ADMINISTRATIVE

Task	Status	Notes
Identify implementation lead/CMMS champion		
Create a CMMS steering committee make up of key stakeholders to address planning and obstacles		
Confirm key project dates (ie. project start date, go-live date, etc.)		
Create implementation schedule and notify stakeholders of dates and roles		
Order or book necessary supplies and resources for implementation and training (ie. boardroom access)		
Block time to do onboarding and training for CMMS users		
Book consultations with CMMS vendors through pre-implementation and implementation		

CMMS implementation checklist

Pre implementation checklist

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DATA AND WORK MANAGEMENT

Task	Status	Notes
Create a list of CMMS users		
Create a list of maintenance contractors, suppliers, and vendors		
Create and organize a list of assets		
Create a list of all parts and supplies		
Create a list of checklists and SOPs for applicable assets		
Create a list of scheduled maintenance activities and routine inspections/repairs with frequencies		
Create a list of backlogged work orders		
Compile a record of meter readings from equipment		
Create a list of asset events if applicable		

DOCUMENTATION

Task	Status	Notes
Prepare a diagram of the facility layout		
Prepare an organizational chart for your facility personnel		
Prepare a manual of production processes		
Prepare a document with maintenance and production goals, objectives, and key metrics		
Prepare a list of regular maintenance and safety/ auditing reports (ie. cost reports, KPI reports, etc.)		
Create a 30-day, 60-day, and 90-day plan and goals for your CMMS.		
Prepare all supporting documents for equipment (SOPs, OEM guidelines, manuals, diagrams, etc.)		
Prepare a copy of union contracts (if applicable)		
Prepare a list of routine meetings		

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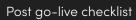
Task	Status	Notes
Add or transfer all scheduled maintenance and maintenance triggers		
Configure maintenance types		
Configure work requests and maintenance logs		
Add assets and configure asset hierarchy		
Set up asset profiles, including relevant repair history, diagrams, manuals, SOPs, etc.		
Create user groups and set up permissions		
Set up task groups and apply to assets/maintenance types/work orders		
Set up permissions and access for requesters and contractors		
Configure reports and set up reporting schedule		

CMMS implementation checklist

CMMS implementation and go-live checklist

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Task	Status	Notes
Configure dashboards		
Add parts and supplies		
Configure minimum quantities for all parts and supplies		
Set up parts purchasing processes and settings		
Connect the CMMS to data historians and test this connection (if applicable)		
Connect the CMMS to business systems (ie. an ERP) and test this integration (if applicable)		
Conduct training for users		
Conduct regular meetings with the CMMS steering committee to address issues or obstacles		
Officially go live with the CMMS		

CMMS implementation checklist

Post go-live checklist

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Task	Notes
Monitor your dashboard and reports and identify areas of concern (ie. low PM compliance)	
Monitor your dashboard and reports to identify progress and quick wins from your CMMS. Share these wins with your team	
Monitor the dates of recent logins for users to identify where CMMS adoption can be improved	
Monitor PM triggers and notifications to ensure work orders are being triggered on time	
Review CMMS-generated reports to ensure they are accurate	
Review parts and inventory counts and syncs to ensure they are accurate	
Schedule weekly meetings with CMMS steering committee and CMMS users (ie. technicians, requesters, planners) to review wins, feedback, and obstacles	
Review and adjust your 30-day, 60-day, and 90-day plan for CMMS usage and goals	
Set up email groups for users in similar roles across sites (only applicable to multi-site implementation)	
Set up a system that users can access to request support	