



Beginning Your Journey from Maximo to MAS

Key Questions to Ask Service Providers
When Exploring Your MAS Upgrade Options

Table of contents

03	How to use this guide
03	Set the stage with potential service providers
04	Questions to ask when engaging MAS upgrade service providers
07	Ask how the service provider will support organizational change
08	Successful MAS upgrades don't stop on Go Live Day
09	Find a partner for the journey
09	Confirm who you'll be working with
10	Sample evaluation framework
12	Sample details regarding your current Maximo instance
14	Next steps

How to use this guide

You know your legacy Maximo system needs an upgrade to Maximo Application Suite. But when you face aligning internal stakeholders, communicating project requirements, and evaluating service providers, it's easy to feel overwhelmed – or worse, overlook critical questions that could derail the entire project.

Informed by hundreds of Maximo implementations and upgrades, this guide is designed to support early stages of your MAS upgrade journey. It outlines key questions to help structure your discussions with internal stakeholders and potential partners, clarify requirements, and explore different approaches to upgrading, hosting, and supporting MAS environments.

Customize to your requirements

The questions in this guide are intended to support exploratory discussions and should be adapted based on your organization's specific requirements, internal processes, and procurement policies.

Set the stage with potential service providers

Before you specify technical requirements, first align with your internal stakeholders and communicate relevant information to service providers.

Organizations often choose to share:

- Whether you're seeking support with a commercial upgrade, a technical upgrade, roadmap strategy and planning, hosting solutions, or ongoing infrastructure or application support
- Your business goals, including how you expect to measure success
- When you expect to choose a service provider and begin the project
- Any timeline constraints you anticipate, such as expiring software licenses or resource changes, that would impact the project plan or completion deadline
- The decision-making and communication process you expect to follow, including who will lead the project from your side
- Key characteristics of your current Maximo system that must be considered to ensure continuity of operations, such as custom scripts you'd like to replace, integrations that must be maintained or added, etc. (At the end of this guide, you'll find a list of technical details to prepare for in-depth service provider conversations.)

Once you've aligned everyone on the big picture, you're ready to dive into the details. In the next section you'll find a list of common questions to help you and your service provider properly scope a Maximo upgrade project and determine the best type of partnership for your needs.

Questions to ask when engaging MAS upgrade service providers

You don't want a service provider who is using your MAS upgrade project to learn on the job. The depth of a service provider's experience can influence delivery outcomes, timelines, and overall risk management. Asking the right questions early can help surface assumptions, clarify expectations, and ensure alignment between your organization and potential partners.

When engaging with service providers, it can be helpful to explore their experience implementing, upgrading, and integrating Maximo Application Suite (MAS). Organizations often benefit from working with partners who have a deep understanding of the latest MAS capabilities and proven processes and methodologies that can be adopted to your technology requirements and IT environment.

Experience, approach, and capability questions

Experience & Certifications

Is the service provider an IBM Platinum Partner specialized in Maximo?

How many years of experience does the service provider have with Maximo?

How many IBM Maximo and industry certifications does the service provider have?

Has the service provider completed at least 10 upgrades or implementations of Maximo Application Suite (MAS)?

Team Experience, Certifications, and Location

Does the service provider team:

- Include IBM Maximo certified members?
- Include experts in IBM Red Hat?
- Include people certified in Project Management best practices?
- Offer local or near-shore resources?

Project Implementation Methodology

Has the service provider provided details on a Project Implementation Methodology based on best practices, including deliverables?

Questions to ask when
engaging MAS upgrade
service providers

Reliability Methodologies

Does the service provider have expertise in one or more reliability methodologies:

- Failure Mode and Effects Analysis (FMEA)?
- Reliability-Centered Maintenance (RCM)?
- Risk-Based Inspection (RBI)?
- Root Cause Analysis (RCA)?
- Certified Maintenance and Reliability Professional (CMRP)?
- Institute of Asset Management (IAM)?
- Certified Reliability Leader (CRL)?

Technology Supported

Does the service provider support Maximo-supported database types:

- DB2?
- Microsoft SQL Server?
- Oracle Database?

Mobile

Does the service provider have experience upgrading mobile solutions to work with MAS or replacing legacy mobile solutions using MAS Mobile?

Integrations

Can the service provider integrate MAS with [Include systems your company uses]:

- ERP system (e.g. SAP, Oracle)?
- HRIM system (e.g. Workday)?
- Third-party mobile application?
- Digital Twin solutions?
- Reliability solutions (RCM, FMEA)?
- Custom or industry applications (provide specific information)?

Questions to ask when engaging MAS upgrade service providers

Data Migration & Management

Does the service provider have a thorough data migration process including integrations, data preparation, configurations, and custom process workflows?

Will the service provider ensure minimal downtime during migration or upgrades? (Describe your requirements)?

Will the service provider ensure near real-time data replication during migration or upgrades?

Will the service provider convert databases between different compatible Maximo database types to facilitate cloud migration?

Security & Compliance

Will the service provider be able to design a secure architecture able to reach the Internet for updates (e.g., zones, airgap)?

Does the service provider support ISO 14001 requirements?

Will the service provider support cybersecurity requirements for a specific geography and industry (e.g. UK Cyber Essentials)?

Does the service provider support the following standards:

- Asset management (ISO 55000)?
- Risk management (ISO 31000)?

Go Live Preparation

Will the service provider provide Development, Test, and Production environments and/or Development and Production environments?

Will the service provider provide a detailed production cutover plan?

Will the service provider provide User Acceptance Testing?

Will the service provider provide System Integration Testing?

Will the service provider provide Quality Assurance support?

Ask how the service provider will support organizational change

Many organizations underestimate the organizational change component of upgrading from Maximo to MAS. MAS is more than a technical update; it introduces a new way of working that may include new communication workflows and decision-making processes. Consider these factors from the start by asking potential service providers about their expertise and approach to transfer knowledge and support user adoption.

Adoption questions

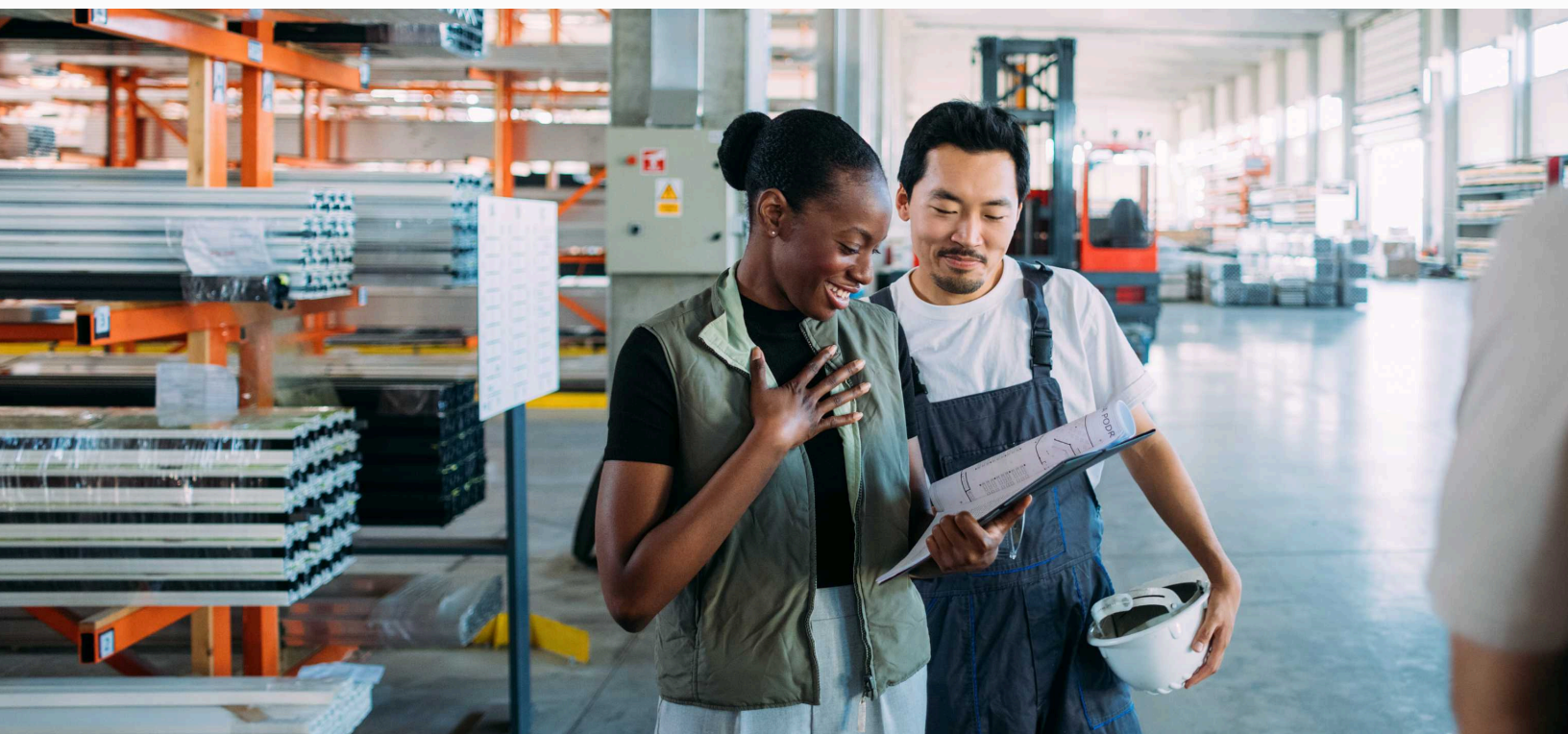
Organizational change management

Is the service provider certified in organizational change management best practices?

Training

How does the service provider approach user and system administrator training? Will their strategy cover:

- Topics / Courses?
- Employee roles involved and approach (i.e., Train-the-Trainer vs. End User)?
- Training documents?



Successful MAS upgrades don't stop on Go Live Day

If you're considering a hosted or managed service model to help with ongoing management of your MAS environment, the following questions can help clarify available options and delivery approaches.

MAS hosting and managed services questions

What hosting models does the service provider offer (e.g., dedicated environments, cloud providers such as AWS)?

Will hosting be located in specific regions to meet data compliance requirements?
[Insert regions]

What uptime commitments are typically offered, and how are these defined within SLAs?

How is infrastructure provisioned and isolated across environments so it's not co-located with other users' data or access?

Will the service provider support a multi-zone and high availability deployment model?

Does the service provider's hosting environment have compliance certifications such as SOC 1, 2, 3, and ISO 27001?

Does the service provider support databases? [DB2, Oracle, SQL]

Will architecture design and administration align with IBM best practices for High Availability, backup and recovery, and performance optimization?

Will the service provider provide 24/7 global support for P1 issues?

Will the service provider provide end-to-end provisioning, installation, and maintenance of the full stack, including networks, servers, storage, operating systems, middleware, databases, application and other crucial component services?

Will the service provider provide continuous monitoring and logging to ensure infrastructure and application health?

Will the service provider provide ongoing hardware and software updates to keep pace with IBM's continuous releases and changes to third-party APIs?

Will the service provider provide database administration, patch management, testing, and validation?

Will the service provider provide network security, threat detection, and incident response?

Will the service provider meet required response and Recovery Time Objectives for critical and high priority issues? [Insert hours]

Successful MAS upgrades
don't stop on Go Live Day

Find a partner for the journey

Support questions

What support models are available (e.g., 24/7 global support), and how are SLAs structured (e.g., response times for P1/P2 issues)?

Will the service provider provide proactive health assessments for Maximo including regular SSL audits, log reviews, license monitoring, and integration checks?

Many MAS upgrades begin with the foundational MAS module, Manage. After the initial upgrade is complete, organizations often explore more advanced modules and develop a roadmap to maximize long-term value from their MAS investment.

Ask the following questions to verify how the service provider may support evolution and future planning for your asset management practice.

Roadmap strategy and planning questions

Will the service provider identify opportunities to expand our MAS implementation by utilizing additional modules (Health, Predict, Reliability, Investment Planning, etc.)?

Will the service provider develop a post-upgrade roadmap, including timelines and resources required to meet high priority goals?

Confirm who you'll be working with

In addition to answering the above questions, you may want to also request a clear view of the project team structure and key personnel. This may include information about each person listed, including their title, resume, and location (s) where work will be performed. It can help you assess how responsibilities are distributed, the level of expertise assigned to key workstreams, and the overall continuity and scalability of the delivery model.

Sample evaluation framework

Organizations use a range of factors to compare different service providers or delivery approaches, depending on their priorities and internal evaluation frameworks. Below is a sample that you can adjust to your specific needs.

① Ability to meet stated requirements

Proposals will be evaluated against the ability to meet requirements detailed above.

② Methodology and management plan used for the project

Proposals will be evaluated against the methodology questions set out below:

1. How comprehensive is the methodology and does it depict a logical approach to fulfilling requirements?
2. How well does the methodology match and achieve the objectives set out?
3. Does the methodology align with the time schedule?

Proposals will be evaluated against the management questions set out below:

1. How well does the management plan support all the project requirements and logically lead to the deliverables required?
2. Is the organization of the project team clear?
3. How well is accountability completely and clearly defined?
4. To what extent does the service provider already have the hardware, software, equipment, and licenses necessary to fulfill the contract?
5. To what degree is the proposal practical and feasible?
6. To what extent has the service provider identified potential problems or issues and possible solutions to mitigate or negate those problems or issues?
7. Has the service provider gone beyond the minimum tasks necessary to meet the objectives?

Sample evaluation framework

③ Experience and qualifications

Proposals will be evaluated against the questions set out below:

1. Questions regarding the firm:

- How experienced is the firm with Maximo?
- How well has the firm demonstrated experience in completing similar projects on time and within budget?

2. Questions regarding the personnel:

- Do the individuals assigned to the project have the required certifications?
- How extensive is their experience on similar projects?

④ Contract cost

Proposals will be evaluated against total cost



Sample details regarding your current Maximo instance

Your potential service provider will likely require details on your current Maximo system implementation and IT environment. Preparing this information in advance can help enable more informed and efficient discussions.

Information	Your Maximo Environment
Maximo version	
Maximo location	
Number of environments	
Database Type (DB2, Oracle, SQL Server)	
Database version	
Database size (in GB)	
Mobile solution	
Maximo industry add-ons	
Third-party tools/add-ons	

Existing Maximo Licenses	
Authorized	
Concurrent	
Anywhere	
Other Users Type (Express, Limited etc.) and Count	

Integrations	
Current Integrations	

Disaster Recovery	
Recovery Time Objective (RTO) required (time between disaster and full recovery)	
Recovery Point Objective (RPO) required (amount of data which could be lost)	

Sample details regarding your
current Maximo instance

User Authentication and Synchronization	
Do you use AD Integration for authentication?	
Is LDAP integration used for authentication or user/group synchronization?	



Next steps

The questions in this guide are intended to be directional. You can adapt and prioritize based on your organization's specific business and technical requirements. Not all questions will be relevant in every context, and the depth of exploration may vary depending on your goals and operating model.

As you move forward, these discussions can help clarify priorities, identify potential risks, and shape a more informed approach to your MAS upgrade journey.

How Cohesive can help

Cohesive helps organizations accelerate their MAS journey—from strategy and architecture design through implementation, optimization, and long-term value realization.

Contact us to speak directly with a MAS upgrade expert to help with your MAS upgrade initiative.



Get in touch

www.cohesivesolutions.com

Cohesive

Cohesive is your trusted global advisor and system integrator for IBM Maximo. Owner-operators at asset-heavy organizations partner with us to bring together siloed processes and deliver insights to decision-makers at every level. As an IBM Platinum Partner, we help customers maximize the return on their Maximo investment, improving reliability, safety, and efficiency, extending asset life, and reducing risk.