

CMMS Implementation Checklist

From software selection to full deployment in 30 days

Before You Start: Pre-Implementation Foundations

- Identify a project champion (maintenance manager or operations lead)
- Define 3-5 measurable success metrics (e.g., reduce downtime by 20%)
- Audit current maintenance data — asset lists, PM schedules, work order history
- Get executive sponsor sign-off and budget approval
- Assemble implementation team (IT, maintenance lead, 2-3 technicians)

Week 1: Planning & Configuration (Days 1-7)

System Setup

- Create CMMS instance and configure organization settings
- Set up user roles and permissions (Admin, Manager, Technician, Requester)
- Define location hierarchy (Sites → Buildings → Floors → Rooms)
- Configure work order statuses and priority levels
- Set up notification rules (email, push, SMS)

Workflow Design

- Map out work order lifecycle (Request → Assign → In Progress → Complete → Close)
- Create 3-5 work order templates for common tasks
- Define approval workflows (who approves what, auto-assign rules)

- Set up custom fields for your industry requirements

Pro Tip: Don't try to replicate your old process exactly. Use this as an opportunity to simplify workflows.

Week 2: Data Migration & Asset Setup (Days 8-14)

Asset Import

- Clean and standardize asset data (names, categories, locations)
- Import asset registry via CSV or API
- Attach photos, manuals, and warranty documents to critical assets
- Verify asset hierarchy and parent-child relationships

PM & Inventory Setup

- Import preventive maintenance schedules
- Set PM triggers (time-based, meter-based, or condition-based)
- Enter spare parts inventory with reorder points
- Link parts to relevant assets and work order templates

Pro Tip: Start with your top 20% critical assets. You can add the rest after go-live.

Week 3: Testing & Training (Days 15-21)

Pilot Testing

- Run pilot with 3-5 technicians on real work orders for 3 days
- Test mobile app: create, update, and complete work orders in the field
- Verify notification delivery and escalation rules
- Test reporting dashboards with pilot data

- Document issues and refine configuration

Team Training

- Train all technicians (1-hour hands-on session, focus on mobile app)
- Train managers on reporting, dashboards, and PM oversight
- Train requesters on how to submit maintenance requests
- Create quick-reference guides (1-page cheat sheets)
- Set up a feedback channel (Slack/Teams channel or shared doc)

Week 4: Go-Live & Stabilization (Days 22-30)

Launch

- Announce go-live date to entire organization
- Migrate all open work orders from old system
- Decommission old system / spreadsheets (cut the cord!)
- Assign a "floor champion" per shift/area for first-week support

Monitor & Optimize

- Daily check: work order completion rate, overdue tasks, user adoption
- Hold daily 10-min standup with implementation team (first week)
- Address user issues within 24 hours
- Review and adjust PM schedules based on initial feedback
- Schedule 30-day review meeting to assess success metrics

Success Metrics to Track

- Work order completion rate (target: 85%+ in first month)
- Average response time (target: under 4 hours)
- PM compliance rate (target: 90%+)
- User adoption rate (target: 100% of technicians logging in daily)
- Reduction in unplanned downtime (target: measurable within 90 days)