > Management of Change (HSE) > Projects (Maintenance) > Workorder Management (Maintenance) > Work Permits (HSE) > Lockout Tagout (HSE)

IFS Ultimo's Circle of Collaboration



The entire process is seamless, accountable, and traceable. The operator that identified the potential risk gains comfort from the fact that they have an effective means of registering the issue and raising it during shift handover. Every team member is enabled to bring the issue to a successful close.

There are plenty of other examples of the Circle of Collaboration in action, all of which show how it can stimulate and facilitate effective communication across departments. For example, the operations suite in IFS Ultimo has been enriched with autonomous maintenance functionality that enables operators to manage specific maintenance tasks such as cleaning, lubrication, and basic inspections. With these tasks recorded within a single source of truth, the maintenance team can focus on more value-added activities, such as larger-scale plant maintenance and modifications.

By encouraging an ethos of 'we operate and maintain together', the Circle of Collaboration leads to less downtime, higher availability, and eventually lower costs.

The model can also enhance asset planning and scheduling, enabling departments to collaborate effectively during planned downtime. All relevant stakeholders can analyze suggested downtime periods and reschedule jobs to better fit the suggested downtime period. Furthermore, it can also support the creation of better failure reports. The mobile nature of the IFS Ultimo platform means any asset can be located, even those hard to reach or difficult to access. This can be done by the scanning of barcodes, QR codes or NFC tags. A photo or video of any issues reported for the asset can easily be added to the mobile work order. From there, the Circle of Collaboration ensures maintenance work can be conducted quickly and safely.

Embedding IT Teams in the Circle of Collaboration

So, that is the Circle of Collaboration in action as it stands today. But how might it be expanded shortly to include relevant colleagues from other departments – further enhancing the spirit of communication and cooperation across an organization?

The most apparent inclusion would be the IT department, which will play an increasingly prominent role in more digitized and interconnected factory environments. In the past, the modernization of many industrial assets was related primarily to mechanical and electrical equipment and would have been managed by the maintenance team. However, these days, plant-wide assets are just as likely to depend on a high level of software integration, requiring oversight of the IT team. The risk, of course, is that a poorly planned and executed software upgrade could significantly impact asset availability.

IFS Ultimo already offers an IT Service Management module for equipment such as laptops and computers. In the future, this module will likely be integrated more closely with technical asset structures, making it easier for departments to cooperate with each other. Then, the IT department would have complete visibility of maintenance planning and production stops, allowing the involved IT professionals to schedule any necessary software updates better. Again, this closer cooperation could reduce downtime and boost plant productivity and profitability.

The Circle of Collaboration might also be extended to include members of the reliability team – who sometimes, but not always, form part of the maintenance department yet often have their own systems and ways of working. While the maintenance team focuses more on minimizing downtime and making repairs, the reliability team takes a more proactive stance. Their responsibility lies in preventing issues before they occur, relying heavily on data analytics and the root cause of failure to deliver continuous improvement. Including these teams in the Circle of Collaboration in smarter industrial environments makes good sense and is the next big step in consolidating and streamlining collaborative efforts.



How Poka can evolve the concept further still

Another exciting development is the recent acquisition of Poka by IFS. This Canada-based provider is complementary to existing EAM solutions. Where IFS Ultimo focuses primarily on asset- and maintenance management, Poka also addresses knowledge sharing, employee productivity, and loss reduction in the production process. The Poka application, delivered on-site through mobile devices such as iPads, enables factory and field workers to be more efficient across all aspects of their jobs, from training and development to troubleshooting.

For example, a night shift operator could use a mobile device to scan a QR code at a workstation and find all the information they need to operate a machine within seconds. The application also includes a dynamic factory feed, encompassing a digital logbook, for all essential production-related information and colleague news posts containing all information from the day shift. There are also training videos on how to perform specific production line tasks and checklists to ensure consistent steps are followed. So, Poka is very much about the training and development and skills management of production line staff, as well as standard operating procedures, best practices, and knowledge sharing. It particularly resonates with the new generation of younger, tech-savvy employees who prefer to work with digital rather than manual systems.

In the future, IFS Ultimo will look at ways to build closer integration between its existing EAM platform and the Poka platform. For example, the shift handover, facilitated by IFS Ultimo, could be enriched by information from Poka's production line feed, allowing issues on the production line to be escalated quickly and effectively. Autonomous maintenance can also be done in IFS Ultimo and Poka, supported by videos and images taken from the factory floor. It is all about extending digital cooperation between maintenance and production teams.



IFS Ultimo – Committed to continuous improvement

So, we have seen how the Circle of Collaboration represents a transformative approach that addresses the critical need for enhanced cooperation and communication between operations, maintenance, and HSE teams. It helps organizations recognize and visualize the interconnected nature of these departments and overcome the challenges that arise from common problems such as siloed operations, misaligned objectives, and cultural differences. By fostering a unified approach, the Circle of Collaboration means stakeholders work towards common goals, leading to optimized asset management, reduced downtime, and a safer working environment.

The IFS Ultimo EAM platform is uniquely positioned to facilitate this collaborative model. Its comprehensive suite of tools centralizes data, streamlines communication, and enables real-time decision-making, empowering teams to break down barriers and work together more effectively. The platform's cloud-based accessibility ensures that all authorized users can access critical information anytime, anywhere, further enhancing collaboration.

IFS Ultimo's commitment to continuous improvement is evident in its plans to integrate additional departments, such as IT and reliability teams, into the Circle of Collaboration. The recent acquisition of Poka to the IFS portfolio means that IFS Ultimo can benefit from the connected worker experience. By integrating Poka's knowledge-sharing and productivity tools, IFS Ultimo aims to create a more cohesive and efficient working environment across all levels of an organization.

In conclusion, IFS Ultimo's EAM platform is not just a tool but a strategic partner in driving industrial organizations toward greater collaboration, efficiency, and safety. By adopting the Circle of Collaboration, companies can achieve higher asset performance, lower costs, and realize a more harmonious workplace. IFS Ultimo stands ready to lead this transformation, making it the go-to partner for implementing this innovative methodology.

About IFS Ultimo

IFS Ultimo is a SaaS EAM solution from IFS, focused on maintenance & safety and well known for a rapid deployment, ease of use and an unparalleled time to value. Details about IFS Ultimo can be found at [Ultimo.com](https://ultimo.com).

About IFS

IFS develops and delivers cloud enterprise software for companies around the world who manufacture and distribute goods, build and maintain assets, and manage service-focused operations. Within our single platform, our industry specific products are innately connected to a single data model and use embedded digital innovation so that our customers can be their best when it really matters to their customers—at the Moment of Service™. The industry expertise of our people and of our growing ecosystem, together with a commitment to deliver value at every single step, has made IFS a recognized leader and the most recommended supplier in our sector. Our team of 5,900 employees every day live our values of agility, trustworthiness and collaboration in how we support our 10,000+ customers. Learn more about how our enterprise software solutions can help your business today at ifs.com.

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