

# MUWG FALL CONFERENCE BLOOMINGTON, MN OCTOBER, 12-15



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**HOSTED BY:**



**MAXIMO UNLOCKED:  
TURNING A SYSTEM  
OF RECORD INTO A  
PLATFORM FOR  
INNOVATION**



**MUWG**  
MAXIMO UTILITY WORKING GROUP

# GREETINGS FROM MUWG!

The MUWG Management Committee invites you to our upcoming conference in the city of Bloomington, Minnesota hosted by Great River Energy. We're excited to bring together a community of Maximo practitioners, leaders, innovators, and first-time attendees for a conference designed to educate, connect, and inspire. You can expect:

- **Engaging keynotes** that explore the real impact of AI and intelligent systems
- **Real-world case studies** from organizations pushing boundaries with Maximo
- **Interactive learning sessions** and technical deep dives for all experience levels
- **Outstanding networking opportunities** with peers and industry experts

MUWG continues to be the trusted forum for Maximo users across utilities and beyond. Each conference is your opportunity to exchange ideas, discover solutions, and strengthen the community that makes MUWG exceptional. We encourage you to participate fully by asking questions, sharing your Maximo journey, and consider presenting at a future event. Your insights are what keep MUWG moving forward.

A sincere thank you to our sponsors, IBM, MUWG Board of Directors, MUWG Administration, and especially the MUWG Management Committee. Your dedicated support makes this event possible. So, pack your bags, bring your curiosity, and get ready to energize your Maximo journey. See you soon!

- MUWG Management Committee

## ***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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# MONDAY, OCTOBER 12

## PRE-CONFERENCE ACTIVITIES

### IBM Maximo Location Based Service Development Partner Meeting

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

### Preconference Networking Event - Mississippi River Scenic Cruise

11a-2:30p | Meet in Doubletree Lobby at 10:45a for chartered transportation to event.



Join fellow attendees for an optional pre-conference networking activity aboard the elegant Minneapolis Queen. Enjoy a relaxing and scenic cruise along the beautiful Mississippi River through historic downtown Minneapolis while connecting with colleagues and new friends before the conference begins.

Departing from Bohemian Flats Park, this unforgettable river experience combines stunning city views, rich local history, and delicious dining aboard an authentic paddle-wheeler. Lunch and 2 drink tickets included!

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 Bloomington!** 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:



The asset  
management journey.  
Streamlined.

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 - TUESDAY, OCTOBER 13

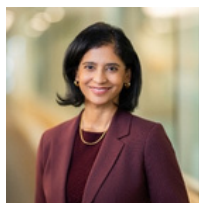
## GENERAL SESSIONS

7:00a-8:00a

CONTINENTAL BREAKFAST

### Opening Remarks

MUWG Management Committee

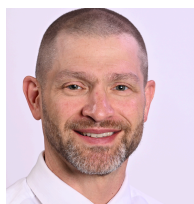


### The Modern Utility: Adapting Through Innovation

Priti Patel - Vice President & Chief Transmission Officer - Great River Energy

As the electric utility industry continues to evolve, organizations must balance reliability, affordability, and resiliency while navigating increasing operational complexity. This session explores how Great River Energy is adapting to these challenges by fostering a culture of innovation, empowering employees, and leveraging Maximo as a platform to transform ideas into solutions that improve the way work is done and value is delivered to members.

8:00a-10:00a



### Facility Ratings: How Regulatory Standards Drove Innovation at Great River Energy

Tim Mickelson, Principal Engineer - Great River Energy

Regulatory requirements can often be viewed as a challenge, but at Great River Energy they became a catalyst for innovation. This session explores how GRE leveraged Maximo to evolve its facility ratings program, improving data management, business processes, and compliance while creating lasting value across the organization.



### IBM Maximo Application Suite – Product Update & Roadmap Overview

Stan Smith, IBM Program Director Maximo Product Management

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

*Sponsored By:*

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!

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

12:00p-1:00p

LUNCH - A plated lunch to promote discussion among attendees.

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**TRINMAX**

# DAY 1 - TUESDAY, OCTOBER 13

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

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

  
AI - Artificial  
Intelligence

  
Information  
Technology

  
Mobility

  
Power  
Generation

  
Supply  
Chain

  
Telecom

  
Transmission  
& Distribution

  
Water /  
Wastewater  
& Pipelines

  
Maximo 101  
(No Kick-Off  
Session)

### 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 aggressively expanded capabilities while addressing time to value. This session will talk about recent updates and our plans going forward for all aspects of asset lifecycle and performance management including manage/EAM, mobility, scheduling and dispatching, Generative AI, asset health, vegetation management, renewables and other critical asset classes, industry driven functionality, facility management, and modernized user experiences.

## 2

#### Building a Common Safety Mindset: NYPA's SHIPPPS Work Planning and Execution Model Edward Peters - New York Power Authority

**Purpose:** SHIPPPS – Scope, Hazards, Information, Procedure, Protection, PPE, and Stop – serves as a common framework for identifying and communicating critical work elements from initial planning through field execution. This presentation will provide an overview of SHIPPPS, a developing safety and work planning/execution mental model being implemented across the NYPA organization to create stronger quality alignment between job safety planning, preparation, job briefing, and execution of work.

**Content:** The presentation will focus on the process of SHIPPPS and on its integration into work management processes, including the use of Maximo to support work planning activities and capture key safety and execution considerations within job plans.

## 3



#### Maximo Utility SME Q&A — Ask. Connect. Learn. MUWG Management Committee & Staff - MUWG

**Purpose:** Have a Maximo question? Wondering how other utilities are tackling a challenge? Stop by and tap into the collective experience of the MUWG community!

**Content:** Visit with a MUWG team member to learn more about MUWG, ask your Maximo questions, and hear how other utilities are using Maximo in the real world.

Bring your questions—we'll bring the utility expertise

## 4



#### Our Maximo Mobility Journey: Lessons from the Field at Greater Cincinnati Water Works Kevin Linn & Ryan Eiding - Greater Cincinnati Water Works

**Purpose:** Greater Cincinnati Water Works shares its Maximo mobility journey: the drivers behind the move, the options we weighed, and the realities of rolling mobility out to a utility field workforce.

**Content:** We will cover what the solution needed to support, how online and offline scenarios shaped our decisions, and how mobility had to fit our existing Maximo environment. This is a candid, vendor-neutral look at the trade-offs behind a real implementation, leaving attendees with practical criteria for their organization's implementation.

# DAY 1 - TUESDAY, OCTOBER 13

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

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### Maximo Supply Chain Update

Thomas Knowles- IBM

**Purpose:** IBM led session which provides the supply chain user community with Maximo product updates in the supply chain areas (Inventory, Contracts, Purchasing and Invoicing).

**Content:** Sneak peek and review of new supply chain features planned for our upcoming releases. Help validate strategic direction and ensure our roadmap is bringing the right set of new supply chain features to market.

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### Maximo 101: Locations & Assets

Tom Press, APS & Serisha Boyette - NYPA

Maximo 101 presentations are designed for attendees who are evaluating Maximo, new to the platform, or have limited experience with Maximo applications. These sessions provide a high-level overview of Maximo capabilities, key modules, their business uses, and the value they deliver to organizations.

This interactive session will explore Locations & Assets, including what it is, how it is used, the information required within applications, and how application configurations can support broader Maximo business processes. Attendees will see live demonstrations, learn best practices, and participate in an interactive Q&A discussion. The session is intended to help organizations better understand Maximo functionality and make informed decisions that support operational efficiency and business success.

7

### Maximo Security Strategy & Efforts

Cole Funseth - Great River Energy

**Purpose:** The purpose of this session is to explain how user analysis, with a focus on security and licensing, supports a successful MAS 9 upgrade.

**Content:** This session attendees will learn how evaluating user roles, permissions, and access models helps reduce security risk, optimize licensing costs, and establish a clean and sustainable user framework in MAS 9.

8



### Standardizing the Solution and Reducing Complexity

Chris McAulay - Ameren

**Purpose:** Ameren implemented MAS9 for the 2000+ employees across Substation, Relay, Transmission, Electric Distribution and Gas in support of Ameren's 2.5 million Electric customers and 900,000 Gas customers.

**Content:** This program accomplished several goals which will be discussed in this presentation, including: Replacing Click FSE with Oracle Fusion Field Service, shifting FERC account derivation from Maximo 7.6 into PowerPlan, and reducing configuration and customization through standardization and using MAS9 out of the box. Chris will be assisted by Kyle McDonald and Samir Khalfoun, Accenture.

9



### AI in Maximo 9.2 and Beyond

Luke Firth - IBM

**Purpose:** IBM's AI product team leaders present what significant advancements came in 9.2, how best to put them to use in your organizations, and a first look at what's coming down the roadmap over the next year!

**Content:** Learn what's there, how to leverage it for what benefits, and see first-hand demos.

2:15p-2:45p

AFTERNOON BREAK - refreshments provided

# DAY 1 - TUESDAY, OCTOBER 13

## 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.

## 10

#### IT Portfolio Management in Maximo

Michelle Angelo - Great River Energy

**Purpose:** Many organizations struggle with IT project and change-request processes scattered across disconnected tools, email chains, and manually maintained reports. This session shows how Great River Energy used Maximo to streamline IT portfolio and RFC management through iterative prototyping, workflow automation, configurable interfaces, and integrated reporting. Attendees will gain practical ideas for reducing fragmentation, increasing adoption, and maximizing existing Maximo investments.

**Content:** Attendees will gain practical ideas for reducing fragmentation, increasing adoption, and maximizing existing Maximo investments.

## 11

#### Driving safer operations with Maximo for HSE

Stan Smith - IBM

**Purpose:** In this session, we will explore how Maximo for HSE empowers organizations to strengthen safety performance, improve compliance, and reduce operational risks through an integrated, data-driven approach to Health, Safety, and Environment management.

**Content:** We will introduce the core capabilities of the solution and the product's forward-looking roadmap.

## 12

#### How We Built an Asset Management Philosophy in Maximo: Combining Industry Best Practices with Real-World Utility Operations

Vanessa Davenport - Great River Energy

**Purpose:** This presentation outlines Great River Energy's approach to building a scalable Maximo asset management philosophy by aligning industry best practices with real-world utility operations. It highlights how core decisions around assets, locations, classifications, and hierarchies drive data quality, maintenance effectiveness, and system usability. Attendees will gain practical lessons on governance, standardization, and transitioning from legacy data to a sustainable enterprise model.

**Content:** Attendees will gain practical lessons on governance, standardization, and transitioning from legacy data to a sustainable enterprise model.

## 13



#### Maximo Mobile Implementation Best Practices and Troubleshooting

Rafael Teixeira - IBM

**Purpose:** The objective of this session is to help teams navigate the challenges of implementing a mobility solution for the first time as well as manage migrations to Maximo Mobile. There will be a focus on new capabilities for troubleshooting introduced in the 9.2 release.

**Content:** This is 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.

## 14



#### APS's Desktop Requisition Workflow Approvals with Maximo Mobile

Tom Press - APS

**Purpose:** Our DR solution is built with financial controls called Delegation of Authority "DoA" with approval workflows tied to the dollar amount for each DR. Prior to our project, the workflow approval assignments appeared in the authorized user's Start Center and needed to be completed on the desktop/laptop computer. Our Maximo Mobile solution showcases APS's partnership with IBM and how we are bringing the DR Workflow Assignment capability to Maximo Mobile and employee's mobile devices. We are giving employees an option to complete an assignment on a mobile device or desktop/laptop.

**Content:** Discussion includes an introduction to Arizona Public Service Company, an overview of APS's DR Solution in MAS 9.0, DoA security groups and workflows, agile project management and requirements design, proxy challenges and accessing Maximo environments and the APS and IBM partnership and our strategic mobility roadmap.

# DAY 1 - TUESDAY, OCTOBER 13

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

15



### Maximo 101: Transportation

Darcie McGinnis - AEP & Clay Cook - MUWG

**Purpose:** Maximo 101 presentations are designed for attendees who are evaluating Maximo, new to the platform, or have limited experience with Maximo applications. These sessions provide a high-level overview of Maximo capabilities, key modules, their business uses, and the value they deliver to organizations.

**Content:** This interactive session will explore Transportation, including what it is, how it is used, the information required within applications, and how application configurations can support broader Maximo business processes. Attendees will see live demonstrations, learn best practices, and participate in an interactive Q&A discussion. The session is intended to help organizations better understand Maximo functionality and make informed decisions that support operational efficiency and business success.

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### Open Session

**Purpose:**

**Content:**

17

### I am a Superuser?

Matthew Henning - Great River Energy

**Purpose:** You know when you get called the Maximo expert and quietly panic inside? We've all been there. But don't worry, we've got you.

**Content:** In this session we'll make sense of the layout, tackle troubleshooting (something is always broken and it's probably not your fault), and finish with super user tips so good people will start calling you the Maximo Expert when you use them. Come hungry, leave empowered. No cape required.\*

*\*We won't judge if you brought one*

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### AI and Data Integrity

John Hyland - APS

**Purpose:** APS has partnered with PWC to deploy an AI based solution to review data submitted by the business for a data load to identify any missing or incomplete data that could compromise the validity and actionability of the data in Maximo.

**Content:** An overview of a new agentic solution APS is deploying to ensure the quality of mass data loads meant to be scalable across Maximo Business Objects.

**VENDOR NIGHT**  
**ENGAGE & EARN!**

**TUES. 10/13 5:00-8:00P**

Have fun and meet over 30 Maximo product and service Vendors during VENDOR NIGHT! Enjoy an open bar & full buffet. Participate in the 'Scrabble' game by visiting each vendor for tiles to build your words. Then, remember to place your vote for the Best Vendor Swag Award. Details & rules can be found in Guidebook under the 'Link' tab.

# DAY 2 - WEDNESDAY, OCTOBER 14

## GENERAL SESSIONS

7:00a-8:00a

CONTINENTAL BREAKFAST

### Opening Remarks

MUWG Management Committee



### A Foundation for the Future: Great River Energy's Maximo 9 Upgrade

Ron Schmitz - Director, Information and Infrastructure Services

Great River Energy recently completed its transition to Maximo Application Suite (MAS) 9, modernizing a critical platform that supports asset management, operational excellence, and innovation across the organization. This session will discuss governance, organizational strategies, business outcomes, and lessons learned from the upgrade, along with insights into how GRE is leveraging Maximo as a foundation for future digital transformation and continuous improvement.

8:00a-10:00a



### From Users to Innovators: How Great River Energy Built a Maximo Culture

Chris Lahr - Manager, Asset Data Controls & Analytics

How do you transform Maximo from a system of record into a platform for innovation? This session shares GRE's journey in building a Maximo Core Team that evolved from user awareness and knowledge sharing into a strategic governance and decision-making body. Learn how this foundation enabled innovative business solutions supporting asset management, compliance, facility ratings, human performance, operator logging, and more.



### The Utility AI Imperative - Transforming Systems of Record to an Engine of Action

Luke Firth - IBM

Your Maximo environment holds decades of operational data, but simply documenting work is no longer enough to meet the growing pressures of aging infrastructure, extreme weather, rapid load growth, and retiring experts. Every utility must now close the gap between what their systems already know and what teams need to do next. We will examine how AI is reshaping reliability, maintenance, and field work by identifying asset risk earlier, improving work planning, and making hard-won institutional knowledge available at the point of work. Practical examples from across Maximo will bring to life the broader industry shift from passive records to intelligent execution.

10:00a-10:45a

MORNING BREAK - refreshments provided

*Sponsored By:*

# DAY 2 - WEDNESDAY, OCTOBER 14

## MORNING BREAKOUT SESSIONS 10:45-12:00

### IBM DEMO ROOM

#### Maximo for Nuclear Power | 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.

## 19



#### myExperience - Human and Organizational Performance in Maximo

Jacalynn Bentz & Chelsey Wildman - Great River Energy

**Purpose:** This presentation explores the development and implementation of a custom human & organizational performance tool integrated directly within the IBM Maximo suite.

**Content:** We will discuss the initial drivers for tracking human performance, our strategic decision to leverage the Maximo ecosystem for this solution, and the critical enterprise-level lessons learned from two years of real-world application.

## 20



#### Maximo Utility SME Q&A — Ask. Connect. Learn.

MUWG Management Committee & Staff - MUWG

**Purpose:** Have a Maximo question? Wondering how other utilities are tackling a challenge? Stop by and tap into the collective experience of the MUWG community!

**Content:** Visit with a MUWG team member to learn more about MUWG, ask your Maximo questions, and hear how other utilities are using Maximo in the real world.

Bring your questions—we'll bring the utility expertise

## 21

#### Enhancing Integration at Bruce Power: Keeping Maximo and P6 in Sync

Courtney Diebel & Melissa Fedorchuk - Bruce Power

**Purpose:** This presentation highlights how Bruce Power enhanced scheduling through improved integration between Maximo and Primavera P6. The solution keeps work orders, tasks, clearances, status updates, and scheduling changes synchronized across both systems.

**Content:** The session will cover key process improvements, benefits such as reduced manual effort and improved visibility, and insights from testing, rollout, and lessons learned. Courtney and Melissa will be assisted by Mitchell Romanuik, NPX Innovations.

## 22



#### Mobility Q & A Session

MUWG & Rafael Teixeira, IBM

**Purpose:** Join an interactive Q&A session on Mobility featuring representatives from MUWG and IBM.

**Content:** This is an opportunity to hear real-world perspectives, ask questions, and gain practical insights into Maximo Mobile, best practices, and lessons learned from industry experts.

# DAY 2 - WEDNESDAY, OCTOBER 14

## MORNING BREAKOUT SESSIONS 10:45-12:00

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### How Inventory Optimization Keeps the Lights On and Water Flowing

Thomas Knowles - IBM

**Purpose:** Utilities continue to face pressure to maintain high availability of complex assets while having to balance financial performance. Unplanned downtime can significantly impact safety, production, cost and reputation. This leads them to often carry more stock than required tying up working capital and increasing the risk of obsolescence.

**Content:** The session will outline how the MIO uses advanced analytics and probabilistic modeling to determine optimum inventory levels.

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### Maximo 101: Preventive Maintenance

Shane Turner - Vistra

Maximo 101 presentations are designed for attendees who are evaluating Maximo, new to the platform, or have limited experience with Maximo applications. These sessions provide a high-level overview of Maximo capabilities, key modules, their business uses, and the value they deliver to organizations.

This interactive session will explore the Preventive Maintenance Application, including what it is, how it is used, the information required within applications, and how application configurations can support broader Maximo business processes. Attendees will see live demonstrations, learn best practices, and participate in an interactive Q&A discussion. The session is intended to help organizations better understand Maximo functionality and make informed decisions that support operational efficiency and business success.

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### Who Said This Would Be Easy - Maximo Integrations & Overcoming Technical Challenges

Steve Macdonald - Orion NZ Ltd.

**Purpose:** Orion New Zealand is an electricity distribution company in New Zealand. Owning \$1.6B NZD of horizontal infrastructure assets, Orion installs, replaces, and removes thousands of these assets each year. Until recently, Asset records were manually created in Maximo and GIS based on data captured on paper or electronic forms. This process was inefficient and increased the potential for errors and data integrity issues. A solution was developed to automate the Asset creation activity. This functionality improves efficiency, data availability and accuracy of operational and financial Asset and Location information, while keeping Maximo and GIS systems in sync.

**Content:** This session explores Orion's journey going from unconnected business systems to an integrated asset management model with the implementation of Maximo Application Suite with integrations to our new GIS system, new finance system and our operational SCADA. Attendees will leave with practical lessons, proven approaches, and considerations for planning, delivering, and sustaining integrated Maximo environments in increasingly complex and data-driven organizations. Steve will be assisted by Michael Cahir, Certus Digital.

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### What's new in MAS 9.2 for Maximo Scheduler & Optimizer

Pedro Solfa Spadacini - IBM

**Purpose:** Join this session to explore the latest enhancements in Maximo Scheduler and Optimizer, building on the foundation introduced in version 9.2.

**Content:** We will highlight key improvements across scheduling, planning, and dispatching workflows. Learn how recent updates enable better resource utilization, reduced travel time, and more efficient field operations.

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### Driving Reliability Excellence with AI-Powered Reliability Strategies and APM in Maximo

Ivan Mathy - IBM

**Purpose:** This session will showcase the enhancements to Reliability Strategies and APM applications in the MAS 9.2 release, featuring new and expanded AI-driven capabilities, automated generation of PMs and Job Plans, improved visualizations and deeper integration.

**Content:** Attendees will learn how these innovations streamline planning, standardize practices, and accelerate the transition from time-based to condition-based and risk-informed maintenance—reducing O&M costs and improving asset performance.

12:00p-1:00p

**LUNCH - A plated lunch to promote discussion among attendees.**

*Sponsored By:*

# DAY 2 - WEDNESDAY, OCTOBER 14

## 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.

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#### From Maximo Data to Decisions: Building Smarter Analytics & Dashboards

Jeromy Trujillo - Great River Energy

**Purpose:** This session will explore Great River Energy's approach to building reporting, analytics, and dashboard solutions in Maximo.

**Content:** Topics will include leveraging the Maximo REST API for data access, integrating with external analytics tools, and developing operational dashboards to support asset health and risk-based decision making. The presentation will also discuss current platform limitations, ongoing challenges, and potential paths forward to create more flexible, scalable, and dynamic analytics.

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#### Maximo PM Forecast and Work Week Management

Jennilee Messenger - Deriva Energy

**Purpose:** Deriva Energy (formally Duke Renewables) worked with P&RO Solutions to develop the capability to load PM Forecasts from Maximo. This feature allows for importing PM Forecasting into target work weeks, rescheduling PM Forecasts, and converting PM Forecasts into actual PMs, all from within the schedules managed by PaSTA. This process can be tailored and allows the company to determine whether or not to auto-schedule or to enable the user to manually place the PM Forecasts in the desired week(s).

**Content:** This presentation will discuss Deriva Energy's requirements, the process, and the partnership with P&RO Solutions to achieve the desired behaviors and outcomes.

30

#### Optimizing asset replacements with Maximo Asset Investment Planning in 9.2

Philippe Jette - IBM

**Purpose:** Learn how utilities can optimize their asset sustainment decisions to align with strategic objectives and resource constraints using Maximo Asset Investment Planning.

**Content:** This hands-on session will cover key concepts and demonstrate how to optimize a plan against it and review the results. We'll also go over what's new in 9.2 and where we're headed for 9.3 and beyond.

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#### Empowering the Frontline: Driving Operational Excellence with IBM Maximo Mobile and FSM

Rafael Teixeira - IBM

**Purpose:** Field technicians are the face of maintenance operations, and their ability to access accurate information and execute work efficiently directly impacts asset reliability and business performance.

**Content:** In this session, we will explore how IBM Maximo Field Service Management (FSM) and IBM Maximo Mobile work together to empower frontline workers with real-time access to work orders, asset information, inspections, and operational procedures.

# DAY 2 - WEDNESDAY, OCTOBER 14

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

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### Supply Chain “Ask the Experts” Destinie Prince - Oncor

**Purpose:** Bring your Maximo Supply Chain Questions to an open forum with other users and IBM.

**Content:** Users of Maximo will be able to ask questions and talk to other users of Maximo as well as IBM.

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### Maximo 101: Work Order Tracking Tom Press - APS & Serisha Boyett - New York Power Authority

Maximo 101 presentations are designed for attendees who are evaluating Maximo, new to the platform, or have limited experience with Maximo applications. These sessions provide a high-level overview of Maximo capabilities, key modules, their business uses, and the value they deliver to organizations.

This interactive session will explore the Work Order Tracking Application, including what it is, how it is used, the information required within applications, and how application configurations can support broader Maximo business processes. Attendees will see live demonstrations, learn best practices, and participate in an interactive Q&A discussion. The session is intended to help organizations better understand Maximo functionality and make informed decisions that support operational efficiency and business success.

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### Optimizing Facilities Space Management Tassie Justice - LCRA

**Purpose:** The LCRA Facilities team is pleased to share new and innovative strategies designed to enhance how we manage workspace utilization within Maximo. This session will highlight recent automations implemented to improve data accuracy, streamline processes, and ensure that information about vacant workspaces remains reliable and up to date.

**Content:** Join us to learn how these enhancements support more efficient space planning, reduce manual effort, and contribute to better overall facilities management across the organization.

35 

### Operator Logging Reimagined Ryan Frink - Great River Energy

**Purpose:** Great River Energy modernized mission-critical operator logging, outage coordination, clearances and related transmissions workflows by consolidating aging legacy systems into Maximo.

**Content:** This session explores the multi-year journey, including prototyping, architectural decisions, customization tradeoffs, performance tuning, user adoption, and lessons learned balancing usability, maintainability, and operational reliability while incrementally modernizing critical operations.

36 

### Unlocking AI-Driven Experiences with Maximo AI Service and Agentic Assistants Luke Firth - IBM

**Purpose:** Gain a high-level view of Maximo AI Service capabilities introduced in releases 9.1 and 9.2, showing how AI powers key use cases across query, summarization, and insights.

**Content:** Learn how to get started, explore deployment patterns, and understand key adoption considerations. Discover the architecture and how capabilities are configured and managed within ALM. See how the Agentic Assistant can be enabled and extended, and understand pricing and consumption to scale AI-driven experiences effectively.

2:15p-2:45p

AFTERNOON BREAK - refreshments provided

# DAY 2 - WEDNESDAY, OCTOBER 14

## 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

#### Closing the Loop: Facility Condition Assessment to Capital Project Execution

Stan Smith - IBM

**Purpose:** Discover how organizations use Maximo Real Estate & Facilities to transform Facility Condition Assessment data into prioritized capital projects.

**Content:** This session highlights how integrated data models and lifecycle insights enable smarter investment decisions, improved asset performance, and greater transparency across portfolios.

### 38



#### Utility Reliability in the Age of Aging Infrastructure and Workforce Change

Ivan Mathy - IBM

**Purpose:** Utilities are balancing reliability expectations with aging assets, constrained budgets, and a changing workforce.

**Content:** In this session, we will explore how Asset Performance Management in Maximo Application Suite 9.2 helps utilities move beyond reactive maintenance by connecting asset strategies, maintenance history, and condition data. We will discuss how prebuilt strategies, dashboards, and integrated workflows can preserve institutional knowledge and improve reliability.

### 39

#### IBM Maximo Field Service Management

Pedro Solfa Spadacini - IBM

**Purpose:** Maximo Field Service Management is a solution that helps organizations plan, schedule, dispatch, and execute field work efficiently. It connects people, processes, and data—ensuring the right work is done by the right resource, at the right time.

**Content:** This session provides a strategic overview of how Field Service Management fits into the broader Asset Lifecycle Management framework within MAS. Through real-world examples and proven deployment strategies, we'll demonstrate how Maximo's modular capabilities enable organizations to plan, schedule, execute, and optimize field service work from start to finish—delivering greater agility, productivity, and operational excellence. We will discuss current and upcoming capabilities.

### 40



#### Bridging Capital Project Silos: Mobile Asset Data Collection in the Field

Tony Strawhan - Metropolitan St. Louis Sewer District

**Purpose:** Metropolitan St. Louis Sewer District will share how they are leveraging Prometheus Mobile EAM for IBM Maximo to enable staff and contractors to collect asset information directly from the construction site. Teams can attach documentation, images, and field data in real time—encouraging cross-functional collaboration as equipment transitions from construction to ongoing operation and maintenance.

**Content:** In this session, we will discuss how this shift in field data gathering—coupled with intentional updates to the capital project process—led to significant downstream improvements in operability, maintenance planning, spare parts and inventory management, and warranty-related activities for newly commissioned assets. Tony will be assisted by Andrew Fellner, Prometheus Group.

### 41

#### Maximo 101 - The Purchase Order Application

Destinie Prince - Oncor & Yewande Marshall - Southern Company

Maximo 101 presentations are designed for attendees who are evaluating Maximo, new to the platform, or have limited experience with Maximo applications. These sessions provide a high-level overview of Maximo capabilities, key modules, their business uses, and the value they deliver to organizations.

This interactive session will explore the **Purchase Order Application**, including what it is, how it is used, the information required within applications, and how application configurations can support broader Maximo business processes. Attendees will see live demonstrations, learn best practices, and participate in an interactive Q&A discussion. The session is intended to help organizations better understand Maximo functionality and make informed decisions that support operational efficiency and business success.

# DAY 2 - WEDNESDAY, OCTOBER 14

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

42 

### Maximo Spatial 9.2: Building on 9.1 and What's Coming Next

Thiago Geraldi - IBM

**Purpose:** Explore how Maximo Spatial is evolving from 9.1 to 9.2 with new capabilities designed to enhance map-driven asset management across web and mobile experiences.

**Content:** This session covers the latest advancements in spatial visualization, automation, synchronization, field operations, and operational awareness. It offers a forward-looking roadmap with practical examples of how geographic intelligence is transforming enterprise asset management within MAS.

43 

### Maximo Transportation Q&A Session

Darcie McGinnis - AEP

**Purpose:** Join an interactive Q&A session on Maximo for Transportation featuring representatives from AEP, Duke Energy & IBM.

**Content:** This is an opportunity to hear real-world perspectives, ask questions, and gain practical insights into Maximo transportation implementation, best practices, and lessons learned from industry experts.

44

### Life After 7.6 - Great River Energy's Journey to MAS

Kirk Youngbauer - Great River Energy

**Purpose:** Great River Energy migrated multiple Maximo 7.6.x environments to internally hosted MAS 9.0/9.1 on OpenShift, supporting Transmission, Generation, and Corporate operations.

**Content:** This session covers deployment architecture, migration planning, legacy configuration transition, operational support, automation strategies, environment standardization, and lessons learned managing a large-scale on-premise MAS environment while improving maintainability, stability, and operational efficiency.

4:00p-4:30p

### CLOSING SESSION & REMARKS

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

# DAY 3 - THURSDAY, OCTOBER 15

## OPTIONAL TRAINING & CERTIFICATION PROGRAMS

**ADDITIONAL FEE (\$395) & REGISTRATION REQUIRED**  
**8:00A-3:00P | BREAKFAST 7:00A-8:00A | LUNCH 12:00P-1:00P**

### **Maximo Asset Management Training for Managers, Engineers & Supervisors | Instructor: Clay Cook**

- This training provides an intermediate-level view of how Maximo supports effective asset management from both a strategic and operational perspective. Designed for leaders and technical professionals who oversee asset-intensive operations, the session focuses on how Maximo enables better decision-making, governance, and performance across the asset lifecycle. Using practical examples, participants will learn how to interpret Maximo data and leverage the platform to improve asset management outcomes.

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### **Planner Scheduler Certification - Level 1 | Instructor: Rick Ulrich**

- This introductory training establishes the foundational concepts of planning and scheduling and how they support an overall asset and maintenance management program. Participants will learn how Maximo is used to plan work, manage resources, and support scheduling decisions using industry best practices. The session combines conceptual instruction, practical examples, and light hands-on activities.

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### **Planner Scheduler Certification - Level 2 | Instructor: Annie Wooten**

- This intermediate-level training builds on foundational planning concepts and focuses on using Maximo to develop high-quality, executable work plans. Participants will explore advanced planning techniques, preventive maintenance strategies, and corrective work planning using real-world examples. The session blends instructor-led demonstrations with hands-on exercises.

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### **Planner Scheduler Certification - Level 3 | Instructor: Matt Midas**

- This advanced training focuses on the execution and optimization of schedules for work that has been planned in Maximo. Participants will learn how to manage short- and long-range schedules, address interruptions and emergency work, and use scheduling metrics to improve performance. The session is scenario-driven and demonstration-based, emphasizing decision-making and best practices. *This level includes taking the MUWG Planner Scheduler Certification exam and requires prior attendance of at least one of the Level 1 or Level 2 Training classes.*

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### **MAS 9 Supply Chain Overview | Instructor: Amy Tatum**

- "Hand-On Lab" (bring your laptop) – This training provides an introductory to intermediate, task-oriented overview of Supply Chain functionality in Maximo Application Suite (MAS). The session walks through core supply chain processes and related capabilities now available within MAS, including inventory, purchasing, count books, and Supply Chain Mobile applications. Designed as a follow-along, hands-on lab, the training focuses on how common supply chain activities are performed in MAS and how they compare to legacy Maximo workflows.

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### **Maximo for Business Process Support & Automation | Instructor: Jade Warren**

- "Hand-On Lab" (bring your laptop) – This training introduces attendees to Maximo's configuration and automation capabilities and how they can be used to effectively support business processes across the platform. Taking a process-agnostic approach, the session focuses on practical tools and techniques that can be applied to any Maximo functional area, including work and asset management. Participants will learn how to enhance out-of-the-box functionality and implement business-specific use cases using standard Maximo tools.

# DAY 3 - THURSDAY, OCTOBER 15

## PARTNER MEETINGS

REGISTRATION REQUIRED  
MEALS NOT PROVIDED FOR PARTNER MEETINGS

### IBM Practical Training on Using Maximo Spatial

- 9:00a-11:00a
- 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

# THANK YOU!

Visit [MUWG.org](http://MUWG.org) for more information  
about the organization.



REVISED: SEPTEMBER 22, 2026