

# 5 STEPS TO A SUCCESSFUL CMMS IMPLEMENTATION

Most companies already have some form of a work request system in place, typically comprised of a combination of Excel spreadsheets, emails, and paper tickets. While these manual processes can get the job done, they are often very inefficient.

A growing number of companies are finding that Computerized Maintenance Management Systems or CMMS are powerful tools for managing facility requests, trouble tickets, and preventative maintenance schedules, as well as preventative and repetitive maintenance tasks. Automated CMMS solutions can greatly improve efficiency, communication, and accountability. Follow these 5 steps to implement a successful CMMS solution that works for your company.

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## STEP 1: IDENTIFY YOUR CURRENT PROCESSES AND ISSUES

- A. Determine how you are currently managing maintenance tasks.
- B. Document your current processes.
- C. Consider how you can improve those processes, including response time, user experience, and communication.
- D. Identify ways you can better track service level agreements, key performance indicators, and other metrics.



## STEP 2: MAP OUT YOUR IDEAL SOLUTION

- A. Need a self-service model where users can submit their own requests? If so, a web-based solution with unlimited user licenses may be most appropriate.
- B. Prefer a centralized help desk solution? Again, a web-based solution can be your best option, though you may want to establish a set number of user licenses.
- C. Determine how users should be notified of new requests and status changes. Automated email alerts can be a powerful means of communication for facilities managers, technicians, vendors, and requestors.
- D. Decide what types of reports would be most helpful, including open ticket, aging, and vendor reporting options.
- E. Choose a solution with an interface that's easy and intuitive enough for end users to access with minimal training.

## STEP 3: DETERMINE YOUR IDEAL BUSINESS PROCESSES AND WORKFLOWS

For this stage, you'll want the guidance of a dependable software vendor implementation team.

- A. Map out your processes from beginning to end, including end user requests, ticket submissions, ticket assignments, and close out.
- B. Identify all users and their roles. Who will have access to each function?
- C. Consider whether you need separate processes for vendors, tickets with assets associated with them, or emergency requests.
- D. Work your way through each scenario with your team, role-playing every step of each process.



## STEP 4: GATHER YOUR DATA

- A. Compile your user, equipment, and vendor lists, as well as categories, details, and other data points. Your software vendor implementation team should provide you with easy-to-use templates.
- B. Review your data internally, then submit it to your implementation team.



## STEP 5: IMPLEMENT YOUR SOFTWARE

Look to your software vendor implementation team to guide you through the following steps:

- A. Establish all workflows, user roles, and rules.
- B. Import and test all data.
- C. Set up and test a pilot program including a few select end users, facility managers, and technicians.
- D. Schedule comprehensive training plans for all your end users, facility managers, and technicians.
- E. Once the pilot has been tested and approved, and training completed, begin rollout for the rest of the organization.

There is no need to be overwhelmed with the idea of implementing a comprehensive CMMS solution. The right software vendor implementation team will guide you through each of these steps, ensuring that your solution is successful from day one.

At ProLease, we leverage our 25+ years of experience in facilities management software to support hundreds of clients just like you. To learn more, visit our website at [proleasesoftware.com](https://proleasesoftware.com).

## ABOUT PROLEASE

Founded in 1992, ProLease is a leading provider of integrated facilities management software. Our Maintenance (CMMS) and Workplace (CAFM) software modules make it easy to manage facilitate requests, work tickets, PM schedules, seating charts, personnel moves, department allocations and more. Designed by experts with 25+ years of hands-on experience, ProLease delivers an integrated facilities management system that's both powerful and easy to use.

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