

# Seven Essentials

OF A HIGHLY EFFECTIVE EAM IMPLEMENTATION

advoco



# essential

adjective    es • sen • tial

**1** : of, relating to, or constituting  
essence : INHERENT

**2** : of the utmost importance

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The word essential means absolutely necessary. There are many features you need when it comes to your Infor EAM system, but what are the elements that are absolutely necessary for a successful Infor EAM implementation or project?

We don't have a crystal ball. We can't give you a magic bullet for success. But through thousands of implementations and projects, we have found seven elements that are foundational to propel your project forward. This list goes beyond just an Infor EAM project. These items can be applied across your entire organization, and to your life.

## **The Seven Essentials of a Highly Effective EAM Implementation are:**

- 1.** Start with an End in Mind
- 2.** Know Your Team
- 3.** Understand Your Numbers
- 4.** Educate Yourself and Your People
- 5.** Think Differently
- 6.** Get People Involved
- 7.** Lead When You're Not in Charge

When you look at the difference between winning and losing, you must first understand that it is not a one-size-fits-all approach. Success is a delicate recipe that is slightly different for everyone. You start with the same guidelines, and then tailor it to fit your specific needs.

That's what this list of seven essentials will be for you and your organization: a launch point to propel you forward!

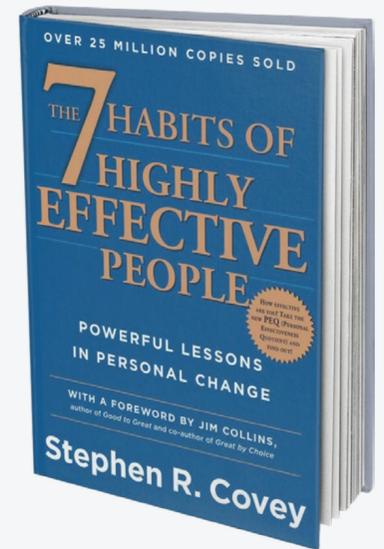
# #1

## START WITH AN END IN MIND

If you read Stephen Covey's book, *The 7 Habits of Highly Effective People*, **start with an end in mind** is the second habit on his list. We think this habit is the most important element, so we moved it to the top spot on our list.

Starting with an end in mind means beginning each day, task, or project with a clear vision of your desired direction and destination, and then working to make that happen. Because after all, how can you know what to do if you don't know where you are going?

Take Alice, from *Alice in Wonderland*. She comes across the Cheshire Cat in the tree and asks him which road she should take. The Cheshire Cat responds by asking where Alice would like to go. Alice tells him that she doesn't know where she'd like to go. "Well any road will get you there," responds the Cheshire Cat.



If you **don't know** where you are going, **any road** will take you there.

How true this is! If you don't have a final destination in mind, you won't know the right path to get there. In business, and in life, the paths you choose lead you to your final destination. But what happens if you don't know what you want your destination to be? Any path will get you there.

When we kick off a project, we always start by asking clients: what does winning look like for this project? What does success look like? It's very common for teams to not have a clear picture of what they want in the end.

Before you roll out your Infor EAM system, you need a vision of how you want the system to perform when it's completed. You need to be able to answer the questions of what the system will do and outline the benefits you want to achieve from project completion. It is imperative to understand where you want to go. Once that is understood, it is easier to focus and execute the project.

Take the time to write your answers down and ask the entire project team to write down their answers. Then, spend time discussing what winning looks like for your entire team. This gets your whole team on the same page about how to achieve success for the project. Then, define what each individual can be doing to work toward that success.

Your intended direction and destination are not always your final direction and destination. In projects, you can hit roadblocks and unforeseen circumstances you could not plan for. In these instances, you need to adapt to go around the roadblock and back toward your intended path. Keep in mind, just because you wrote something down at the beginning of the project does not mean you should be paralyzed that you must do it that way. You may encounter new tools or ways of doing things that can help push you forward in a better or more efficient way. Be flexible as you work toward success.

When you **start with an end in mind**, you give yourself the ability to envision what you cannot see at present. So, envision your success, and challenge your team to envision that success too.

What does  
**winning** look like?



**We're not sure.**

# KNOW YOUR TEAM

In any championship organization, you find a group that **knows its teammates**. And we aren't just talking about knowing what their name is, where they're from, or where they worked before.

In winning organizations, you find people that know what makes their teammates tick: their likes, dislikes, styles, and work habits. They understand who their partners are, and they really trust each other to get the job done. If you don't know your teammates, how can you get anything accomplished?

Personality styles make a huge impact on the way you communicate. Communication is a two-way street, so it is your responsibility to understand how you communicate, as well as how your teammates communicate and receive information.

Stop guessing about the way people act, and instead, work to employ methods that will help you dig into a person's characteristics. A great tool for assisting with this is person-ality profiles.

At Advoco, we use the DISC personality analysis tool. Each member of our team takes a short personality quiz which results in a bar graph that shows a person's levels in

four areas – **D**ominance, **I**nfluence, **S**teadiness, and **C**onscientiousness.

The results of a personality test, like the DiSC, give you insight into how you communicate, and how you would like others to communicate with you. That is why we display the results of the personality profile on our desks – to have the information readily accessible to our teammates communicating with us! We are all different, and we need to understand those differences.





# DISC PERSONALITY ANALYSIS TOOL

Take the example of the announcement of a newborn baby. According to the DiSC assessment, someone who is a high C would have a lot of questions and would want to know detailed information. They will probably ask what time the baby was born, how much it weighs, who the doctor was, and so on and so forth. Someone who is a high D will ask if it's a boy or a girl, and likely not push any further. They want the big picture and get right to the point. Neither style is right or wrong, it is just two different types of communication.

Of course, no personality test is foolproof. People can't be boiled down into just four buckets. We are all a combination of many elements! So, keep in mind not to stereotype based on the results of whatever test you decide to implement at your organization.

When thinking about your team and their personality traits, don't forget a very important player on that team: yourself! You are on the team too.

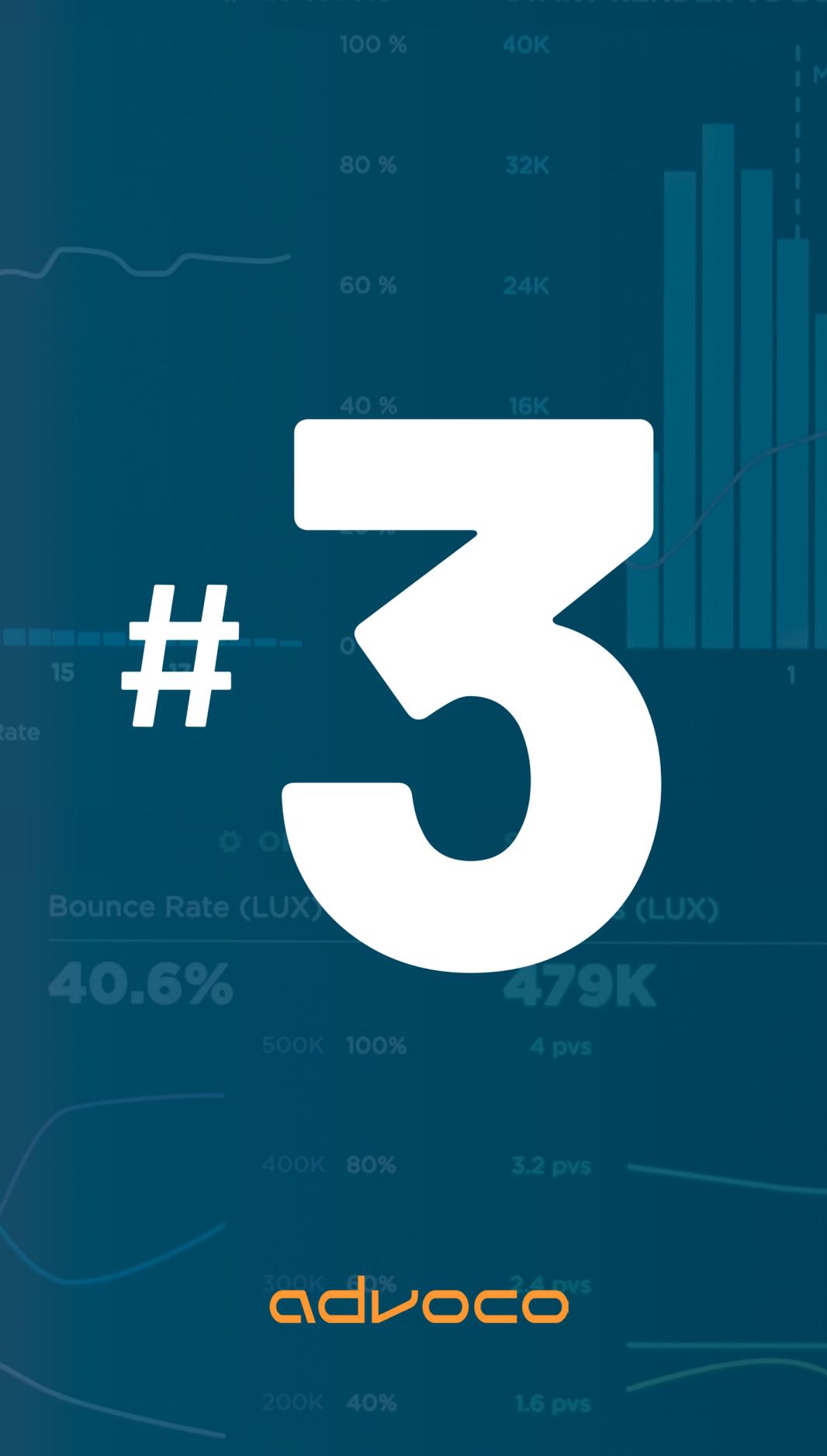
Think back to being a kid on the playground. Do you remember the days of calling captains and picking teams? You're sitting on the sidelines, waiting for your name to be called so you can join a team. The team captain is thinking about what skills they want, and who would be the best teammate to help them win.

Your professional life is a lot like this playground situation. You want to build the best team possible to help you win. What about yourself? As a leader and teammate, you need to ask: would I pick myself for this team? Am I being the teammate I should be? If everyone on your team is asking himself or herself this, you are on your way to building a successful team!

Ultimately, **what makes a team great is the people on it.** No one person is better than the other. It's the blend of different personalities that drives a team to success. To be successful, it is imperative to understand each member of your team on an individual level, how to communicate with each team member, and how they can contribute to the greater good.



It's the blend  
of **different  
personalities**  
that drives a  
team to **success.**



# #3

## UNDERSTAND YOUR NUMBERS

Numbers are not usually our friends. We often lament and say things like, “I’m not a numbers person.” Or, “Numbers aren’t my thing.”

While you might not love numbers, they are critical to your business. It needs to be a top priority to **understand your numbers**.

In the book *The 4 Disciplines of Execution*, the authors discuss the importance of setting a Wildly Important Goal, or WIG, for your organization. It is the one goal that everyone in your organization is driving toward. Everyone knows what the WIG is. You post it, you share it, and you all work toward it. It is something everyone rallies around.

You can’t just set the WIG and move on. You need to set specific goals and measurable items around the WIG. If you don’t, then how will you know if you are moving toward or away from your WIG? Know your numbers and how they relate back to your goal! For example, if your WIG is to reduce maintenance spend by 20%, set smaller measurable goalposts on the way to that WIG, like goals associated to your parts inventory and parts spend or planned and unplanned work.

Once you know the important numbers that support your WIG, create a cadence of accountability. This keeps everyone involved in the project or goal informed of the status. It will help you delegate tasks and create culpability with your project team.

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### What is your Wildly Important Goal?

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And don't forget about sharing your numbers. You shouldn't just keep these numbers to yourself or the core team. Share your metrics with everyone in the organization. Post them somewhere that the entire team can see them and understand your organization's strategic priorities.

Consider athletes. Can you imagine going to a sporting event without a scoreboard? What's the point? You would never be able to tell which team was winning and which was losing. You need that scoreboard to tell you!

Projects are no different. You need a scoreboard to help keep your end goals in mind and show you how you are doing. There are many tools available to you to post your scoreboards – options like Infor's Birst, or Tableau, or PowerBI. The tools are out there, you just need to find what works best for your organization.

When you share your numbers with others, it helps them to understand the importance of the project at hand and where you stand. Take for example, going to your boss or organization owner and being able to show that you saved millions of dollars on your parts spend because of the Infor EAM project you implemented. They're going to pay attention to those numbers! Your numbers help yourself and others understand why your project is critical to your organization's success.

You will never get where you want to go if you do not **understand your numbers**. Take the time to dig in, and help your team understand them too.

### 3 | UNDERSTAND YOUR NUMBERS



# EDUCATE YOURSELF AND YOUR PEOPLE

Learning never ends. To be successful you have to be a **lifelong learner**, and make sure your team is too.

At Advoco, we have a saying that “Leaders are readers.” So, what are you reading? What tools are you taking advantage of to continue learning – about your field, your project, and your industry?

In today’s world, there is so much educational content, specifically around leadership and team management, and even Infor EAM. And we aren’t just talking about books. Podcasts make it easy to listen in your car on your way to work, or a quick YouTube search of authors like Simon Sinek or Patrick Lencioni and you can find thirty-minute videos to watch.



## Podcasts We're Listening To

- *Akimbo*, Seth Godin
- *EntreLeadership*, Ramsey Network
- *A Bit of Optimism*, Simon Sinek
- *Marty's Minute*, Marty Osborn



## Leadership Books We're Reading

- *The Challenger Sale*, Matthew Dixon
- *Start With Why*, Simon Sinek
- *The Goal*, Eliyahu M. Goldratt
- *The Tipping Point*, Malcolm Gladwell





For Infor EAM users, Advoco developed a tool specifically around the software product that allows you to learn from anywhere. This powerful tool, the Connect Education Network, puts training videos and educational content at your fingertips.

When it comes to your Infor EAM implementation, continuing to learn includes training for yourself and your team. Infor EAM is ever evolving, and to get the most out of your system, you need to keep yourself and your team updated. So, the best advice is to train, train, train – yourself and your team.

Having consistent training programs in place will ensure your entire organization is utilizing the software consistently. We have seen many instances where training was not prioritized, and then after five, ten, or twenty years of utilizing the software, everyone in the organization uses it differently.

Continual training helps keep your entire team on the same page and will help everyone to stay up to date on all the software has to offer. If you do not prioritize training, you assume your team is doing it themselves, when in reality, they are not. As we say, when left to their own devices, *people will create their own devices*.

By diving into educational resources, you can reinvent the way you learn and enact meaningful changes. But don't keep the resources to yourself, share them! Encourage your team to read, watch, and make recommendations to each other. Start an organizational book club where you can meet and discuss what you have been reading and watching.

By giving yourself and your team the tools to **keep learning**, you ensure that the best ideas are always just a moment away.

## 4 | EDUCATE YOURSELF AND YOUR PEOPLE

# Prioritize Training

with these resources



### User Conferences

Connect  
Inforum



### Online Training

Connect Education Network



### Community Forums

Connector Community

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# THINK DIFFERENTLY

Too many project leaders are closed-minded. They think the only way to get something done is their way. They are only interested in one way of doing things: their own.

As a leader, you cannot get trapped in this mentality. It is critical that you push to think differently. You can't stop there; you have to push your team to think outside the box as well.

With a high-performance group, you need to challenge the team to think differently. When you do this you will always come up with ideas you never thought about. You can't grow, or encourage your team to grow, if you are stifling ideas.

One major area where leaders need to think differently is a shift from working in the business to working on the business. Force yourself off the treadmill of everyday projects and start looking at the bigger picture. If you spend all your time in the whirlwind, then you will fail to spend time on business strategy and the direction of your organization.



You have to push your **team** to think outside the box.





Allow your team  
to grow into who  
they are **meant  
to be.**

As a leader, one of the best ways to start thinking differently is to “fire yourself.” You read that correctly. You need to kick yourself off the project and let the team you have assembled do the work you know they can do. When you do this, you allow your team to grow into who they are meant to be. And this means you are free to continue to grow into who you are meant to be.

It’s so easy to get caught up in what you have to do to grow the business or make the project successful, that you fail to step back and see that your team is there waiting in the wings with great ideas ready to help.

Think back on 2020. We were all challenged to think differently in one way or another. At the end of 2019 you had no idea what was in store as you ran headlong into 2020. You faced new challenges, like working remotely and not being together with your team. You had to think outside the box and take advantage of a digital transformation happening right before your eyes.

It falls on you to **think differently!** It’s easy to challenge your team to think outside the box but you have to do it too.

# GET PEOPLE INVOLVED

You are in the people business. If people weren't involved, you wouldn't have a team, and you certainly wouldn't have customers. When it comes to your team, **if you don't get your people involved, you're going to end up doing all the work.**

What is one thing money can't buy?

**Time.**

Your time is at a premium. Not even Warren Buffet or Bill Gates can buy more time. There are only so many hours in each day. Spread the work around so you can meet your goals. You need to step back and let your team be involved and help make the project successful.

When the right team is involved and everyone is focused on the success of the project, something special happens. As a project leader, help guide your team to this success.

In Donald Miller's *Storybrand*, he focuses on the importance of making your customers or teammates the heroes of their stories. In movies, and in life, there is a character with a problem. The character needs a guide to help them solve the problem. It is your job to act as a guide for your customers and your teammates.

Take *Star Wars* as an example. Yoda was Luke's guide, and a great guide at that. Could Yoda have fought Darth Vader? Probably, and it would have been easier for him to do it. But Yoda had to serve as Luke's guide, teaching him the Force.



As a leader, think of yourself as Yoda, helping your team get to the next level and achieve success. Think of the mechanics or maintenance technicians in your plants. How can you position your project so that you make them the heroes? As a guide, how can you give them a plan to move forward? You need to share a plan that gives a call to action so they can avoid failure and achieve success.

This paper contains several different ideas for getting people involved – from sharing your numbers, to training, to team personality profiles. Whatever you decide is best for your organization, stick with it! Change does not happen overnight, but it is worth it when it comes.

People are critical to your organization and projects, so take advantage of those around you and **get people involved!**



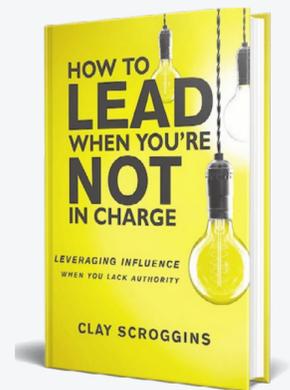
It's your job to be  
a guide for your  
**customers and  
teammates.**

# LEAD WHEN YOU'RE NOT IN CHARGE

Would you say that ultimately, you are the one in charge? When it comes down to it, for the most part, you are not the end-all-be-all final person in charge.

You hear others lament, or you say it yourself, "If I was in charge, I'd do it like this. But I'm not in charge..."

So how do you **lead if you aren't in charge**? In his aptly named book, *How to Lead When You're Not in Charge*, Clay Scroggins addresses this struggle. In the book, Scroggins shares a story about rolling out a new training program at a church he was working at. The program was implemented and it was a complete failure, an utter disaster. After this flop, the project team is sitting in a meeting and all pointing fingers about who did what wrong and whose fault it is. The church leader, Andy Stanley, looked at everyone in the room and said, "Well if something was wrong, why didn't you fix it?"



And that's the crux of leading when you aren't in charge. You can't use lack of authority as an excuse to blame others. Something fails and you site the missteps of others above you as the reason, but you don't step in to try to help. When you are waiting for someone else to tell you what to do, that person has to think about how to do both your job and their job! So why not reduce the burden on your leader and take charge.

You are almost never truly in charge, but that does not negate your ability to lead. Lack of authority is not an excuse. **Leadership is about influence**, not authority. Have you ever had a leader whose favorite line is, "Because I said so"? That person is leading with authority. Now compare that to a coworker or teammate who you always listen to because





You don't need a **title** to do the **right thing**.

you respect their opinions and trust them. That person may not be the official leader of the team or project, but they are leading with influence.

A good barometer for your influence is calling a meeting. W.L. Gore, the company that makes Gore-tex, has a saying that if you call a meeting and people show up, you're a leader. Conversely, if you call a meeting and no one shows up, you might not be a leader.

Leadership is doing the right thing, all the time. It is committing to knowing what is right and doing that thing. You don't need a title to do the right thing. As Andy Stanley says, "Leadership is an unreasonable commitment to what should be."

You need to **lead when you aren't in charge** and encourage everyone on your team to do it too. This way, the project keeps moving forward without waiting for a "boss" to call the shots.

# CONCLUSION

We want to leave you with one final thought: **dream big.**

This needs to be the soul of what you do as an organization, to never stop dreaming and never stop thinking big thoughts.

At Advoco, our big dream was to be published in *Forbes* magazine. As a small company, that's a mighty big dream. When we were a company of less than ten team members, being published in *Forbes* seemed like a longshot. But we kept putting in the work and dreaming big, and in 2019 we were named one of the Best Small Companies in America by *Forbes*.

When you have big dreams and bigger goals, you push yourself and your team to reach, stretch, and grow toward that goal.

How do you keep dreaming big when it seems like you're being beaten back? You have to work together! It is incumbent upon each of us to hold each other accountable to dream big. We're all in the fight for successful projects together. When one of us experiences a win with our Infor EAM system, we all win!



When you dream big, you can put into practice all Seven Essentials of a Highly Effective EAM Implementation. You are picking goals and having an end in mind. Then you need to know your team and involve them. Any successful project needs to incorporate measurable numbers to help you meet your success. Next you need to ensure you have proper educational programs in place to support the goals of the organization. Thinking differently is key to dreaming big as well – push yourself to think outside of the box and see where that takes you. Build trust and get people involved. And finally, lead when you aren't in charge.

Starting an Infor EAM implementation project can be a daunting task, and it's normal to have fears and uncertainties. The path to success is different for everyone, but we believe these Seven Essentials of a Highly Effective EAM Implementation are a toolkit to setting your project on the right course.

Whether you are a large enterprise or a smaller firm, whether you are in the public or private sector, we know this list will help you chart your course for success with your Infor EAM system and beyond.

## | CONCLUSION

## The Seven Essentials of a Highly Effective EAM Implementation

1. Start with an End in Mind
2. Know Your Team
3. Understand Your Numbers
4. Educate Yourself and Your People
5. Think Differently
6. Get People Involved
7. Lead When You're Not in Charge

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