



SOUTHERN PORTS
ALBANY BUNBURY ESPERANCE

Building a Clear and Audit-Ready Asset Management Framework

Lessons from Southern Ports' Journey to ISO 55001

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better  **AIM**
Better Asset & Information Management

Southern Ports Asset Management Challenge

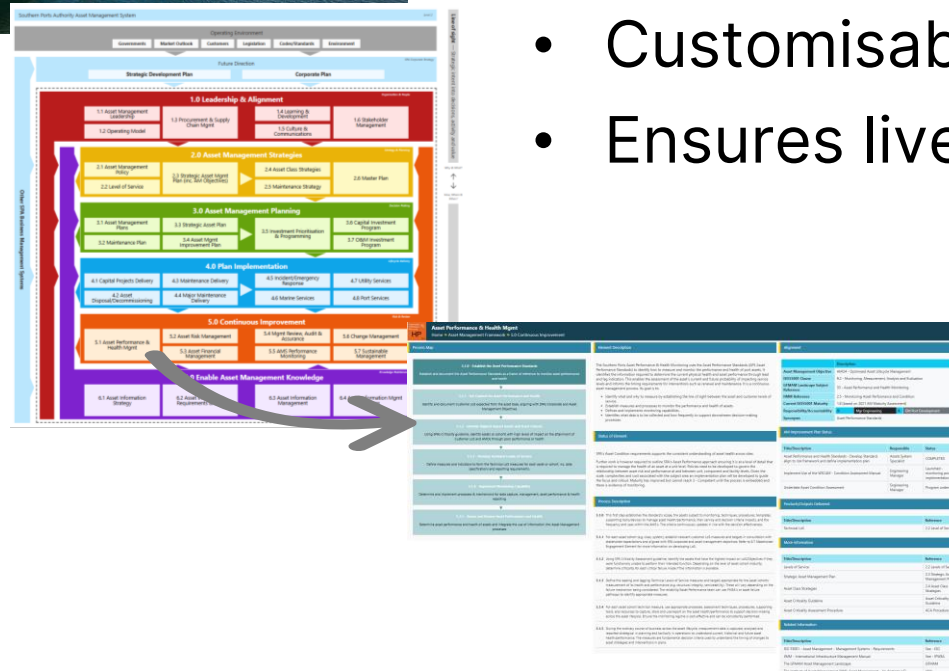
- Strategic driver from the board to achieve compliance
- CMMS implementation
- Digitisation of asset management
- Asset management governance
- Roles and responsibilities



Enter the Digital AMF – A Digital Enabler



- First, what is an AMF?
- Preconfigured structure, ready for quick adoption
- Customisable to suit organisational needs
- Ensures live updates and version control



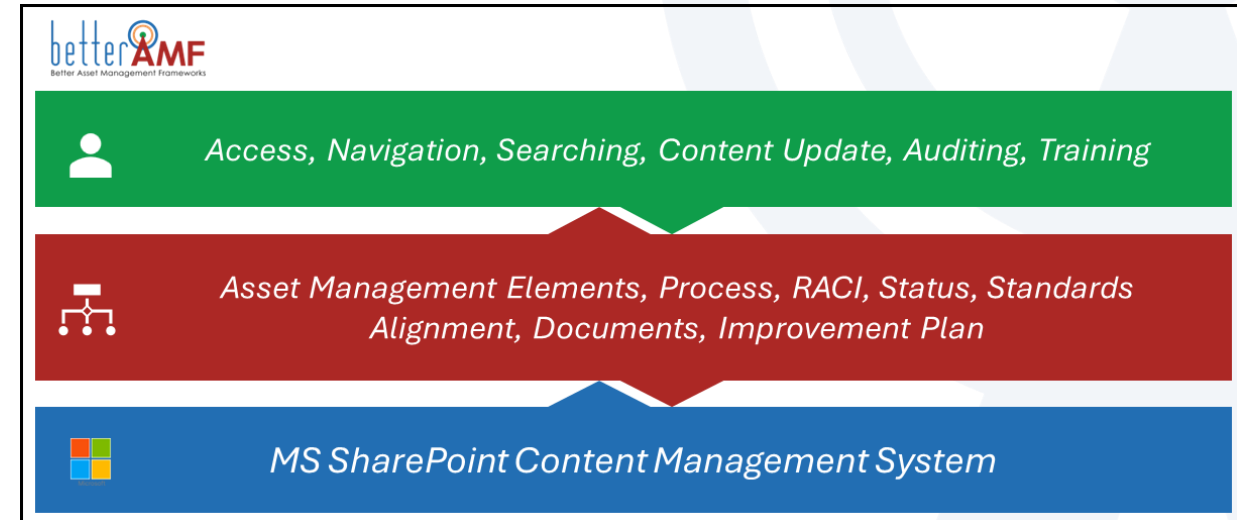
The Need for a Structured Approach

- Aligning asset management with ISO 55001
- Moving from static to a digital framework
- Creating a 'single source of truth', centralised Knowledge Management



What is the Digital AMF?

- A Structured Management System for Asset Management
- Built on Microsoft SharePoint for accessibility and easy deployment
- Houses all asset management elements, processes, and RACI matrices
- Enables real-time updates, version control, and searchability
- Preconfigured with asset management best practices but fully customisable to match Southern Ports' requirements



Implementation at Southern Ports

- Deployed in three months
- Hosted in SharePoint for easy access during implementation
- Strong stakeholder engagement ensured success
- Buy-in and complete improvement program was critical

Establish baseline digital AMF

Load betterAMF into a SharePoint environment. Alter to betterAMF match AMF requirements

Southern Ports Engagement

Engage and review documents to tailor AMF to Southern Ports requirements

RACI Assignment

Assign Roles and Responsibilities using AMF elements

Test and Deployment

Test, configure access and deploy framework for Southern Ports



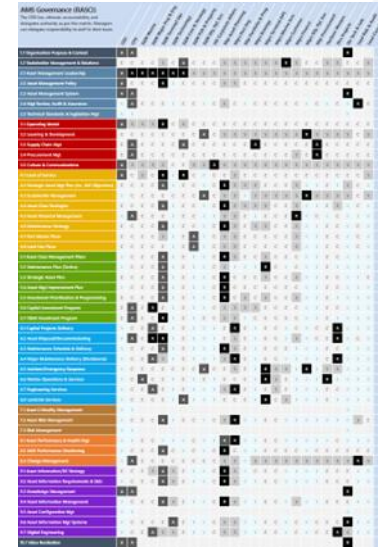
3 Month Timeline graphic showing key milestones



Key Benefits

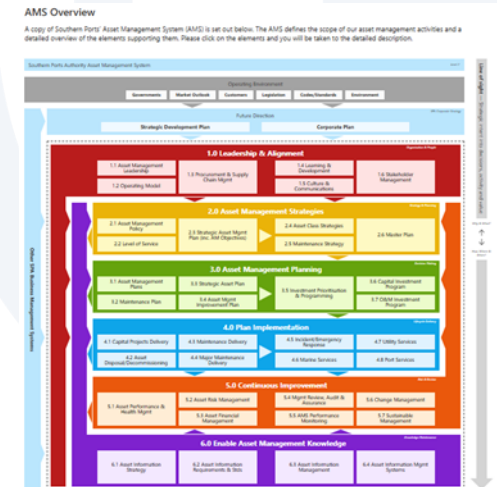
- Improved visibility of roles and accountabilities
- Audit-ready: Facilitated ISO 55001 certification
- Efficiency: Eliminated duplication and outdated documents
- Usability: Intuitive interface for all staff levels
- Enhances Asset Management Governance
- Helps new starters

Asset Management Elements on a page



RACI Assignment

Navigation



Asset Management Policy			
Home » Asset Management Framework » 2.0 Asset Management Strategies			
Process Map			
<div>2.1.0 - Establish the Asset Management Framework</div> <div>Establish and document the Asset Management Framework as a formal reference for the scope and set of coordinated asset management activities.</div> <div>2.1.1 - Establish Coordinated Business Objectives</div> <div>Consult with stakeholders to identify issues, challenges, opportunities and define changes to corporate objectives, service expectations and other business policies.</div> <div>2.1.2 - Establish Coordinated Business Objectives</div> <div>Consult with stakeholders to assess whether the Asset Management Policy needs revision given recent or forecast changes to the Asset Mgt System in the planning period.</div> <div>2.1.3 - Review Asset Management Policy</div> <div>Submit proposed new policy for review by the Strategic Asset Management Working Group. Implement feedback.</div> <div>2.1.4 - Implement Asset Management Policy</div> <div>Communicate updated Asset Policy. Implement change across AMS. Monitor effectiveness of AM Policy until next review cycle.</div>			
Element Description			
Status of Element			
Process Description			
<p>2.1.0 Establish the Asset Management Framework (AMF) is typically developed in conjunction with or shortly after drafting the Asset Management Policy. What is important to understand before developing Asset Management Policy is the scope of the AMF. In the AMF, the critical business processes and the roles that will be subject to the policy and the AMF. Note that AMF and AMF are used interchangeably within the AMF document.</p> <p>2.1.1 establish to understanding the AMF scope, commencing with AMF stakeholders to identify current issues, business processes, challenges, opportunities, and future changes to AMF objectives and future expectations to establish the Asset Management Policy. This ensures the policy aligns with stakeholders' needs and expectations and reflects the AMF's broader Asset Management goals. The consultation process should involve senior stakeholders and help build a sense of ownership and commitment to the policy.</p> <p>2.1.2 Once the AMF has been developed, it is essential to confirm a set of changes to the current AMF. This must verify the scope and set of changes to the Asset Management System Framework Policy to be implemented, the policy's effectiveness. The size and scope of changes to the Asset Management System will depend on the objectives and principles outlined in the Asset Management Policy, the state of the AMF, and the state of anticipated changes to the organization. Consultation with AMF can help to identify the specific changes that will be required, as well as any potential challenges or barriers to implementation. By confirming the scope and set of changes to the Asset Management System and engaging with staff to ensure that the changes align with their needs and expectations, we will ensure our AMF remains effective, efficient, and sustainable.</p> <p>2.1.3 After confirming the scope and set of changes to the Asset Management System and understanding any changes to the business environment, the AMF Policy should be drafted or updated to reflect these changes. This involves considering recent or forecast business changes and their impacts on the Asset Management System. The revised policy should reflect any changes to the scope, objectives, or principles and remain aligned with overall corporate and AMF objectives. Once drafted, stakeholders should be consulted to ensure the policy reflects their needs and expectations.</p> <p>2.1.4 After the updated Asset Management Policy has been developed, it needs to be reviewed by the Strategic Asset Management Working Group (impossible for exceeding the AMF). This group can provide feedback and ensure the policy aligns with the broader AMF objectives, implementing any feedback provided by the Working Group as warranted, as this can help improve the quality and effectiveness of the Asset Management Policy and the effectiveness of our AMF.</p> <p>2.1.5 The final step involves implementing the updated Asset Management Policy to the Executive Leadership Team (ELT). An endorsement and sign-off. This step provides a clear understanding of the changes made to the policy, the reasons behind these changes, and the expected benefits and outcomes of the updated policy. The ELT should be fully informed of any feedback received from stakeholders and how this feedback has been addressed. Obtaining endorsement and sign-off from the ELT demonstrates their commitment to effective asset management. It ensures the policy is fully endorsed and that the resources support its implementation across all aspects of AMF operations.</p> <p>2.1.6 The final step involves communicating the updated Asset Management Policy to stakeholders, implementing changes to the Asset Management System to align with the policy, and monitoring the policy's effectiveness and the next review cycle. This involves regularly reviewing the policy and its implementations, including adherence to its principles, to ensure alignment with AMF's goals and objectives. By following these steps, we can ensure our policy is fully integrated into operations and remains effective and efficient.</p>			
Alignment			
Asset Management Objective		Description	
ISO55001 Clause		Guides AMO development, aligns to all	
SPMSM Leadership Subject Reference		5.2 - Policy, 7.3 - Awareness	
ISMS Reference		1 - Asset Management Policy	
Current ISO55001 Maturity		2.1 - AM Policy Development	
Responsibility/Accountability		2.3 Based on ISO 55001 AM Maturity Assessment	
Systems		X 100 0 100	
AMM Implementation Plan Status			
Title/Description		Responsible	Status
No improvement currently identified		Asset System Specialist	Review Scheduled 2024
Priority/Outputs Defined			
Title/Description		Reference	
Asset Management Policy <td colspan="2">AM Policy</td>		AM Policy	
Main Information			
Title/Description		Reference	
Related Information			
Title/Description		Reference	
ISO 55001 - Asset Management - Management Systems - Requirements		See ISO	

Key Lessons Learnt

- Active engagement is essential – ownership matters
- Communications and training
- Adaptability is vital – asset management isn't static
- Embracing digital transformation enhances decision-making

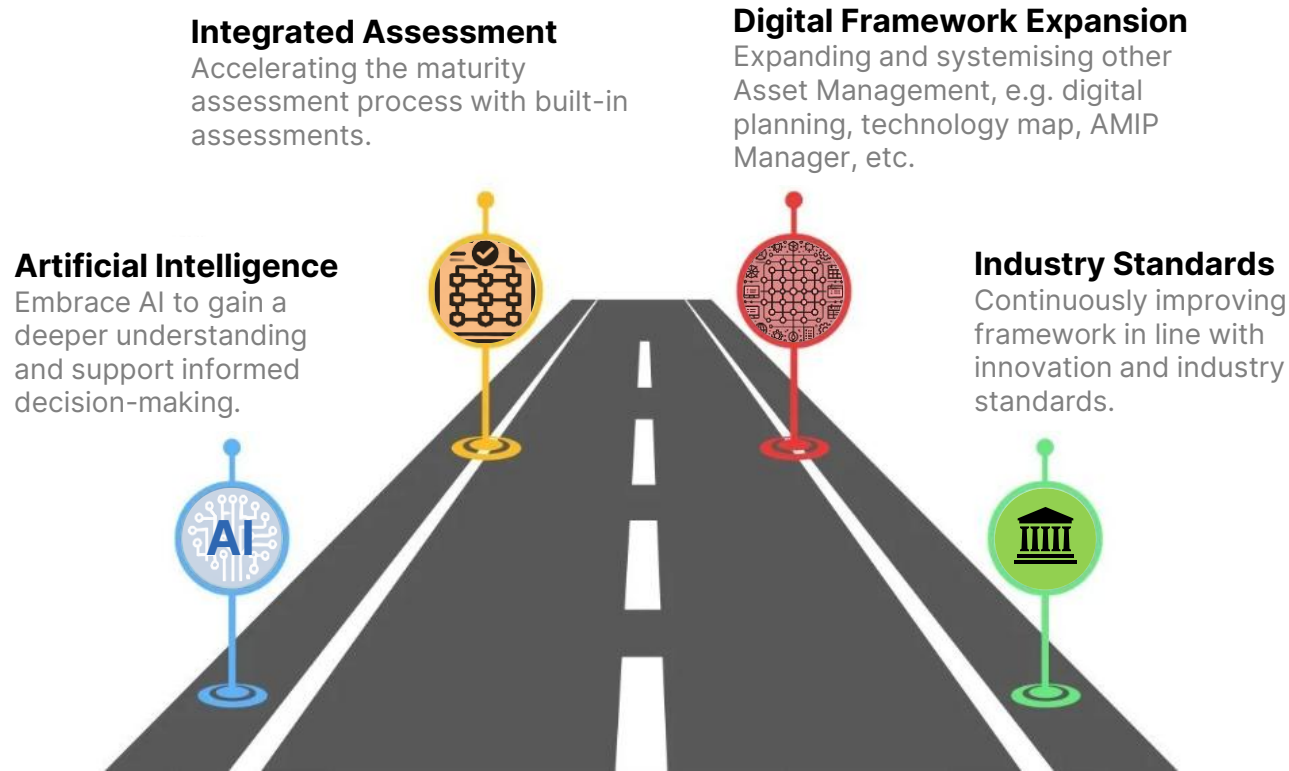


Digital AMF – One stop shop

Easy Content Management

Looking Ahead

- Expanding the digital framework approach
- Integrating AI as a SME and for asset performance monitoring
- Continuous evolution with industry best practices



Conclusion

Get Started Transforming your AMF

- A digital AMF as an enabler, an accelerator, not just a product
- ISO 55001 success proves its effectiveness
- Other asset-intensive industries can replicate the digital framework approach

IAM 10 Box Model Framework Example





Questions

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Building a Clear and Audit-Ready Asset Management Framework at Southern Ports

Johannes Snyman (Southern Ports), Craig Roberts, and Mark Rippon (BetterAIM)

1 Abstract

Southern Ports faced the challenge of aligning its Asset Management System (AMS) with ISO 55001 while ensuring operational efficiency across multiple port locations. They required a centralised and structured approach to become the fifth port authority globally to achieve ISO 55001 accreditation. BetterAIM collaborated with Southern Ports to implement betterAMF, a dynamic asset management framework designed to provide an easy to access, one stop source of knowledge for all aspects of Southern Ports' asset management system, and to enhance its audit readiness. This paper explores the collaborative approach, implementation strategy, and the benefits realised, offering insights for other asset-intensive industries.

Keywords: Asset Management, ISO 55001, Audit Readiness, Digital Framework, Compliance, Institute of Asset Management (IAM)/GFMAM 39 Subjects/GFMAM 40 Subjects

2 Introduction

Southern Ports aimed to align its Asset Management System (AMS) with ISO 55001 to improve efficiency, centralise documentation, and define clear responsibilities across all aspects of its asset management activities. Government trading enterprises are not required to obtain ISO 55001 certification; however, achieving compliance allowed Southern Ports to demonstrate practical, prudent, and efficient asset management processes. The transition to a more structured framework was essential to overcoming challenges related to disparate asset information, outdated documentation, and difficulties in delivering the Asset Management Improvement Plan.

BetterAIM partnered with Southern Ports to introduce betterAMF, a centralised and adaptive digital framework designed as an Asset Management Manual. The framework facilitated live updates, structured process documentation, improved access to the latest documentation against each relevant framework subject area and used a digital-first approach that enhanced compliance, visibility, efficiency and auditability.

3 Challenges and Drivers for Change

Southern Ports faced significant challenges in managing asset information effectively. As with many organisations, the existing asset management manual was paper based, challenging to navigate, and rarely used across the organisation. Documentation was often outdated, which created inefficiencies in decision-making and compliance efforts. In many cases, most staff were unaware of the scope of the AMS or that a document outlining the AMS existed. Documentation underpinning each AMS element (standards, strategies, procedures, etc.) were dispersed across multiple corporate repositories and not easy for end users to find. Roles and responsibilities for each interconnected AM function had gaps in clarity because there was not an easy way to access or view ownership across all systems elements in an up-to-date RACI. Without a structured system, the organisation struggled to execute its Asset Management Improvement Plan and align its operations with ISO 55001 requirements.

The leadership team at Southern Ports strongly supported the adoption of ISO 55001 to target improved governance and accountability across asset management functions. Achieving certification would not only demonstrate compliance with industry best practices but also enhance operational credibility and efficiency. Southern Ports sought a solution that could centralise asset management information, provide a structured approach to compliance, and ensure a seamless transition to a more mature asset management system.

4 Implementation Approach

Initial Assessment

Before implementing betterAMF, Southern Ports had undertaken an ISO 55001 and IAM 39 Subject Maturity Assessment. This was followed by a health check in early 2024 to assess the status of key initiatives and identify areas requiring further improvement. Based on the reviews, and changes to business priorities, organisational

purpose, structure, and the operating environment, it was identified that an AMF refresh would add clarity and improve direction. BetterAIM used the assessments to align the digital framework with Southern Ports' operational needs, ensuring that the framework addressed key issues such as RACI, documentation and process alignment gaps.

Digital-First Deployment

The digital framework was designed to integrate seamlessly within Southern Ports' IT environment. Microsoft SharePoint was selected as the deployment platform due to its ease of use, accessibility, low cost compared to other solutions, and compatibility with the organisation's digital infrastructure. This choice allowed for streamlined implementation while maintaining flexibility for future updates.

Collaboration between BetterAIM and Southern Ports was critical to the success of this transition. Led internally by Johannes Snyman, the project involved close engagement with key personnel to ensure alignment with organisational objectives. Stakeholder participation was prioritised through structured consultation sessions, enabling key team leaders and AMS element process owners to provide feedback and refine the framework iteratively. This approach emphasised the importance of engaging the owners of each AMS element, encouraging them to take ownership and agree on the content. In some cases, this led to productive discussions about overlapping or ambiguous areas of responsibility.

Rapid Deployment and Change Management

The digital framework was successfully deployed within three months. The rapid timeline was made possible by leveraging existing frameworks and tailoring them to Southern Ports' specific needs. Regular stakeholder engagement ensured the system was configured to align with Southern Ports' governance structures and operational workflows.

Southern Ports provided digital access to the evolving Digital Asset Management Manual to facilitate adoption. Process owners were empowered to modify and refine framework components in real time, ensuring the system remained relevant and responsive to operational needs. A competency and training matrix was also developed to support ongoing asset management improvements over the next three years.

Feedback from key stakeholders was overwhelmingly positive, as the digital framework provided easy access to essential asset management information that had previously been difficult to locate or was missing. The enhanced visibility and accessibility improved organisational engagement, strengthening accountability and ownership. Looking forward, a key focus area will be the required process and mindset change needed to update the framework following each change, e.g. organisational structure and role change, changes with ISO, etc.

5 Key Outcomes and Achievements

ISO 55001 Accreditation

Southern Ports became the fifth port authority in the world to achieve ISO 55001 accreditation. The digital framework played a crucial role in this achievement by providing a structured, audit-ready asset management system. One of the key innovations in the accreditation process was the ability to offer remote access to the ISO 55001 certification team, allowing for a seamless and efficient evaluation. Feedback from auditors was particularly positive, with the framework making the assessment process significantly more straightforward.

Operational Efficiencies

The implementation of the framework led to several operational improvements. By centralising all asset management elements, responsibilities, and processes into a single live framework, Southern Ports significantly enhanced the accessibility and usability of its asset management system. The framework aligns asset management activities and broader organisational objectives, ensuring a direct line of sight from strategy to execution.

In addition to compliance tracking, the digital framework allows Southern Ports to monitor its adherence to IAM's 39 Subjects and ISO 55001 requirements in real time. This proactive approach to asset management reduced administrative overheads and streamlined audit processes, making it easier to maintain compliance and drive continuous improvement.

The digital framework provides a valuable tool for onboarding and training new employees. It directly supports improvement in IAM's Knowledge Management subject area. Its visual format, backed by process descriptions, gives end users an understanding of how their outputs are used in other business processes across the organisation.

Furthermore, operational efficiencies extended to decision-making capabilities. The structured digital framework enables leadership and asset management teams to access up-to-date information instantly, reducing time spent searching for documents and improving the speed and accuracy of strategic asset management decisions.

Lessons Learned

Implementing the framework at Southern Ports highlighted several key lessons applicable to other asset-intensive industries. First, successful asset management transformation requires strong business ownership and engagement from key process owners. While the digital approach provided the necessary framework, its effectiveness at Southern Ports depends on the active participation and ongoing refinement by the owners of each framework element.

Second, asset management frameworks must be continuously updated and adapted to evolving business needs. A static approach to compliance is insufficient; organisations must remain agile and responsive to industry and organisational developments. Finally, the framework demonstrated that a structured, digital-first approach could accelerate the path to ISO 55001 compliance while improving operational efficiency and strategic alignment.

6 Conclusion and Industry Implications

The successful deployment of betterAMF at Southern Ports underscores the value of a structured, dynamic, and audit-ready asset management framework. By transitioning from a fragmented and outdated manual system to a live, interactive platform, Southern Ports has set a benchmark for asset-intensive industries seeking to enhance compliance, efficiency, and long-term asset sustainability.

Beyond compliance, Southern Ports' case study demonstrates that digital asset management frameworks can drive broader operational improvements. The principles applied in this project can be adapted to other sectors, including utilities, transportation, mining, and public infrastructure. Organisations seeking to enhance their asset management systems should consider adopting a structured framework that prioritises accessibility, alignment with strategic goals, and continuous improvement.

Future work should focus on expanding the adoption of the digital framework, integrating emerging technologies such as AI-driven asset performance monitoring, aligning with technology requirements, and further refining best practices for asset management maturity.

Figure 1. Southern Ports AMS Landing Page to AMS Element.

