

MUWG FALL CONFERENCE DENVER, CO SEPTEMBER 15-18



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MUWG
MAXIMO UTILITY WORKING GROUP

MAXIMIZING
SUSTAINABILITY AND
EFFICIENCY WITH
MAXIMO

Hosted By:



GREETINGS FROM MUWG!

Welcome to Denver—where innovation meets the Rockies! The MUWG Management Committee is excited to invite you to our Fall Conference in the vibrant city of Denver, Colorado.

We're proud to share that MUWG was recently named "**Best Maximo User Group**" at the Maximo User Choice Awards! This recognition is a celebration of our dynamic community—you, our members, contributors, and supporters—who make MUWG a powerhouse of collaboration, knowledge, and innovation.

This conference's theme, "Maximizing Sustainability and Efficiency with Maximo," reflects our shared commitment to driving operational excellence while championing environmental stewardship. We're especially honored to be hosted by the City of Fort Collins, a leader in sustainability and smart city innovation.

Whether you're a seasoned Maximo expert or attending your first MUWG event, **this conference offers something for everyone:**

- **Inspiring keynotes** and real-world case studies
- **Hands-on learning** sessions and technical deep dives
- **Networking opportunities** with industry leaders and peers
- **A chance to explore Denver**, one of the most exciting cities in the U.S.

MUWG continues to be the trusted forum for Maximo users across the utility industry and beyond. Each conference is a chance to exchange ideas, discover new solutions, and build lasting connections. We encourage you to get involved—ask questions, share your experiences, and even consider presenting at a future event. Your voice is what makes this community thrive.

A heartfelt thank you to our sponsors, IBM, the MUWG Board of Directors, MUWG Administration, and especially the MUWG Management Committee. Your support makes this event possible.

So, pack your bags, bring your curiosity, and get ready to "GET OUT THERE AND NETWORK!" We can't wait to see you in Denver!

- **Janie Mann**, MUWG Management Committee Chair



MUWG - Best Maximo User Group

The **MAXIMO USER CHOICE AWARDS**, hosted by Maven Asset Management, is a fully community-driven celebration of innovation and excellence. Winners were chosen by the Maximo community, ensuring authentic recognition of outstanding achievements.

BEST MAXIMO USER GROUP acknowledges that MUWG has fostered collaboration, shared insights, and supported the Maximo community with exceptional events and initiatives that have enriched the Maximo community.

MUWG is distinguished by its support, engagement & the value it provides for its members. Thank you, our members, for voting for us and being part of the community.



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PRE-CONFERENCE ACTIVITIES

MONDAY, SEPT 15

IBM Maximo Location Based Service Development Partner Meeting

9:00a-11:00a | Registration Required - email Thiago Geraldi - tgeraldi@ibm.com

Preconference Networking Event - Golden City Brews n' Views Tour

10a-2:30p | Meet in Marriott Lobby at 9:45a for motorcoach transportation to event.

\$80 per person & registration required



We welcome you to join us here in colorful Colorado for an incredible day out for some brews & views with Aspire Tours. Explore breathtaking views of the great Colorado plains to the east, towering mountains to the west, and the beautiful town of Golden, CO!

Golden City Brewery - enjoy a flight of the brewery's top offerings.

Lookout Mountain - sitting at 7,377 ft. high in elevation, Lookout Mountain is a foothill on the eastern flank of the Front Range.

New Terrain Brewing Co. - Come together for lunch, drink flights, networking and fun. Pricing includes tasting flights, lunch, chartered transportation and a commemorative MUWG pint glass. (dietary restrictions and non-alcoholic options available)

Event Sponsor:



MaxTECH IT User Group Meeting

2:30p-4:30p

- Registration Required | [Click here to RSVP.](#)

MUWG First Timers Orientation

4:30p-5:00p

- Join us to learn how to get the most out of our conference!

Using Guidebook - MUWG Conference Mobile App

5:00p-5:30p

- Learn how to download and navigate MUWG Conference Mobile App.

Conference Registration & Welcome Reception

5:30p - 8:00p

- **Welcome to Denver!** Check in for the Conference to receive badge and welcome gift. Then, join us for cocktails, lite bites & live music.

Hospitality Night Independently Sponsored by:



Music Sponsor:



DOWNLOAD THE GUIDEBOOK APP



- **Locations of Sessions**
- Build your Conference Schedule
- **Connect with Attendees & Exhibitors/Vendors**
- Access Agenda & Presentations
- **Complete Overall Conference Evaluation**
- Add to Photo Album

DAY 1 - TUES, SEPT 16

GENERAL SESSIONS

7:00a-8:00a

CONTINENTAL BREAKFAST

8:00a-8:30a

Opening Remarks

Janie Mann
MUWG Management
Committee Chair

- Introductions
- MUWG Business Updates
- Agenda Updates

8:30a-9:00a

City of Fort Collins Keynote Presentation

Travis Walker
Director of Light
& Power

9:00a-9:30a

City of Fort Collins Water Presentation

Andrew Gingerick
Director of Water
Field Operations

9:30a-10:00a

IBM Maximo App Suite - Product Update & Roadmap Overview

Stan Smith
IBM Program
Director, Maximo
Product Mgt

Maximo Application Suite continues to evolve with an expanding focus to cover asset lifecycle and performance management. This summary session will talk about recent updates and our plans going forward for all aspects of asset management including monitoring, mobility, scheduling, AI, sustainability, industry driven functionality, and modernization. This session will be covered in detail in the afternoon breakout session with time there for Q&A.

10:00a-10:45a

MORNING BREAK - refreshments provided

10:45a-12:00p

Kick-Off Sessions

Day 1 'kickoff sessions' are an opportunity to meet and network with other attendees that are interested in similar topics and session categories. These sessions typically include introductions, conversation on session category topics and facilitated discussion by MUWG Committee Members. Participation is encouraged!

Fall 2025 kickoff sessions include: AI, IT, Mobility, Power Generation, Supply Chain, Telecom, Transmission & Distribution and Water/Wastewater & Pipelines.



AI - Artificial
Intelligence



Information
Technology



Mobility



Power
Generation



Supply
Chain



Telecom



Transmission
& Distribution



Water /
Wastewater
& Pipelines



Maximo 101
(No Kick-Off
Session)

Look for these icons throughout the agenda, each one highlighting the primary focus of a session.

12:00p-1:00p

LUNCH - A plated lunch to promote discussion among attendees.

DAY 1 - TUES, SEPT 16

AFTERNOON 1ST BREAKOUT SESSIONS 1:00-2:15

IBM DEMO ROOM

Maximo Manage Supply Chain | Maximo Mobile - Inventory Applications

The demo room provides an open forum for your questions with answers from IBM Experts. There are no scheduled presentations, but please bring your questions.

1

IBM Maximo Application Suite – Product Update & Roadmap Deep Dive

Stan Smith & selected IBM Team Members - IBM

Purpose: Innovating Maximo for tomorrow – an update on offerings and roadmap from IBM with interactive Q&A.

Content: Maximo Application Suite continues to evolve with an expanding focus to cover asset lifecycle and performance management. We have expanded our offerings and will continue to grow both capabilities and each of both deployment and management. This session will talk about recent updates and our plans going forward for all aspects of asset lifecycle and performance management including manage, monitor, mobility, scheduling, AI, sustainability, industry driven functionality, and modernization.

2

Operating as One - Building Success Through Partnership

Judy Geisick - City of Fort Collins Utilities

Purpose: In today's rapidly evolving asset management landscape, true business success is achieved not just through technology but through strong, collaborative partnerships. In this session, The City of Fort Collins will share their journey of "Operating as One"—a model of close cooperation that has driven transformative results in the City's Maximo environment. We will explore how open communication, shared goals, and mutual trust have enabled our teams to break down silos, respond quickly to challenges, and deliver solutions that align with both operational needs and strategic vision.

Content: What sets this presentation apart is our willingness to share not only our successes but also the real-world challenges and lessons learned along the way, including candid examples of how we navigated setbacks and built resilience together. Attendees will hear directly from both client and consultant perspectives, offering a 360-degree view of what it takes to build a truly unified partnership. Join us to discover how operating as one can elevate your organization's asset management success and foster a culture of trust and innovation that endures beyond any single project. Judy will be assisted by Frank Morphis, ABS Consulting.

3



Maximo and Power BI – “Empowering Everyone with Maximo & Power BI Dashboards”

Maryann Wood - Chelan County Public Utility District

Purpose: Maximo and Power BI Dashboards – Dashboards for Crews, Management and Hydro Generation Assets.

Content: We're making real-time operational and asset insights available to everyone—by integrating IBM Maximo data with the powerful visual capabilities of Power BI Dashboards. Using Power BI Desktop and Power BI Service. Next let's open the discussion and share ideas and data journeys with Maximo and Power Dashboards.

4



Electronic Inspections in Maximo and Demonstration in the EZMaxMobile App

Anna Cayko - Kinder Morgan

Purpose: The purpose of this presentation is to walk users through how to create, attach, implement and complete an electronic inspection in the Maximo platform. Users will also be shown a demonstration on how to find and complete the electronic inspection on the EZMaxMobile App as well.

Content: Users will be able to use electronic inspections when deemed appropriate by attaching a required form to the job plan. This will help to eliminate paper documentation used to complete an inspection as well as being able to store the history of all inspections on the Maximo PM. Benefits of using an electronic inspection over a paper inspection include:

1. Eliminating the need to store paper copies of inspections on site.
2. Electronic inspections are readily available, for the duration of the PM, regardless of which employee completed the inspection.
3. Users will not be able to close out a work order without completing an electronic inspection first. This ensures the work was completed in the required time frame and no tasks were missed during the inspection.

DAY 1 - TUES, SEPT 16

AFTERNOON 1ST BREAKOUT SESSIONS 1:00-2:15

5



Automation of Transactions for Receiving and Invoicing Goods and Services

Braulio Martinez - Florida Municipal Power Agency

Purpose: The Florida Municipal Power Agency is currently implementing a proven solution for Maximo to streamline equipment receipt and the generation of related invoices and documentation.

Content: This presentation will begin with a brief overview of our organization, followed by an exploration of the common challenges many teams face in managing invoice processing—such as delays, difficulties in matching invoices with purchase orders, and issues that arise when invoices are received before a PO is created. We'll then share the steps we took to streamline this process, including key considerations during solution selection, implementation, and integration with existing systems. The session will cover process changes and workflow adjustments that were essential to improving operational outcomes. We'll also provide a walkthrough of the receiving and invoicing workflows to illustrate how automation and system alignment can enhance efficiency. Finally, we'll review the tangible benefits we've observed, including improved turnaround times, cost reductions, and greater overall consistency in accounting operations.

6



Streamlining Maximo Development with DevOps Automation

Martin Merryman - Tallgrass Energy

Purpose: In this session, we'll explore how our team has integrated IBM Maximo with Azure DevOps to bring structure, speed, and reliability to our development lifecycle. By leveraging DevOps best practices, we manage our work using Epics, Features, and Bugs in Azure Boards and use dedicated feature branches to isolate development tasks. Code and configuration changes flow through a disciplined branching strategy aligned with our three core environments—Dev, Test, and Prod. We've implemented automated CI/CD pipelines that deploy changes as soon as a Pull Request is approved and completed, whether those changes involve automation scripts, application configuration, or screen updates.

Content: This talk will walk through our branching model, pipeline design, and lessons learned as we moved from manual deployments to a fully automated delivery process that improves traceability, reduces risk, and accelerates Maximo enhancements. Martin will be assisted by Kim Walter, A3J Group.

7



Maximo 101: Maximo Application Suite (MAS) 9.1 Administration

Derek Fu - IBM

Purpose: The Maximo 101 Track of presentations is designed for those attendees who are evaluating Maximo and Maximo applications, new to Maximo, or have very little experience with Maximo. This interactive session is designed to offer high-level information on MAS 9.1 Administration. The MAS introduces an enhanced administration interface designed to streamline the management of applications, users, user access, licenses, and AppPoints usage. This presentation outlines MAS administration capabilities and Attendees will witness live demonstrations showcasing various activities and configurations.

8



Cut the Trees and the Outages with Maximo Vegetation Management

Tiffany Ly & Robbie Berglund - IBM

Purpose: With Maximo Vegetation Management, users can prioritize critical trimming efforts across the entirety of their service area. IBM AI with remote sensing data can provide customers vegetation insights from their Distribution and Transmission assets. See how these Key Performance Indicators are sent directly into Maximo to help you prioritize, plan, schedule and execute vegetation work orders.

Content: Maximo Vegetation Management is a new offering available in MAS 9.1 as an add on to Maximo. The new features will make it easier for vegetation managers to leverage the vegetation insights of their service area.

9



Maximo Renewables' Advanced APM Capabilities, Synergy with Maximo and Sneak Peek into Roadmap

Kimi Jasuja - IBM

Purpose: This session presents a live walkthrough of IBM Maximo Renewables, highlighting its advanced capabilities in Asset Performance Management (APM) for organizations managing renewable energy portfolios. From centralized data control to proactive risk mitigation, learn how Maximo enables smarter, faster, and more sustainable operations leveraging end to end capabilities of MAS with Maximo Renewables for overall Asset Lifecycle Management.

Content: The presentation will showcase these key capabilities: 1. Holistic Performance Insights, 2. Data Centralization with Governance, 3. AI-Powered Drone Inspections, 4. Data science and ML based Analytics- Solar, Wind and Battery Energy Storage (-Loss bucketing -String analysis -Wind Analytics- Turbine prognosis -BESS- Weak module detection, Autocycle detection) 5. Sneak peek into roadmap (-Integration with Manage -Automated onboarding -AI based Wind analytics- Wind turbine ranking, Loss bucketing and much more.), 6. Recommendation Engine, 7. Customizable dashboard, Trends.

2:15p-2:45p

AFTERNOON BREAK - refreshments provided

DAY 1 - TUES, SEPT 16

AFTERNOON 2ND BREAKOUT SESSIONS 2:45-4:00

IBM DEMO ROOM

Maximo Scheduler

The demo room provides an open forum for your questions with answers from IBM Experts. There are no scheduled presentations, but please bring your questions.

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Hints and Tips On Moving to Maximo Application Suite SaaS. Lessons learned by the IBM MAS Tiger Team

Gurmeet Arora & Scott Wallace - IBM

Purpose: Since early 2021, the IBM Maximo Application Suite Dedicated and SaaS offerings has been migrating / upgrading over 60+ clients from the existing Maximo EAM application to Maximo Application Suite Manage.

Content: This presentation will share key lessons learned from the migration and upgrade process to the Maximo Application Suite. We'll cover essential planning steps, critical questions to address, necessary pre-conditions, and the upgrade journey itself. Based on the choices clients make, we'll highlight potential challenges to consider early, helping you avoid complications later in the upgrade process. While each client's journey is unique, there are common themes that apply, no matter your current starting point or path to the Maximo Application Suite.

11

Facilities Intelligence: Leveraging Maximo Data for Operational Excellence

Jessica Williams - Tennessee Valley Authority

Purpose: This session presents the data analytics program we developed for Facilities to maximize the value of Maximo. By structuring data and maintaining complete, accurate records, the program delivers actionable insights that help reduce downtime and support data-driven decision-making across the business unit.

Content: This session will highlight our approach to building an integrated analytics program that connects Maximo modules with tailored Power BI dashboards. We will discuss strategies for organizing and standardizing data to improve reporting accuracy and usability. The presentation will also cover how automation supports timely insights and proactive maintenance. Key challenges, lessons learned, and future plans for predictive analytics will be shared. Attendees will leave with practical ideas to leverage Maximo data for enhanced operational performance.

12

Maximo Spatial in Action: Real-World Applications and Insights

Thiago Iunes & Thiago Geraldi - IBM

Purpose: Explore the full potential of Maximo Spatial in this engaging session featuring a realistic and hands-on use case. Attendees will be guided through a practical scenario that demonstrates the latest enhancements and powerful features of Maximo Spatial 9 across both Mobile and Desktop platforms.

Content: This interactive session will cover core functionalities such as spatial data integration, advanced spatial analysis, & more.

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Making Mobile Make Sense

Clint Kinstle - Southern Power Company

Purpose: Southern Power Company (SPC) operates 52 power generation facilities, including fossil, renewable, and battery storage sites. In the spring of 2025, we transitioned to MAS8 and moved from our previous mobile application to Maximo Mobile. However, we quickly encountered challenges with Maximo Mobile, particularly when it came to recording quick condition observations on numerous assets, which is a common task during our operational shift rounds. The popup side window in Maximo Mobile proved cumbersome, making it difficult for users to view the provided information and requiring additional clicks to record observations. After providing feedback to IBM, they agreed to collaborate with SPC to improve the user experience of the mobile application.

Content: Our primary goal was to ensure that users could record observations as swiftly as they made them. The key to our success was bypassing the Asset and going directly to the Condition Monitoring Point, which enabled us to create a continuous list of CMPs and eliminate the side popup window. This presentation will provide valuable insights into our journey, the challenges we faced, and the innovative solutions we implemented to enhance the user experience with Maximo Mobile. Our primary goal was to ensure that users could record observations as swiftly as they made them. The key to our success was bypassing the Asset and going directly to the Condition Monitoring Point, which enabled us to create a continuous list of CMPs and eliminate the side popup window.

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SCOUT - Material Tracking App

Charlene Baker & Nicholas Bryan - Duke Energy

Purpose: In a constantly changing supply chain environment, utility crews lacked confidence their material would be ready in time for work start dates. "Where is my material?" is the question that summarized their struggle. While trying to address the supply chain, Duke developed a clearer window into it for our crews.

Content: SCOUT shows the status of every item tied to jobs in a clear, concise, and mobile-friendly platform allowing Transmission and Distribution to effectively plan work, start jobs timely, and deliver for our rate-paying customers. SCOUT accomplishes this by utilizing Maximo data to capture new material statuses from the time material is reserved in Maximo until it is delivered to the crews' requested destination.

DAY 1 - TUES, SEPT 16

AFTERNOON 2ND BREAKOUT SESSIONS 2:45-4:00

15



MAS and Automation

Thomas Welsh - Evergy

Purpose: This presentation discusses Evergy's development and implementation of an automated process for Maximo migrations, which has significantly reduced manual work and accelerated our business value delivery. Maximo configuration and customization migrations are fully automated for various business scenarios, including structural and non-structural changes. This automation significantly reduces manual work for migration managers, enables artifact tracking, and fosters transparency within development and support teams regarding system changes. It also enhances the efficiency of the change management process by automating change request creation, also allowing even emergency change requests to be deployed quickly.

Content: This automation supports both explicit and implicit deployment orders for Maximo artifacts, respecting their deployment sequence and including pre- and post-migration support. Detailed deployment reports are sent to relevant stakeholders, and associated JIRA, incidents, or change requests are updated to ensure accurate deployment time tracking. Our automation process has increased business value for users by boosting developer productivity, thereby accelerating production delivery rates. We will demonstrate the deployment of various business scenarios and configuration types of Maximo artifacts and showcase a live demo.

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Maximo 101: Maximo Job Plans

Clay Cook - MUWG

Purpose: The Maximo 101 Track of presentations is designed for those attendees who are evaluating Maximo and Maximo applications, new to Maximo, or have very little experience with Maximo. This interactive session is designed to offer high-level information on Maximo capability for Job Plans. We will look into the Maximo Job Plan application, understand what is needed to properly plan work, information required on Job Plans, and discuss where information comes from when it shows up on a Maximo work order. Lastly, we will discuss who is responsible to make sure that it all comes together to provide value to the business.

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How Duke Energy Leverages Telematics

Denise Hansen & Jonathan Phipps - Duke Energy

Purpose: Duke Energy has more than 10,000 vehicles and 4,000 non-motorized/off-road assets equipped with a telematics device. Duke Energy representatives will share details about their telematics journey. This discussion will focus on current integrations and how we are utilizing the data to improve productivity, operations, safety, and compliance.

Content: Topics included in the presentation include · Capturing odometer and hour meters, as well as PTO and Boom Out of Stow · Obtaining fault codes and generating work orders in Maximo · Integration with Maximo for proof of delivery · Sending data from Maximo to the telematics vendor dashboard · Real-time vehicle location · Improved driver safety, reduction of accidents, coaching and recognition · Use cases for vehicle electrification · Automated notifications · Reduced fuel costs · Use of Electronic DVIR's · Fuel and mileage data for IFTA reporting · Future use cases

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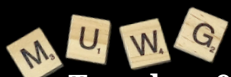
AI Has Entered the Control Room: Your Newest Teammate in Maximo

Luke Firth & Erin Buonomo - IBM

Purpose: AI has officially entered the control room - and it's here to work alongside your team, enhancing how things get done.

Content: In this session, we'll explore how AI is becoming a trusted teammate in Maximo—reshaping the way teams plan, execute, and optimize their work as traditional methods quickly become outdated. AI is stepping in to guide, collaborate, observe, and delegate—so your teams can move faster, make smarter decisions, and focus on what matters most. From day one, AI will enable users to be productive without formal training. It will collaborate by offering intelligent suggestions and simplifying tasks to help users get the job done. It will observe what humans can't—surfacing patterns, risks, and opportunities that drive better decisions. And it will delegate by automating both routine and complex tasks, freeing up time for high-value work. This isn't some far-off vision—it's already unfolding, and the time to start learning and adopting is now. AI capabilities are already being delivered in Maximo, and the way we work is changing fast.

AI is not just enhancing Maximo—it's redefining how your teams interact with it. This is a usability revolution, and it's unlocking a new era of productivity across the workforce. Join us to see what's possible and engage with us as we shape the future of asset management—together.



Tuesday, 9/16
5p-8:30p

**VENDOR
NIGHT**

Meet over 35 Maximo product and service Vendors and enjoy an open bar (5:00p) and a full buffet (5:30p). Please participate in the **Scrabble Challenge** & place your vote for **Best Vendor Swag**. How to participate & rules can be found in Guidebook under the 'Link' tab.

DAY 2 - WED, SEPT 17

GENERAL SESSIONS

7:00a-8:00a

CONTINENTAL BREAKFAST

8:00a-8:30a

Janie Mann
MUWG Management
Committee Chair

- Announcements
- MUWG Business Updates
- Agenda Updates

8:30a-9:00a

Terry Saunders
IBM

Michael Dawson
IBM

AI is Everywhere, What is the future of AI?

The current release of Maximo has AI embedded in Work Order Intelligence, Reliability FMEA Builder and Maximo Assistant.

This session will explore current capabilities and the potential for Utilities and Business Partners to add more specific skills in Maximo. We will also explore other use cases of AI being explored across utilities and discuss some current projects within utilities.

9:00a-9:30a

Karson Wynne
General Services
Administration

Bridging the Maximo Innovation Gap: Martec's Law and the Power of Change Agents

Explore how change agents can bridge the Maximo innovation gap. Learn to align people, processes, and technology to drive adoption, avoid disruption, and accelerate transformation across your organization.

This session unpacks Martec's Law—the widening divide between rapidly evolving technologies like Maximo and the slower pace of organizational change—and demonstrates how empowered individuals at every level can help close that gap. We'll show how to identify, support, and scale the impact of change agents. Walk away with actionable frameworks, tools like the "I, By" method, and a deeper understanding of how to foster agility and resilience in your Maximo implementation.

9:30a-10:00a

Erin Buonomo
IBM

Shaping the Future of Maximo: Your Feedback, Our Innovation

Maximo is evolving—and the user experience is at the heart of that transformation. In this session, get an inside look at how the Maximo Product Design team is reimagining the platform to help utility teams work more efficiently, intuitively, and effectively.

This isn't just about adding new features—it's about making Maximo easier to use, more responsive to your needs, and better aligned with how your teams actually work. This session will be covered in detail in the afternoon breakout session.

10:00a-10:45a

MORNING BREAK - refreshments provided

DAY 2 - WED, SEPT 17

MORNING BREAKOUT SESSIONS 10:45-12:00

IBM DEMO ROOM

Maximo for Nuclear Power and Power Generation | Maximo for Utilities (T&D) | Maximo Spatial

The demo room provides an open forum for your questions with answers from IBM Experts. There are no scheduled presentations, but please bring your questions.

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The MxLoader Playbook: Strategies for Data Cleanup and Migration Mastery

Zachary Johnson - U.S. Bureau of Reclamation

Purpose: Maintaining the accuracy and organization of core data in IBM Maximo is key for an effective maintenance management system, but it is even more crucial in preparation for the Bureau of Reclamation's migration to an enterprise asset management system in MAS 9. In preparation for this migration, efficiencies have been found using Bruno Portaluri's MxLoadertool. This presentation will share how Reclamation has leveraged MxLoader to streamline core data sanitization while also demonstrating its efficiency as a front-end data manipulation solution, making daunting tasks approachable.

Content: We will focus on MxLoader's capabilities and share real successes and failures using this powerful tool. MxLoader has enabled the bulk addition of new data, including but not limited to location classifications and specification attributes, while also addressing the comprehensive data cleanup efforts needed in support of Reclamation's ongoing reimplementation project, CARMA 2.0, to ensure a seamless transition to MAS 9. Key challenges encountered during this process included closing records that were functionally obsolete but were initially unable to accept the obsolete status. Additionally, we will perform a step-by-step investigation on how to rectify tens of thousands of purchase orders, which is essential for ensuring data accuracy in MAS 9. Join me as we explore the multifaceted capabilities of MxLoader, the obstacles faced throughout the process, and the strategies implemented to achieve a cleaner, more organized Maximo environment, thereby laying the groundwork for a successful migration and future growth with Reclamation's enterprise asset management system.

20

Maximo Accounting, CU Estimating and PowerPlan Integration

Lori Price - Duke Energy

Purpose: This session will present a successful implementation of Maximo from an accounting, compatible unit (CU) estimating, and PowerPlan integration perspective.

Content: Topics to be discussed will include how CU estimates inform labor and service cost allocation to capital specifics, blankets, and O&M as well as set cost of removal allocation rates in PowerPlan. The presentation will also include a brief overview of specific project setup and design and asbuilt estimates facilitated by a real-time web call to PowerPlan to validate and load the data. This information will set the stage for the criticality of the CU estimate and asbuilt data.

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Unlocking the Power of Maximo Spatial: What's New and What's Next

Thiago Iunes & Thiago Geraldi - IBM

Purpose: Join us for an in-depth look at the latest advancements in Maximo Spatial and discover how the enhanced features can elevate your asset management strategy. This session will showcase the redesigned, intuitive interface, now even more responsive across mobile and web environments, alongside key improvements that align with real-world operational needs.

Content: Whether you're a seasoned Spatial user or exploring its capabilities for the first time, you'll gain practical insights into maximizing your use of maps and spatial intelligence within MAS. We'll explore how these updates empower users to streamline workflows, enhance decision-making, and drive greater value from geographic data.

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Transforming Field Operations: AI Capabilities in IBM Maximo Mobile

João Souto Maior - IBM

Purpose: This session examines Artificial Intelligence (AI) capabilities within IBM Maximo Mobile, demonstrating how these innovations impact daily operations. We will explore Maximo Visual Inspections (MVI), showing its integration into the Inspections app for image analysis and into the Defects application.

Content: Attendees will learn how to leverage the AI capabilities from devices like speech-to-text and OCR to enable technicians to capture data hands-free, speeding work and improving data quality. Looking ahead, we will discuss future plans, including expanding MVI use cases across all Maximo Mobile applications, the ability to execute quality inspections from IBM Maximo Mobile, and introducing the Maximo Assistant. This assistant is an intuitive conversational AI that transforms how users interact with asset data, enabling natural language queries for real-time insights and workflow actions.

DAY 2 - WED, SEPT 17

MORNING BREAKOUT SESSIONS 10:45-12:00

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Project Material Tracker: Centralizing Visibility Across Edge Apps

Mark Anderlik & Destinie Prince - Oncor

Purpose: This session presents the application built in Maximo to consolidate Supply Chain and Project Engineering/Construction information into a single application in Maximo. By consolidating the data and providing a view for inventory personnel to view the respective WOs, POs, and reservations allocated to the project, we streamlined the management of materials and improved the visibility of project status information. This allows supply chain the ability to react to evolving material needs due to schedule changes and delays.

Content: This session will highlight our approach to building a robust project tracking application that connects Maximo to the warehouse management and transmission construction systems. Oncor's Inventory Management team will walk through the project lifecycle showcasing how centralizing the reservations and work orders associated to a given project improves their ability to effectively manage materials for multiple construction projects. The Capco team will discuss an overview of the custom application including the various tabs and their intended functionality as well as the multiple integrations required to consolidate this view into a single system. We will also showcase the extended functionality of managing reservations such as the ability for storekeepers to transfer them to various storerooms, add them to a different task, and even bulk delete.

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The Power of Using Maximo Metadata in Reporting

Annie Wooten & Samantha Salazar - LCRA

Purpose: Setting up classifications and specifications on assets and locations creates metadata that can unlock the ability to create detailed and creative KPIs and reporting.

Content: Transmission staff from the Lower Colorado River Authority will present how they leverage data points in Maximo to streamline the QA/QC process for reliability coordinators. Additionally, staff will demonstrate the utilization of digital test reports to capture critical data, enabling advanced reporting that verifies work completion in accordance with required maintenance intervals.

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Maximo 101: MAS Licensing

Jade Warren - Great River Energy & Rick Ulrich - MUWG

Purpose: The Maximo 101 Track of presentations is designed for those attendees who are evaluating Maximo and Maximo applications, new to Maximo, or have very little experience with Maximo. These sessions are designed to offer high-level information on Maximo capability, uses for various Maximo modules, what is required to operate in specific Maximo modules, and the value provided by them.

Content: Everyone loves AppPoints! With the MAS upgrade, Maximo customers are introduced to a whole new world of licensing. It's new, exciting, and maybe a little bit scary. This Maximo 101 session provides an overview of MAS licensing to enable customers to understand and optimize their AppPoints. Attendees will learn the differences between user types in MAS, how to best approach concurrent usage, how to analyze and report on AppPoint usage, opportunities to optimize your Manage security to reduce AppPoint usage and much more.

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Kinder Morgan Turns Up the Gas on Compliance

Pat Ulibarri & Jason Luke - Kinder Morgan

Purpose: To share Kinder Morgan's efforts to replace an outdated compliance system and integrate it with our existing Maximo platform, improving system reliability, operational efficiency, and compliance management.

Content: Why Maximo? Strategic alignment and platform synergy. **Terminology Deep Dive:** Speaking the same language.

Process Decisions: Building workflows that work. **Training and Rollout Decisions:** Develop training and rollout planning.

Tangible Benefits: Unified dashboards & centralized compliance data. **Key Obstacles:** Data migration complexities & nested project structures. **Challenges & Feedback:** Lessons learned from go-live and beyond

27



Using IBM watsonx to Evolve Maximo and Bring More Value to You

Stan Smith - IBM

Purpose: How Maximo Application Suite is harnessing the power of Generative AI to transform the user experience and processes you rely on.

Content: Maximo Application Suite introduced a significant usage of Generative AI via IBM watsonx in our most recent 9.1 release. This session will discuss the overall vision of how we will support the key roles and help you revolutionize the processes that are fundamental to asset lifecycle management. This technology will be a benefit to all organizations and we will bring clarity on the value of embracing it.

12:00p-1:00p

LUNCH - A plated lunch to promote discussion among attendees.

DAY 2 - WED, SEPT 17

AFTERNOON 1ST BREAKOUT SESSIONS 1:00-2:15

IBM DEMO ROOM

Maximo Manage Work and Asset Management | Maximo Mobile - Work Orders, Inspections, Service Requests | Maximo Monitor and Health

The demo room provides an open forum for your questions with answers from IBM Experts. There are no scheduled presentations, but please bring your questions.

28

Shaping the Future of Maximo: Your Feedback, Our Innovation – Deep Dive

Erin Buonomo & Emily DiCesaro - IBM

Purpose: Maximo is evolving—and the user experience is at the heart of that transformation.

In this session, get an inside look at how the Maximo Product Design team is reimagining the platform to help utility teams work more efficiently, intuitively, and effectively. This isn't just about adding new features—it's about making Maximo easier to use, more responsive to your needs, and better aligned with how your teams actually work.

Content: Whether you're a Maximo admin, planner, technician, or team lead, this session will give you a clear view of how the platform is evolving to support your goals and make every interaction more seamless. Don't miss this opportunity to see what's next, share your voice, and help shape the future of Maximo—where your experience drives our innovation. We'll highlight the progress made, showing how your feedback has directly influenced upcoming releases. You'll see how we're refining workflows, simplifying interfaces, and improving usability to reduce friction and boost productivity across operations and maintenance teams. You'll also get an exclusive preview of what's coming next. From smarter navigation to AI-driven assistance, we're building a Maximo experience that empowers users from day one. And we want to hear from you. This session will include roundtable discussions focused on your experiences with Maximo's usability. Your insights will help us bring your voice back to the lab—fueling even more improvements in future releases.

29

Person Group Maintenance

Vijay Gumte & Wes Ellis - Vistra Corp.

Purpose: To outline the process of granting access to specific Person Groups for selected users, allowing them to manage and control the members of those authorized groups.

Content: This functionality enables super users to assign Person Group access rights to individual users for designated groups. By doing so, super users are empowered to control and manage membership within only those Person Groups they are authorized for—enhancing security, delegation, & operational efficiency without providing unrestricted access across all groups.

30

Maximo Field Service Management – Enabling FSM Across the Asset Lifecycle

Pedro Solfa Spadacini - IBM

Purpose: As part of the continued focus on enhancing User Experience within the Maximo Application Suite (MAS), this session demonstrates how Maximo delivers a comprehensive Field Service Management (FSM) solution. We will explore how the integration of Manage, Scheduler, Mobile, Spatial, and Optimizer components supports the full spectrum of FSM needs, enabling a seamless and effective field operations experience.

Content: This session provides a strategic overview of how Field Service Management fits into the broader context of Asset Lifecycle Management in MAS. We'll showcase real-world scenarios and deployment approaches that leverage Maximo's modular capabilities to plan, schedule, execute, and optimize field service work from start to finish.

31



Maximo Mobile Implementation Best Practices and Troubleshooting

Mike Sielian & Shane Howard - IBM

Purpose: The objective of the presentation is to help teams navigate the challenges of implementing a mobility solution for the first time and migrating to Maximo Mobile.

Content: The presenters will lead an open discussion covering topics such as how to set expectations for an organization that is new to mobility to how Maximo Mobile works internally so implementers can make informed choices and discuss tools and techniques for identifying and addressing performance bottlenecks or other issues implementing teams may encounter. We'll explore what Maximo Mobile is, as well as what Maximo Mobile is not, as we discuss implementation best practices. And then, we'll dive into the Maximo Mobile architecture and its interactions with Maximo Manage.

DAY 2 - WED, SEPT 17

AFTERNOON 1ST BREAKOUT SESSIONS 1:00-2:15

32 

Mobilizing Inventory Management: Successful Mobile Solution Implementation in the Utility Industry

Yolanda Trummel - BPU

Purpose: As utility organizations strive to modernize their operations and improve field efficiency, implementing a mobile solution for inventory management has become a critical step toward digital transformation. This presentation outlines a practical roadmap for successfully deploying mobile technology to enhance inventory accuracy, streamline warehouse processes, and empower field crews with real-time access to materials data.

Content: Drawing from lessons learned in utility environments, we'll explore key success factors including stakeholder engagement, system integration with platforms like IBM Maximo, change management, and training strategies. The session will highlight how mobile solutions can reduce manual data entry, minimize stock discrepancies, and support just-in-time inventory practices that are crucial for maintaining service reliability. Attendees will gain insight into: • Designing a mobile inventory solution that fits utility workflows • Overcoming implementation challenges unique to utility operations • Integrating mobile tools with enterprise asset management systems • Improving real-time visibility, tracking, and replenishment of inventory in the field and warehouse. This session is designed for utility professionals involved in supply chain, IT, and field operations who are seeking to boost inventory performance and support a mobile-first workforce.

33

From Dams to Data: Building a Strong Foundation with Location and Asset Hierarchies

Reuben Vidaurrazaga, Tyler Byrne & Travis Napolitan - U.S. Bureau of Reclamation

Purpose: Maximo location and asset hierarchies help organize and manage assets and locations in a logical manner, making it easier for users to navigate and understand the relationships between different assets and their physical locations. Well-structured hierarchies promote transparent maintenance management and data capture, effective planning and resource allocation, as well as streamlined reporting and analytics. This presentation will share how Reclamation, through its MAS 9 reimplementation project, has collaborated with Total Resource Management, Inc. to refine its location and asset hierarchies from 26 distinct, disparate sites to a vertically and horizontally integrated structure aimed to achieve standardization across Reclamation's critical power generation and water delivery portfolio.

Content: In this presentation, we'll delve into one significant aspect of Reclamation's transformative journey as we work to migrate to MAS 9. We'll set out with an introduction to Reclamation's history, highlighting its significance and dedication to managing water resources and infrastructure across the western United States. The presentation will touch on the evolution of the use of Maximo at Reclamation facilities through its enterprise asset management system, the Capital Asset and Resource Management Application (CARMA). From streamlining operations and maintenance to enhancing data integration and analytics capabilities, we'll highlight how this foundational realignment will propel Reclamation towards greater efficiency and effectiveness in all aspects of asset management. Reuben, Tyler and Travis will be assisted by Total Resource Management.

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Maximo 101: Preventative Maintenance

Clay Cook - MUWG

Purpose: The Maximo 101 Track of presentations is designed for those attendees who are evaluating Maximo, new to Maximo, or have very little experience with Maximo. This interactive session will take a high-level look into the Maximo PM module exploring all of functionality that the application has to offer. Further discussion will include how PM information is tied to other Maximo modules to provide the necessary information to make educated business decisions for improved organizational success.

35 

Slaying the NERC dragon -- Transmission Facility Ratings in Maximo

Chris Lahr & Jade Warren - Great River Energy (GRE)

Purpose: Regulatory compliance is essential...and it is challenging! New regulations require electric transmission utilities to calculate and report maximum ratings for their facilities to the federal government across a broad spectrum of temperatures and dimensions. GRE uses Maximo to manage its transmission facility records, relationships to assets, & to calculate ratings.

Content: This session will provide business process context & will demonstrate the Maximo solution for facility ratings. Topics include how Maximo can support targeted use cases for asset data, including satisfying regulatory requirements, how Maximo scripting can be used to enable business requirements & how Maximo can present meaningful visualizations of complex data sets.

36 

AI-Powered Work Order Intelligence

Abhinav Agastya & Francisco Coelho - IBM

Purpose: Poorly structured or incomplete work orders often slow down maintenance, reduce fix accuracy, and frustrate planners and technicians. In this session, we'll explore how utilities can apply AI-driven intelligence to streamline, standardize, and strengthen their work order process end-to-end using capabilities already available in Maximo Application Suite.

Content: The session showcases two powerful and complementary tools: 1. Work Order Similarity — Automatically finds and groups related historical WOs to speed up troubleshooting, improve ticket close rates, and reduce duplicate effort. 2. AI Multi-Classifer for Problem Codes — Uses WatsonX-trained models to recommend accurate problem codes from short or long descriptions, improving data quality and reducing time spent on manual categorization. Attendees will learn how to: • Detect recurring asset failures through similarity clustering • Reduce rework, improve work grouping, and enhance workforce training insights • Combine both AI tools to optimize maintenance triage and estimation. By improving the quality, speed, and consistency of work order data, these capabilities enable utilities to move from reactive to proactive asset management — supporting the conference theme of Maximizing Sustainability and Efficiency with Maximo.

2:15p-2:45p

AFTERNOON BREAK - refreshments provided

DAY 2 - WED, SEPT 17

AFTERNOON 2ND BREAKOUT SESSIONS 2:45-4:00

IBM DEMO ROOM

Maximo Health, Safety & Environment | Reliability Strategies

The demo room provides an open forum for your questions with answers from IBM Experts. There are no scheduled presentations, but please bring your questions.

37

Achieve RCM results for less effort with Maximo Reliability Strategies and the Reliability Strategy Library

Derek Valine - IBM

Purpose: Reliability Centered Maintenance (RCM) is a proven and accepted process for driving improvements in equipment reliability and maintenance costs through development of effective maintenance practices; however, many organizations are not able to achieve these benefits because they are simply constrained by their ability to perform RCM.

Content: Learn how Reliability Strategies addresses this issue through leveraging the Reliability Strategies Library and Generative AI while providing for a continuous improvement loop to quickly adjust asset strategies based on performance.

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Spatial and Operational Synergy: Enabling Real-Time Situational Awareness for Modern Utilities

Alizera Parhami - DC Water

Purpose: For utilities, achieving real-time situational awareness is the ultimate goal, one that hinges on the much-desired seamless integration of IBM Maximo and Esri ArcGIS. This session reveals how DC Water made this ambition a reality, creating a foundational blueprint for modern utility operations. We will demonstrate how this powers a robust, map-centric Field Mobility solution and a resilient, unified Event/Emergency Management System that delivers unparalleled command center visibility.

Content: This session will specifically highlight how this integration elevated the role of IBM Maximo, transforming it from a powerful asset management system into the single source of truth for all enterprise operations. Discover the robust architecture that unlocks the full potential of your Maximo investment, eliminates data silos, and empowers crews by fusing spatial data with real-time operational intelligence from SCADA and IoT systems. We will showcase how this transformation—which earned the 2023 Global Water Summit Award and CS Week's 2024 Best Innovation—is a proven reality that has created more resilient operations and maximized the value of the Maximo platform. Alireza will be assisted by Yujel Tepekoy, Layermark

39

Maximo at the Core of a Digitized Gas Utility Construction Process

Dennis W. Hammer - Montana-Dakota Utilities Group

Purpose: Follow the gas construction life cycle from project initiation and design to install and as-built through a fully integrated digital solution, with Maximo at core of it all!

Content: We'll share our journey of building a fully digital electronic work management system. The why and how behind:

- aligning disparate business processes across brands
- integrating over 10 enterprise applications (including customer web portals, GIS, Design Tools, ERP, data warehouse and reporting, Mobile, Field kits, etc.) and over 70 individual integrations between them.
- leveraging multiple Maximo applications including Compatible Units and Estimating, Permits, Assignments, Inventory.
- Providing core functionality such as construction mapping, material relieving, forms, work review, generated & approved as-builts. We'll also share a view into this heavily integrated and streamlined process along with lessons learned from the transformation to a digitized solution.

40



Maximo Mobile - Empowering Storeroom and Field Technicians

Vinicius Garmatz - IBM

Purpose: This session offers a comprehensive update on Maximo Mobile, a core component of the MAS entitlement designed to help daily operations for both field technicians and storeroom clerks. We'll explore the latest features and modules currently available, demonstrating how Maximo Mobile empowers these roles to execute their work more efficiently. Specifically, we'll highlight how storeroom clerks can leverage the platform to ensure the availability of spare parts and items, supporting field technicians in work order execution and providing accurate updates back to Maximo.

Content: Review on existing processes supported for work execution, inspections and inventory modules, as well as cover the last 9.1 features for Maximo Mobile around Mobile Platform and Field Service Management.

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The API Highway: Streamlined Supplier Setup in Maximo

Chris Nichols & Bart Hewitt - Oglethorpe Power Corporation

Purpose: Oglethorpe Power Corporation (OPC) leverages IBM Maximo for comprehensive asset, contract, and procurement management. Through experience we have found manual data entry, inconsistent documentation, and time-intensive follow-up has bottlenecked the vendor onboarding process. To address these challenges, OPC piloted Vendor Hub with P2Insight. Vendor Hub is a secure, web-based portal that seamlessly integrates with Maximo to automate vendor registration, questionnaire capture, and document submission. Contract agents simply generate and share a unique link, enabling vendors to create a Vendor Hub account, complete custom compliance and eligibility questionnaires, and upload the required files. Upon submission by the vendor, Vendor Hub's API directly populates Maximo's vendor master and contract records, eliminating duplicate entry, accelerating setup, and ensuring data accuracy. In our implementation at OPC, Vendor Hub provides real-time visibility into renewal dates and compliance status. This empowers procurement and risk teams to proactively manage expirations and audit readiness. This presentation will detail our inspiration, design process, technical integration steps, configuration of the dynamic questionnaires, and the measurable business results.

Content: Attendees will gain actionable insights into how we deployed Vendor Hub to transform vendor lifecycle management, optimize resource allocation, and harness Maximo-driven data for strategic decision-making.

DAY 2 - WED, SEPT 17

AFTERNOON 2ND BREAKOUT SESSIONS 2:45-4:00

42 

Route Optimization into Field Service with Maximo Spatial and Scheduler Integration André Marcelino & Thiago Lunes - IBM

Purpose: Optimize field service management and extend dispatching capabilities for efficient technician routing by leveraging Maximo Spatial and Scheduler integration to enhance asset management workflows through map visualization and analysis.

Content: This session will explore and guide through a comprehensive demonstration on how to unlock the full potential of route optimization and learn how to seamlessly integrate and streamline workflows for improved decision-making.

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Maximo 101: The Purchase Requisition Application Destinie Prince - Oncor & Yewande Marshall - Southern Company

Maximo 101 presentations are designed for those attendees who are evaluating Maximo and Maximo applications, new to Maximo, or have very little experience with Maximo. These sessions are designed to offer high-level information on Maximo capability, uses for various Maximo modules, what is required to operate in specific Maximo modules, and the value provided by them. This interactive session will take a high-level look into the Maximo Purchase Requisition application. Discussions will include various definitions of what the applications are, what they are used for, what information is needed in them, and how to leverage both applications into other areas of Maximo. This session will include demonstrations within Maximo and an interactive question and answer. This will allow businesses to provide the necessary information to make educated business decisions for improved organizational success.

44

Help Attendees Understand the Key Elements of an Asset Database, Built in Maximo and How it is Critical to Their EAM Program Michael Stackhouse - Con Edison of New York

Purpose: EAM is not possible without the “A”, assets. A well designed and built asset database is pivotal to the goals of an EAM program. At Con Edison of New York, we have been growing and shaping our asset database for 25 years, adding assets of various types from numerous business units, with varied EAM requirements.

Content: This presentation will discuss what we have built and why. We will connect our asset onboarding process to the end goals of the enterprise, in an effort to help the audience see how they may maximize this foundational element of their program. Shaun will be assisted by Bob Fyke, Parsons Corporation

45 

Role of AI Agents in Renewable Asset Lifecycle Management Godson (Goody) Richard - IBM

Purpose: This presentation, tailored for renewable asset owners and managers, explores the futuristic role of AI agents integrated with Maximo Renewables in transforming lifecycle management. Delivered by a Brand Sales SME for Maximo Renewables, it addresses operational challenges leveraging AI agents.

Content: The session highlights three use cases which explores AI's power, forecasting failures and performance to extend asset life. Challenges like data integration and costs are addressed with Maximo's scalable SaaS solutions. By 2035, AI in renewables could reach a \$13B market, urging early adoption. Attendees will gain insights to implement Maximo's Renewables, preparing for a smart, sustainable future.

CLOSING SESSION & REMARKS

4:00p-4:30p

Please use Guidebook App to complete the Conference Evaluation to be eligible to win door prizes. Then, make your way the closing session. **Must be present to win a prize!**

DAY 3 - THURS, SEPT 18

OPTIONAL TRAINING & MEETINGS

TRAINING & CERT PROGRAMS 8:00A-3:00P

ADDITIONAL FEE (\$395) & REGISTRATION REQUIRED

BREAKFAST 7:00A-8:00A | LUNCH 12:00P-1:00P

Maximo Asset Management Training for Managers, Engineers & Supervisors

Instructor: Clay Cook

Planner Scheduler Certification - Level 1

Instructor: Rick Ulrich

Planner Scheduler Certification - Level 2

Instructor: Matt Midas

Compatible Unit Training

Instructor: Bill Holt

- "Hands-On Lab" – This training will cover the setup requirements to enable the use of CU including a review of Account/Asset Codes and their importance on an estimate. This will be hands-on (bring a laptop) training and participants will create CUs and CU Estimates. Best practice will be discussed with a focus on basic CU functionality. Participants will accept the CU Estimates on to work orders.

MAS 8 Supply Chain Overview

Instructor: Amy Tatum

- "Hands On Lab" (bring your laptop) using MAS, including other functionality which is now in MAS such as count books and the Supply Chain Maximo Mobile Applications.

Maximo for Business Process Support & Automation

Instructor: Jade Warren

- This training empowers attendees to leverage Maximo's configuration tools to effectively support key business processes. We will explore capabilities including database configuration, application designer, escalations & scripting, and more. You will gain an understanding of Maximo's ability to automate and support your business processes – you will learn not only WHAT Maximo can do, but also HOW you can leverage those capabilities to enhance your Maximo implementation.

PARTNER MEETINGS

REGISTRATION REQUIRED | MEALS NOT PROVIDED

IBM Practical Training on Using Maximo Spatial

- 8:30a-11:30a
- Enable participants to effectively use Maximo Spatial, covering all stages of integration with ArcGIS. Participants will learn everything from creating a Webmap to synchronizing real-time data, with a strong emphasis on utilizing maps in Maximo Mobile. The course will also introduce the latest features and functionalities of Maximo Spatial, highlighting their value for daily operations.
- For a detailed agenda or to attend, please email Thiago Geraldi - tgeraldi@ibm.com

IBM Maximo Nuclear Power Development

- 9:00a-11:00a
- To attend, please email Derek Valine - derek.valine@ibm.com

THANK YOU!



MUWG
MAXIMO UTILITY WORKING GROUP

Visit MUWG.org for more information about
the MUWG organization.

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