



UC23 | October 3-5, 2023

# CEO Welcome Remarks

Mark Simner, CEO - TMA Systems



## Mark Simner

CEO, TMA Systems

[Mark.simner@tmasystems.com](mailto:Mark.simner@tmasystems.com)

*Prior to joining TMA Systems Mark was COO and CFO of Silversmith Capital portfolio company Absorb Software, was CFO at TCV backed portfolio company Varsity Tutors (now listed on the Nasdaq as "Nerdy") and was also CFO of an American Express owned SaaS Company called Accertify. He has more than 20 years of experience in growing and scaling SaaS, technology and financial service companies globally and brings deep operational and strategic skills to his role as Chief Executive Officer at TMA Systems.*



1

Discover

2

Connect

3

Collaborate

# What You Can Expect

1

## Dynamic and Informative Sessions

- Round Tables
- Roadmap Sessions
- Client Recognition

2

## Information From Industry Experts and Peer Networking

- Walker Reynolds, President & Solutions Architect at 4.0 Solutions
- Ed Roshitsh, Newly appointed TMA Systems Board Member (former CEO of Brightly/Dude Solutions)

3

## Training & Hands-on Opportunities

- Engage with our trainers, consultants, customer success, and customer service personnel
- Get personalized, hands-on learning experience and build solutions to your issues here at conference



# Conference Overview



## Tuesday, Oct 3

Opening Session – TMA's  
CEO Mark Simner

Sessions and Solutions  
Zone 11am-4:45pm

Keynote Speaker – Walker  
Reynolds

Dinner and Concert 6:30-  
9pm - Cain's Ballroom



## Wednesday, Oct 4

Sessions and Solutions Zone  
9:30am-4:45pm

Keynote Speaker – Ed  
Roshitsh

Dinner and Casino Night 6:30-  
8:30pm

Promenade A-D

Door Prizes at Casino Night +  
UC25 Registration Giveaway!



## Thursday, Oct 5

Sessions and Solutions Zone  
9:30-4:45pm



# Solutions Zone



**Learn** Something about WebTMA that you didn't know.



**Solve** an existing problem by working 1:1 with our Professional Services Consultants.



**Build** a dashboard or other functionality in your production environment with assistance from our Professional Services Consultants.



**Network** with other WebTMA users on best practices.



# Customer Recognition



# Over 150 Clients Represented at UC23

Education

Corporate

Healthcare

Customer logos redacted

11 Clients  
30+ years  
with TMA

45 Clients  
20-30 years  
with TMA

57 Clients  
10-20 years  
with TMA

16 Clients  
5-10 years  
with TMA

16 Clients  
< Less years 5  
years with TMA



# Client Statistics

User Conference 2023 Attendees for the last 12 months

1

# of Work Orders Processed

4,835,058

2

# of Facilities Managed

9,510

3

# of Assets/Equipment Under Management

1,263,719

4

# of Users On the System

24,721

5

Average # of Years As A TMA  
Systems Client  
(from this audience)

16.57 yrs

## Product/Environment Breakdown

- 55% On-Premise
- 45% SaaS
- 69% on WebTMA5
- 31% on WebTMA7



# TMA Employee Recognition

A wireframe cube is positioned behind the title text. To the right of the title, there are two solid blue geometric shapes: a large trapezoidal prism in the upper right corner and a smaller cube in the lower right area.

# TMA Tenured Employees



Matt Sunday – 10  
Michael Martellacci - 10  
Joshua Yang – 11  
Anthony Frisco – 11  
Adam Deatherage - 12  
Emily Goss - 12  
Robert Allen Metcalf – 12  
Daniel Maddux – 13  
Jacob Mix - 13  
Derek Edwards – 14  
John Kurtzweil – 14



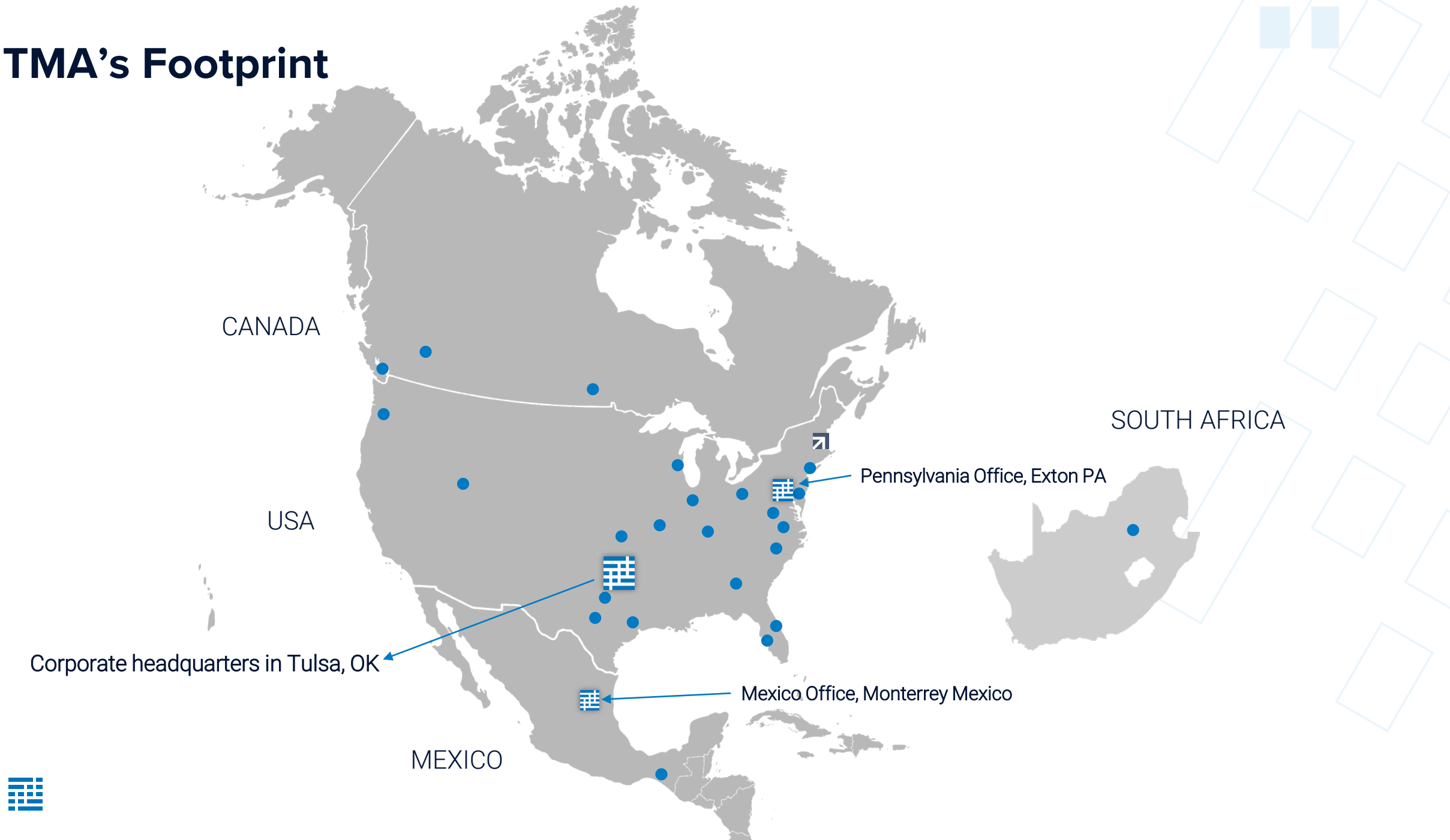
Wasique Ahmad - 15  
Tabor Ellison – 16  
Bill Musick - 16  
Cynthia Whitaker – 17  
Harry Kohal - 17  
Patrick Smith – 18  
Kathy Yu – 19  
Robert Efford – 19



Luis Pino – 21  
Jacob Leon – 22  
Michael McClain - 22  
Patricia Wade - 23  
Mike Koenig – 23  
Jenny Pino – 24  
Jose Luis Del Rio – 24  
Darren Brown – 25  
Stephen Volpone - 26



# TMA's Footprint



# Reliable. Innovative. Trusted.

Empowering facilities  
management teams with **powerful  
asset maintenance and  
management solutions**



# Pace of Change & Innovation

Abstract geometric shapes in various shades of blue, including a wireframe cube, a solid cube, and a tilted cube, scattered across the right side of the slide.

# Pace of Change



1,650+ clients worldwide  
(22 Languages)



100,000+ facilities



Client-driven solution provider  
with 430,000+ users



99%+  
customer satisfaction (CSAT)  
rating and low customer churn;  
NPS scores trending up



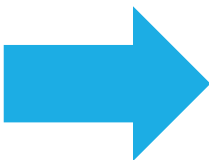
2X the number of employees  
since Silversmith investment  
w/average tenure of >8 yrs.



Building an inclusive, diverse working  
environment



2 Significant Acquisitions



# What The Acquisitions Mean

1

**Computerized Maintenance  
Management/Enterprise Asset  
Management**



2

**Calibration Management**



3

**Risk Management**



# Innovations of WebTMA



Moved to an Agile Development Methodology



Introduced GIS Capabilities



Introduced New PM Load Balancing



Migrated Hosting to Microsoft Azure



Introduced Service Request Portal & Requestor Login Improvements



Launched a New Mass Import Tool



IoT/Building Automation—Expanded our Integrations & Interfaces leveraging BACnet (OBEM and AIWX planned)



Improved Customer Surveys & Customer Sub-Domains



Introduced a New Business Intelligence & Reporting Tool



Introduced a New User Interface



Added Configurable Email Alert Rules & Inspection Findings



Introducing a New Mobile Offering



# Microsoft® Azure

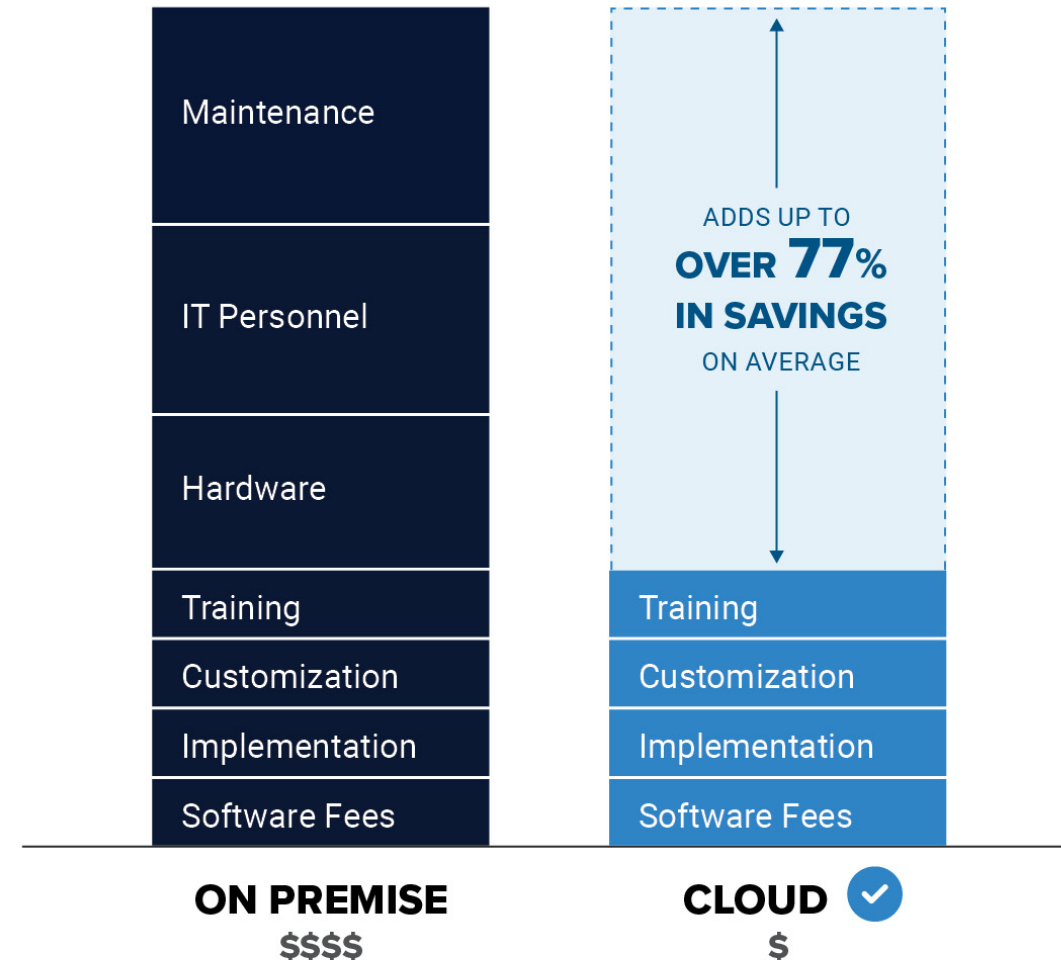
TMA is committed to providing a best-in-class SaaS hosting environment to our customers. We have completed the work on the production environment in Microsoft Azure and it is now available to all hosted customers.

- 99.8% uptime
- Top tier security and compliance via Azure
- TMA support to relieve in-house IT resources
- 4x faster fixes and automatic updates
- Replicated database for reporting and better system performance
- Implemented performance monitoring software for both the application and database
- Connectors for customers to bring a reporting tool of their own



# MAXIMIZE UPTIME AND SAVE ON COSTS

Discover the benefits of switching  
to WebTMA Cloud Hosting

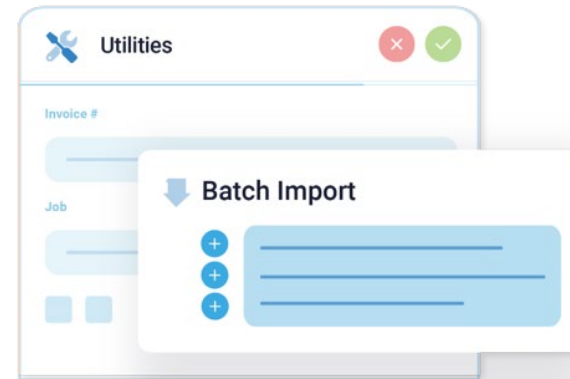


# GIS + Mass Import Now Part Of WebTMA Base/Plus

New



- Easy reordering of feature layers in GIS Map setup
- Creation of Work Orders directly from GIS Map View
- Display WO Browse Query Results on GIS Map
- *See GIS – Covered in What's New In WebTMA 7 - Wed 3:30 Promenade B*



CONTROL ID	ALTERNATE TAG #	MAKE NAME	BOMED TYPE	DEVICE TYPE	PARENT TAG #	FACILITY	BUILDING NAME	FLOOR CODE	AREA #
10000	20000	FLUKE	Defibrillators			Premier City Hospital	Main Hospital	11th Floor	100
10001	20000	FLUKE	Defibrillators	1000	10000	Premier City Hospital	Administration Center	11th Floor	101
10002	20000	FLUKE	Defibrillators		10000	Premier City Hospital	Business Office Building	11th Floor	102
10003	20000	FLUKE	Defibrillators	1000	10000	Premier City Hospital	Main Hospital	10th Floor	103
10004	20000	FLUKE	Defibrillators	1000	10000	Premier City Hospital	Main Hospital	10th Floor	104
10005	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Main Hospital	10th Floor	105
10006	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Main Hospital	11th Floor	106
10007	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Main Hospital	11th Floor	107
10008	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Main Hospital	10th Floor	108
10009	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Main Hospital	10th Floor	109

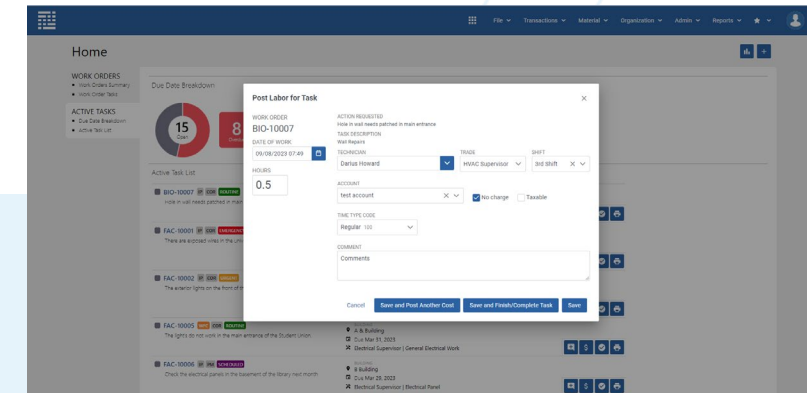
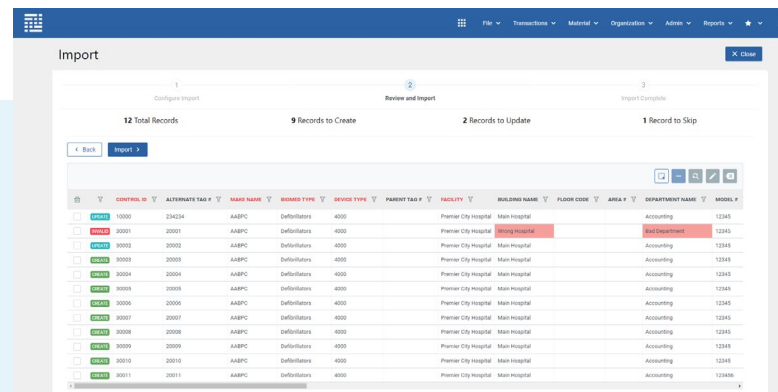
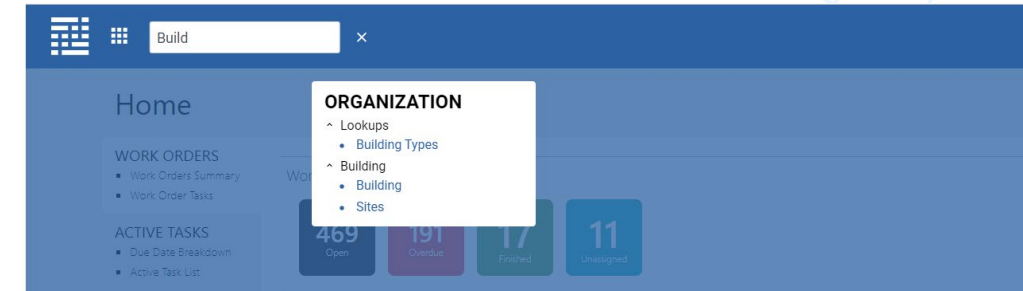
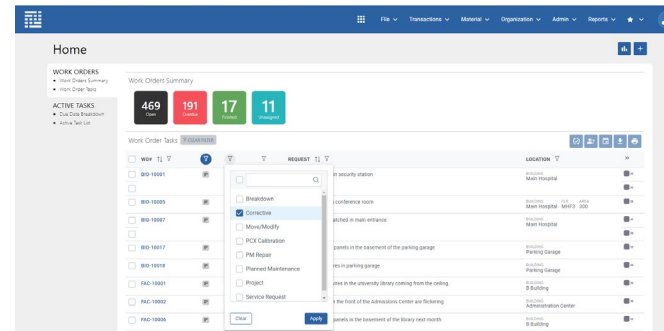
- Upload spreadsheets to an SFTP folder for automated data imports
- User-friendly interface for simple data updates within the tool
- Flags potential errors and allows inline corrections

Mass Import Sessions - Tues 11:00/Wed 3:30 Promenade D



# New UI – Landing Page

Released an enhanced, more efficient user interface resulting in fewer clicks, less scrolling, simplified menus and an on/off toggle for individual and group activation.



# WebTMA Event Scheduler

## One-Stop Solution for Event Management and Efficient Facility Use



### Manage Spaces, Resources & Services

Reserve the room(s) for your event, and also any resources or services that are required as well.



### Public & Private Calendars

Allow users to see the full master calendar internally and even display your public events on your website.



### Real-time Event Conflict Detection

Eliminate double booking issues and allow for the navigation of "conflicts" within the schedule in real-time.



### Multiple Locations

Manage events across multiple locations. Allow users to have access to the location(s) they need to manage.



### Customized Forms

The custom form-builder allows you to design and utilize online forms quickly and easily!



### Robust Reporting

Our numerous reporting options provide you the data you need to intentionally and effectively manage your events.



### Public Request Forms

Customized public event request forms to allow external sources the ability to request use of your facility.



### Customized Approval Logic

Set up multiple approval workflows to ensure your events follow the desired path of approvals.



### Various User Permissions

Give your users access to what you'd like them to see, approve, and manage.



# Recognition: Facility and Asset Management



**Capterra** Published: April 01, 2023

Average User Ratings for CMMS Products

	Overall	Functionality	Ease of Use	Value for Money	Customer Support
WebTMA (n = 13 reviews)	97	98	98	98	100
Asset Essentials (n = 25)	89	87	86	85	87
eMaint CMMS (n = 15)	93	91	87	77	92
Facilio (n = 10)	74	74	72	70	78
CMMS Category Average (n = 3,380)	90	88	88	88	89

**Capterra** Published: April 01, 2023

Average User Ratings for Facility Management Products

	Overall	Functionality	Ease of Use	Value for Money	Customer Support
WebTMA (n = 13 reviews)	97	98	98	98	100
Asset Essentials (n = 25)	89	87	86	85	87
Facilio (n = 10)	74	74	72	70	78
UpKeep (n = 51)	90	89	89	87	86
Facility Management Category Average (n = 4,305)	92	89	89	88	89

**Capterra** Published: April 01, 2023

Average User Ratings for Maintenance Management Products

	Overall	Functionality	Ease of Use	Value for Money	Customer Support
WebTMA (n = 13 reviews)	97	98	98	98	100
Asset Essentials (n = 25)	89	87	86	85	87
eMaint CMMS (n = 15)	93	91	87	77	92
UpKeep (n = 51)	90	89	89	87	86
Maintenance Management Category Average (n = 3,643)	90	87	88	87	88

*We Love Referrals!*



# Customer Satisfaction (CSAT) + Net Promoter Scores (NPS)

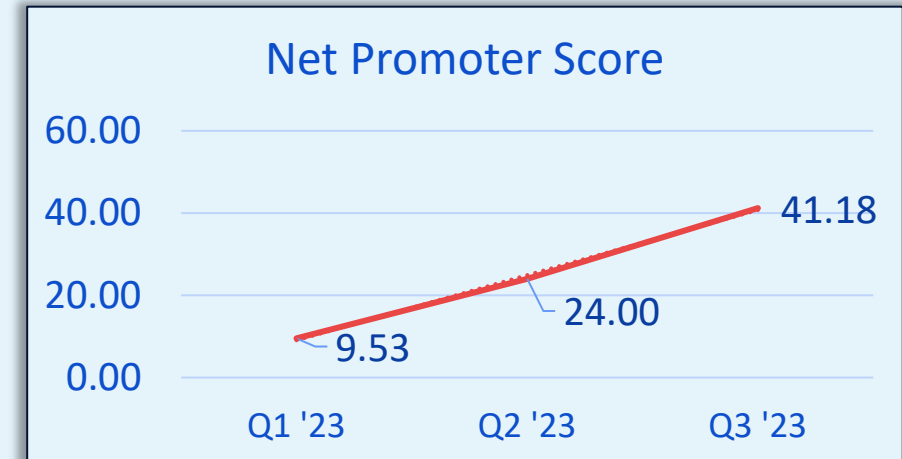
## CSAT (2023 YTD)

Total surveys submitted = 524

Total positive responses = 519

99.1%

## NPS Trend Q4 '22 – Q3 '23



# Service Differentiators

## WebTMA Administrative Services

A tool for existing administrators or a service to fill an organizational void. WebTMA Administrative Services offers the following:

- Business Intelligence
- Training
- User Management
- End-User Support

## Premium Support Services

Packages	Gold	Platinum	Diamond
Free WebTMA Upgrades	X	X	X
Normal Business Hour Support	X	X	X
Access to TMA User Group	X	X	X
Access to Video Training Library	X	X	X
Emergency After Hours Support	X	X	X
Dedicated Test Environment	Optional Purchase	X	X
Test Environment Annual Refreshes	Optional Purchase	4	12
Authorized Support Contacts	3	5	10
Dedicated Client Success Manager	N/A	X	X
Customized Client Training	Optional Purchase	10 Hours Annually	60 Hours Annually
Discount On Additional Training	N/A	10%	20%
Business Reviews	N/A	Annually	Quarterly



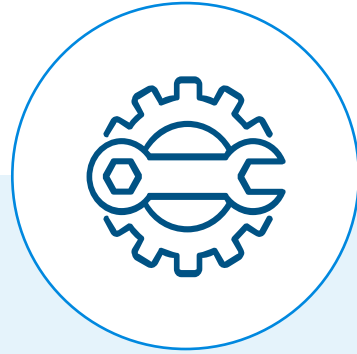
# Migration to WebTMA7 (Jan 1 roll out for on premise clients)

Thanks for your patience...



## Migration Plan

Developed a Best Practices Migration Plan.



## Develop Tools

Developed Tools & Scripts to Augment Migration.



## Test

Tested Tools & Scripts Internally and w/ Clients.



## Release

- 9 On-Premise Pilot Clients have moved to WebTMA7;
- 15 by the end of year



# 2024 Roadmap



# 2024 Roadmap Priorities

1

**New UI** – Expand new UI design concepts throughout the rest of WebTMA in 2024.

2

**mobile WebTMA** – Release newly designed mobile application with a focus on a simple interface appealing to Technicians.

3

**Analytics** – Expanding available stock dashboards/KPIs within our embedded BI offering.

4

**Mass Import Tool** – Extend tool to include all most common data points users would like to import/update.

5

**Asset Hierarchy** – Improved version of Total View with an intuitive tree view of Locations, Assets, and Sub-Assets.

6

**API Development** – Continue exposing new API endpoints as clients provide feedback on desired integration capabilities.

7

**AI and Machine Learning** – A particular area of focus for 2024 will be ways to incorporate AI tools and capabilities that can streamline customer workflows as well as machine learning capabilities to support clients in their progress towards Predictive Maintenance.



# User Conference 2025

Save the date: April 7-10, 2025 (Tentative)

# A special thank you

- Our Clients
- Partners
- Presenters
- Keynote and client speakers
- Our UC23 team
- Our broader team at TMA Systems





Note: To submit questions for the Executive Panel Round Table session, please respond to the push notification coming from Guidebook. The survey link can also be found in the Executive Panel session within Guidebook.

# Thank You.

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