

CMMS evaluation scorecard



Back your software selection process with data

Use this template to guide your CMMS search. Whether you're implementing a CMMS for the first time or migrating from another tool, a clear scoring system helps you comprehensively evaluate key features and gain team buy-in for your final recommendation for each vendor you evaluate.

As you evaluate different systems, consider both depth of functionality and ease of use. A feature-rich CMMS is only valuable if your team can adopt and navigate it seamlessly. Think about how each tool fits into your existing workflows and whether it will streamline daily tasks or create new frustrations for your maintenance team and technicians.

Scoring system

Rate each item on a scale of 1-4:

- 1 Poor** – Lacks key functionality, difficult to use, or requires extensive manual work.
- 2 Fair** – Basic functionality exists but has limitations, inefficiencies, or usability issues.
- 3 Good** – Meets standard needs with some customization, but lacks best-in-class flexibility.
- 4 Excellent** – Provides intuitive, customizable, and highly efficient solutions.

For example:

Work order management (4 = Excellent)	Easy for requestors, seamless scheduling and monitoring, configuration capabilities, simple task assignments, strong reporting capabilities, and robust mobile access, including offline mode.
Work order management (1 = Poor)	Clunky workflows, too many steps, limited customization, limited access to historical data and reporting, and weak mobile functionality with no offline mode.

Each category contributes equally to the final score. Simply sum up all ratings for a total score.

Core functionality

Criteria	Questions to consider	Rating (1-4)	Notes
Work order management	How efficient is work order management? Can work orders be created, assigned, and tracked with minimal steps?		
Preventive maintenance scheduling	Does the system support automated PM scheduling? Can it trigger tasks based on time, usage, or sensor data?		
Asset management	Does the system allow easy tracking and management of all assets? Can you link assets to work orders, track maintenance history, and set lifecycle alerts?		
Inventory & parts management	How does the CMMS ensure accurate inventory tracking? Does it support cycle counting and real-time stock visibility?		
Mobile app	How intuitive is the mobile application? Can techs access it when they're offline?		
Reporting & analytics	How customizable are reports and dashboards? (Can users build reports without needing external tools?)		
Security & data privacy	What security measures does the system have in place? (SOC 2 Type II, data encryption, security testing, etc.)		
Compliance & regulatory features	Does the CMMS support industry compliance needs? (e.g., 21 CFR Part 11 for FDA compliance, CCPA, GDPR, etc.)		
TOTAL			

Ease of use & user adoption

Criteria	Questions to consider	Rating (1-4)	Notes
Intuitive interface & technician engagement	How intuitive is the interface for technicians, managers, and admins? Will technicians actually use it?		
User training & onboarding	How long does implementation typically take, and what support is provided? Is training included, and how quickly can our team be fully operational?		
Configurability	How easy is it to modify workflows, reports, and dashboards without vendor or IT support?		
Role-based permissions	Does the CMMS allow administrators to set role-based access levels? Can different user types have different permissions?		
Usability rating from technicians	Do technicians on your team find the interface easy to use??		
TOTAL			

Integration & scalability

Criteria	Questions to consider	Rating (1-4)	Notes
Integration with other systems (ERP, IoT, APIs)	Are there any systems in our workflows that should be connected to our CMMS?		
Cloud-based vs. on-premise options	Is the system cloud-based, on-premise, or hybrid? What are the pros and cons of each option?		

Scalability for growth	How well does the system scale across multiple locations, teams, and departments? Does it support multi-site asset tracking and reporting?		
TOTAL			

Support & vendor reliability

Criteria	Questions to consider	Rating (1-4)	Notes
Customer support responsiveness	What response times can we expect for support? Is 24/7 live support included, or is there an additional cost?		
Training & documentation resources	Does the vendor provide ongoing training and support? Are there solid help center resources?		
Vendor reputation & reviews	What do current customers say about the CMMS? Are third party reviews and case studies available?		
Implementation & migration assistance	What types of implementation and migration support are provided?		
Product roadmap & vision	How often is the software updated, and what types of features are planned for future releases?		
TOTAL			

Cost & ROI

Criteria	Questions to consider	Rating (1-4)	Notes
Pricing transparency	What is included in the base price, and what requires an additional fee?		
Total cost of ownership	What is the full cost over 3–5 years, including licensing, implementation, training, and maintenance?		
ROI potential & efficiency gains	What measurable efficiency gains can we expect—are there benchmarks available?		
Contract flexibility & terms	Can we easily scale up or down based on changing needs?		
TOTAL			

Vendor information

CMMS name:

Vendor name:

Evaluation date:

Evaluator(s):

Final evaluation

Overall score: ____/ 100

Strengths:

Weaknesses:

Final recommendation: