CHECKLIST

CMMS migration checklist

If you're seriously considering switching software, good preparation can make the transition much easier.

Here are the main things to check before you migrate.

1 Take inventory of your current environment

Start by documenting what your team actually uses in your CMMS.

- [ ] Vehicles and equipment
- [ ] Preventive maintenance
- [ ] Maintenance history
- [ ] Suppliers
- [ ] Automations
- [ ] Integrations
- [ ] Users
- [ ] Work orders
- [ ] Parts inventory
- [ ] Reports
- [ ] Documents
- [ ] Regulatory processes

This step will help you separate the features that are truly essential from the ones you rarely or never use.

2 Confirm you can get your data back

Before leaving your current vendor, make sure you know exactly which data you can retrieve.

- [ ] Complete repair history
- [ ] Preventive maintenance
- [ ] Suppliers
- [ ] Available export formats
- [ ] Vehicles and equipment
- [ ] Inventory
- [ ] Documents and attachments
- [ ] Any fees related to exporting

Your maintenance history is valuable. Retrieving and migrating that data should be part of your planning from day one.

3 Define your must-haves

Before sitting through several demos, set your priorities.

- [ ] Which features does your shop absolutely need?
- [ ] What would you like to improve?
- [ ] Which tasks do you want to automate?

Use the migration to improve your processes, not just to recreate your old system.

4 Map your integrations

List the systems that need to communicate with your new CMMS:

- [ ] Telematics
- [ ] ERP
- [ ] Accounting
- [ ] Dispatch
- [ ] Internal systems
- [ ] Other operational platforms

Then check with the new vendor how data will flow between these systems.

5 Evaluate the support offered

A migration isn't just about the software. Ask the vendor who will be responsible for:

- [ ] Migrating your data
- [ ] Configuring your environment
- [ ] Adapting the software to your processes
- [ ] Training your users
- [ ] Testing integrations
- [ ] Supporting you through go-live

You should know clearly what your team will need to handle and what the vendor will do for you.

6 Prepare for go-live

Before retiring your old solution:

- [ ] Validate the imported data
- [ ] Test your preventive maintenance schedules
- [ ] Check your work orders
- [ ] Test your integrations
- [ ] Train your users
- [ ] Keep a copy of your old data
- [ ] Plan for support during the transition

The goal is simple: switch CMMS software without losing control of your maintenance operations.