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ISO 55000: Ticking a box or bottom-line value driver?

The Journey towards ISO 55000 Certification

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Steps to Getting ISO 55001 Certified

1. Make a decision about your approach to ISO 55000
2. Do an initial assessment (full Asset Management, not just ISO 55k)
3. Develop an AM policy, strategy, objectives, performance measures and plans
4. Design and implement the rest of the asset management system
5. Implement AM best practices and collect records (“in use”)
6. Do pre-assessment based on ISO 55001 criteria and address shortcomings
7. Get external ISO 55001 certification

1 Decision 1: Why are you doing this? What is the Value?

- The journey will often be a long and hard one – make sure you are doing it for the right reason
- The investment will be in your company's own time and effort. Any consultants that you use will be small change in comparison
- Is there real top management support? A middle management prophet will get promoted and the project will die.
- Do a business case. Assess the loss and waste in the processes and decisions. Use hard numbers to convince top management.
- What is in it for top management?

1 Decision 2: What is the Scope?

4.3 Determining the scope of the asset management system

The organization shall determine the boundaries and applicability of the asset management system to establish its scope. The scope shall be aligned with the SAMP and the asset management policy. When determining this scope, the organization shall consider:

— the external and internal issues referred to in 4.1;

— the requirements referred to in 4.2;

— the interaction with other management systems, if used.

The organization shall define the asset portfolio covered by the scope of the asset management system.

ISO 55001:2014

ISO 55002:2018

The scope should:

a) consider the range, grouping and functional connectivity of the assets involved in delivering an output or outcome to the customers or other stakeholders;

b) address the relevance of the assets considered for inclusion in the scope to be appropriate to the context and purpose of the organization and include all significant assets;

c) identify the organization's units, locations and contractual boundaries.

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1 Decision 2: What is the Scope?

3.1.23
top management
person or group of people who directs and controls an *organization* (3.1.13) at the highest level

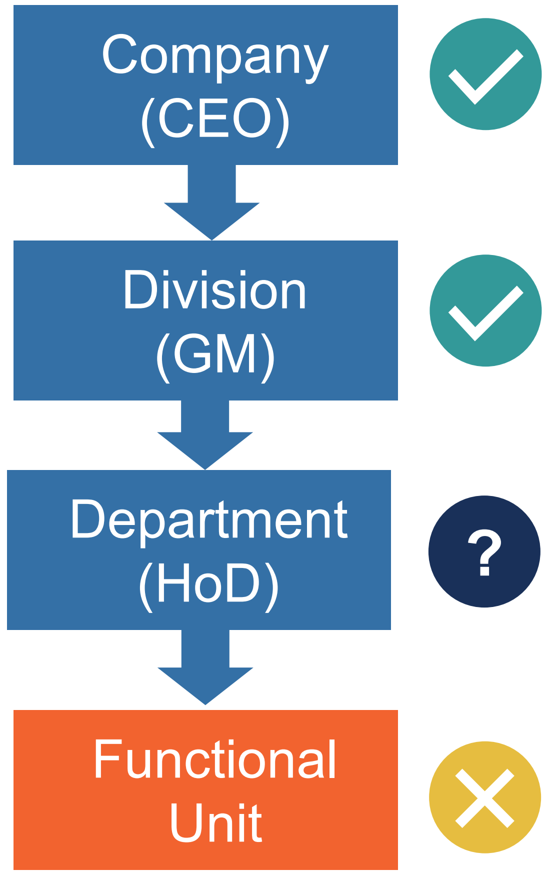
Note 1 to entry: Top management has the power to delegate authority and provide resources within the organization.

Note 2 to entry: If the scope of the *management system* (3.4.2) covers only part of an organization, then top management refers to those who direct and control that part of the organization. If multiple *asset management systems* (3.4.3) are employed, the systems should be designed to coordinate efforts.

ISO 55000:2014

Unlikely "top management" will have the "power to delegate authority and provide resources".

Asset Management should never be just a Maintenance thing!



1 Implications of the Scope Decision

Stakeholders Clause 4.2

Shareholders
Unions
Tax collector
Government/State
Major suppliers

Company

Suppliers Clause 8.3

Vendors
Software Support
Consultants
Landlord
Government/State

HR Oversight Function
Financial Oversight Function
Supply Oversight Function
Customers
Other Divisions

Division or Department

HR Services
Financial Services
Supply Services
Consultants
Contractors
Other Divisions

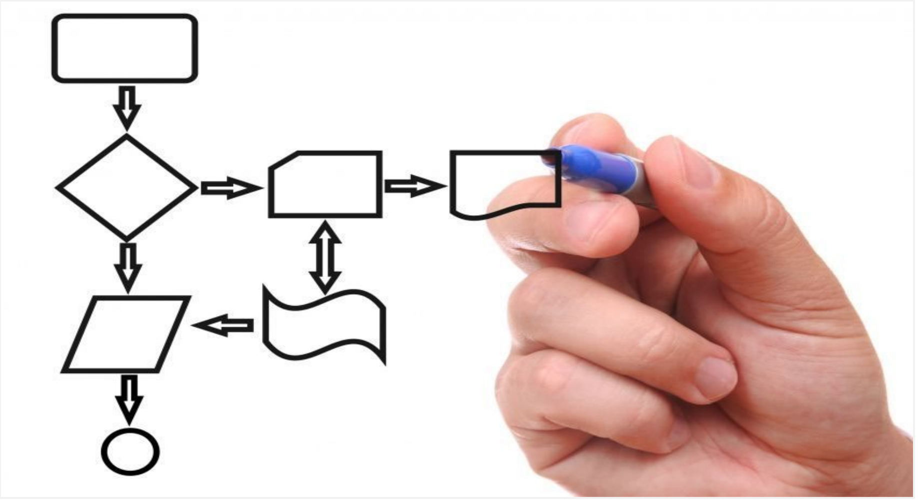
2 Do a Gap Assessment

- Assess your Asset Management against international best practices
- Benchmark you AM KPIs vs international performance standards
- Get a detailed report identifying non-compliance with recommended actions
- Prioritise your initiatives
- Develop a road map
- Use external consultants unless you have experienced staff

3 Develop an AM Policy and Strategic Plan (SAMP)

- Develop/Confirm your AM policy
- Compare it with the current assessment
- Develop an AM strategy to close the gap
- Agree on KPIs with targets to measure strategy achievement
- Prepare detailed plans to
  - develop/implement an AM system
  - manage the assets over their life cycle
- Define clear responsibilities and milestones
- Communicate it to employees to get support

4 Design and Implement the AM System



- Develop/Enhance the AM system according to the project plan
- Confirm which processes will be automated or handled by an EAMS
- Review all AM processes, procedures and templates
- Document new processes / procedures in the required format (refer to ISO 55001)
- Implement these processes and procedures using change management principles (eg ADKAR)
- Establish internal audits to confirm compliance
- Depending on the maturity, this is probably the most work

5 Implement AM Best Practices and Collect Records

- Implement AM best practices as per 39 Subjects, eg life cycle activities and decision making
- Train employees in these AM best practices
- Compile records that all processes are “in use”
- Manage risks proactively through preventive actions
- Monitor the impact of the new processes and systems on performance (AM KPIs)
- Use regular management reviews to drive continual improvement

6 Do Assessment Based on ISO55001 Criteria and Address Shortcomings

- Arrange with an experienced ISO 55001 facilitator to do an internal assessment
- Arrange for feedback to top management, with a detailed gap report. This is a **Do you comply or not**? assessment
- Compile a plan to address gaps, with clear responsibilities and time scales
- Arrange for further internal assessments until no gaps remain
- Report progress to top management and agree when you are ready for certification

7 External ISO 55000 Certification

- Arrange with an ISO 17021/5 accredited CAB to do the final assessment
- Prepare the plant and all documents/records to make it easy for the assessor
- Brief all employees about the assessment
- Support the assessor during the audit
- Arrange for feedback to top management
- Once the ISO 55001 certification is done, communicate and celebrate the event

Certification Acronyms/Definitions

CAAB (Conformity Assessment Accreditation Body)

The local national organisation who has the authority to accredit CABs

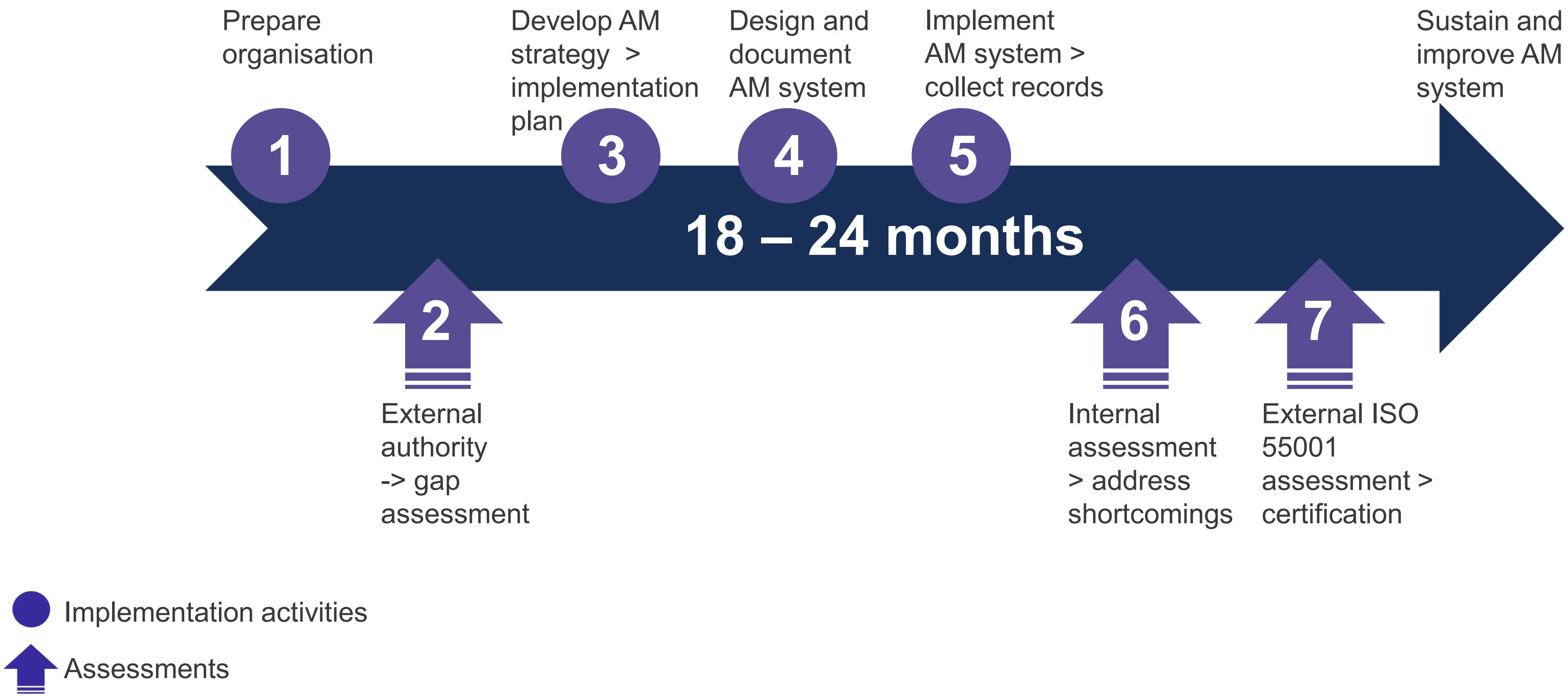
South African National Accreditation System

10613

CAB (Conformity Assessment Body)

Organisation performing the conformity assessment and certification activities

Typical Implementation Timeline



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