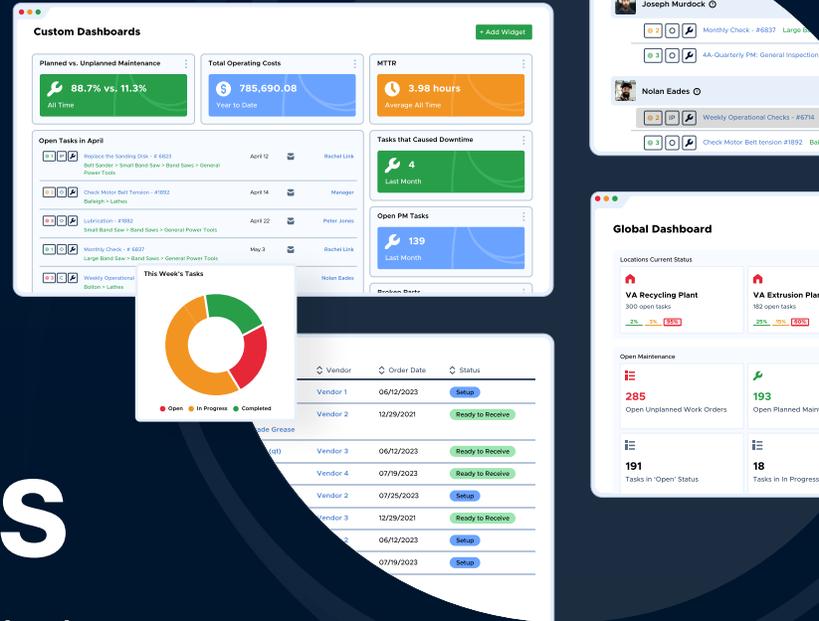




Migrating to a new CMMS

8 steps for a seamless switch



Switching to a new maintenance management system can feel overwhelming, but sticking with the wrong platform will hinder your team's growth.

There are many reasons you may be looking to switch to a new CMMS or EAM—low technician adoption, clunky workflows, lack of customization, frustrating customer support, and more. Whatever the reason, there's no time like the present to get your maintenance operations back on track.

This guide will help you identify key factors to consider when choosing a new maintenance management solution. With the right partner, the migration process should be a smooth transition with a clear path to success that supports your team for years to come.

1

Assess your current software

Before evaluating new platforms, conduct a thorough review of your current CMMS. Collaborate with key stakeholders to answer the following:

What are the strengths and weaknesses of our current system?

What feedback do users have on existing pain points and areas for improvement?

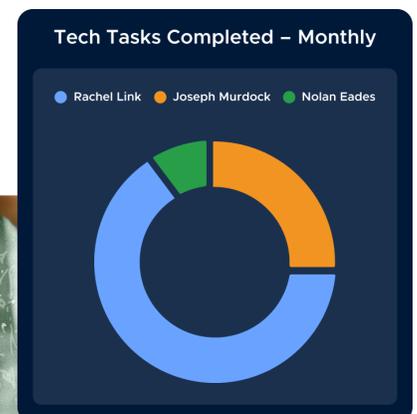
What core functionality gaps exist, and which teams or processes are most impacted?

What essential data (e.g., assets, work orders, PM schedules, vendor details) must be migrated to a new system?

What's your ideal future state with your CMMS (e.g. better technician adoption, superior mobile app)?

Can we quantify the cost or operational risks of staying with our current CMMS?

Would a new CMMS solve our challenges, or should we explore other process improvements first?



2

Define your migration goals

Defining your migration goals isn't just about checking boxes—it's about ensuring your new system delivers real, measurable value. Everyone wants a CMMS that's "easier to use," but why does that really matter? A more intuitive system leads to faster adoption and better data integrity—which translates into smoother maintenance operations and long-term cost savings.

By setting clear goals upfront, you can measure success post-migration and prove the value of your investment. Consider these key questions as you evaluate CMMS alternatives:

When is the right time to migrate systems and what factors should influence our timing?

How much time will we save on reporting and how will that improve decision-making?

How will automation reduce manual data entry and free up manager time?

How will increased technician adoption enhance daily operations and productivity?

How will system integrations streamline key workflows and reduce inefficiencies?

What other business initiatives will be impacted or improved by this migration?

What level of time and resources can our team realistically allocate to a migration?



Defining these success criteria early ensures that your CMMS migration isn't just a software upgrade—it's a strategic move toward greater efficiency and operational excellence.

3

Get team buy-in & do your research

Before evaluating new CMMS solutions, collaborate early with other teams that will be impacted by the migration. While maintenance may be the primary user, operations, IT, finance, and procurement often play a critical role in implementation and long-term success. Engaging these teams upfront will get everyone on the same page around technical requirements, budget, and goals before you start the CMMS evaluation process.

Once you've defined what you need in a new CMMS and identified key stakeholders, start researching potential solutions:



Leverage third party review sites like [G2](#) and [Capterra](#)



Get guidance from unbiased, expert analysts in the space—check out [this CMMS report from Verdantix](#)



Make a short list of three CMMS tools that might be an improvement over your existing system and set up demos with each



Evaluate and score every vendor using a comprehensive scoring system—[here's a sample scorecard template](#) to back your CMMS selection process with data



By doing your homework and collaborating with relevant teams early, you can streamline the evaluation process and make a confident, well-informed decision.

4

Clean and prepare your data

A smooth migration starts with clean, well-structured data—migrating outdated or irrelevant data can cause long-term inefficiencies or reporting issues. Take the time to audit, organize, and understand how your data will function in the new CMMS environment before transitioning.

Before you begin, identify the right point of contact for data extraction—typically, this will be your system administrator, superuser, or IT team. These individuals can help you export existing data and ensure you have access to the right files. If you're unsure where to start, check if your current CMMS has built-in export tools or reporting features that allow you to extract data in bulk.

When gathering your data, focus on cleaning and standardizing it to avoid errors during migration:

- **Remove** duplicate, incomplete, or obsolete records
- **Standardize** naming conventions and asset categories for consistency
- **Format** data correctly to match the new CMMS requirements
- **Back up** all critical data in a secure location



5

Choose the right migration approach

The best migration method depends on the complexity of your data, the capabilities of your new CMMS, and the resources available to your team. Smaller organizations with limited data may opt for manual entry, while larger operations can benefit from automated imports or vendor support. Assess your data's size, structure, and quality to determine the best approach—or a combination of methods.

Here are the most common migration methods:

Manual entry	Best for small datasets but can be time-consuming and prone to human error
CSV import	Enables bulk data transfers, but requires proper formatting to align with your new CMMS
API integration	Ideal for large-scale migrations, allowing automation and seamless data transfers
Vendor-assisted migration	Many CMMS providers offer expert services to ensure accuracy and minimize errors
Third-party consultant	Used when external expertise is required for data cleaning, structuring imports, and configuring new maintenance workflows



Selecting the right approach ensures a smoother transition with minimal interruptions, helping your team get up and running quickly in the new system.

6

Plan the transition timeline

A well-structured transition timeline is critical to minimizing disruptions and ensuring a smooth migration. Ideally, you should plan for 2-3 months of CMMS overlap—around 12 weeks is a strong benchmark. Larger, more complex organizations may require 6+ months of overlap to accommodate extensive integrations, training, and data requirements.

To ensure a seamless transition, create a detailed migration plan that includes:

- ✓ **A migration timeline** with key milestones to track progress and keep teams aligned
- ✓ **Hands-on training sessions** and access to resources designed to drive technician adoption
- ✓ **A phased rollout approach (if applicable)** to gradually transition teams while maintaining operations
- ✓ **A contingency plan** to address potential challenges and unexpected delays
- ✓ **Internal subject matter experts** to oversee different aspects of the migration process and ensure alignment and adoption across teams
- ✓ **Device access planning** that outlines which employees and/or devices will have CMMS access



By setting a clear timeline and structured rollout plan, you can ensure that your team fully adopts the new system before retiring the old one—maximizing the value of your CMMS investment.

7

Test and validate before full launch

Before rolling out your new CMMS, it's helpful to conduct a structured testing phase to catch potential issues early. Think of this as a dress rehearsal—your chance to verify that data has migrated correctly, workflows function as expected, and users feel confident using the system. A thorough testing period can prevent costly errors and ensure a smoother adoption process.

Key areas to focus on during testing:



Choose a pilot team or location: Test the new CMMS with a group who can provide helpful feedback



Verify data accuracy: Ensure all assets, work orders, and historical data transferred correctly



Ensure workflows function correctly: Test preventive maintenance schedules, approval processes, and reporting



Identify and resolve any issues: Address integration errors, system bugs, or missing data before go-live



Collect user feedback for refinements: Get input from technicians and managers to fine-tune usability and workflows



Testing allows you to catch problems early, make necessary adjustments, and build confidence in the new system before fully transitioning your team.

8

Go live and monitor performance

With testing complete, it's time to officially launch your new CMMS. However, going live isn't the finish line—it's the beginning of continuous improvement. A successful rollout requires ongoing monitoring to ensure the system runs smoothly, users are engaged, and key processes are functioning as expected.

Focus on these critical areas post-launch:

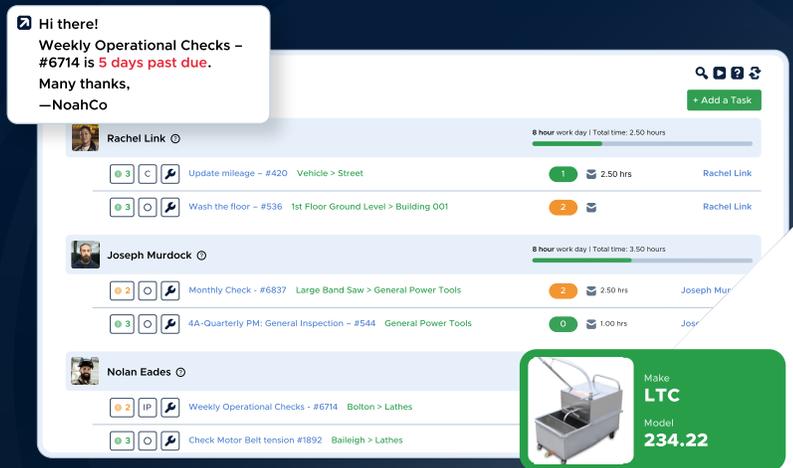
- **System stability:** Ensure the platform is running reliably with minimal disruptions
- **User adoption and feedback:** Track how quickly teams adapt and address any usability challenges
- **Performance metrics and reporting accuracy:** Verify that work orders, asset tracking, and analytics reflect real-time data
- **Other asset performance investments:** Evaluate improvements to tools (e.g., monitoring sensors) that are directly impacted by the new CMMS to ensure seamless integration and optimal performance



After launch, continue refining processes, optimizing workflows, and addressing user concerns to maximize the value of your CMMS investment. Regular check-ins with key teams will help ensure long-term success.



The right CMMS is your key to success



If you're busy and overwhelmed at the thought of migrating systems, you should prioritize selecting a vendor based on customer support, implementation, and ease-of-use. These are core principles at Limble.

Here are some of the ways we achieve an industry-leading 97% implementation success rate and facilitate a smooth, simple process for Limble customers:

-  **Customer success:** Customers on Premium+ and Enterprise plans have a dedicated Success Manager to help them get set up and provide guidance along the way
-  **Customer support:** In-house team available 24/7 with average response times under 60 seconds on weekdays and 4 hours on weekends
-  **Online resources:** Interactive training classes, peer-to-peer engagement via the Limble Community, and robust library of Help Center articles and YouTube tutorial videos
-  **Easy to use:** Consistently rated the #1 easiest-to-use CMMS by third-party review sites like G2 and Capterra

Island Abbey Nutritionals unlocked real business value by switching to Limble



“Limble is our top time- and cost-saving asset we have here at Island Abbey Nutritionals.”

Colin McGuirk | *Maintenance Supervisor*



Island Abbey Nutritionals, a leading manufacturer of innovative natural health products, transformed their operation by migrating from another CMMS to Limble.

Before Limble, the team struggled with outdated, inefficient maintenance processes that led to communication gaps and unnecessary downtime. By making the switch, they streamlined their operations, reduced equipment downtime, and improved technician productivity.

“A single hour of downtime costs us up to \$30,000-\$40,000. Before switching to Limble, we were seeing downtime all over the place. Now, we're at 98% uptime.”

Josh Galer | *Engineer and Maintenance Manager*

The results

98% average uptime

90% reduction in audit time

30% savings on parts

Island Abbey’s maintenance team now operates with confidence, knowing they have a CMMS that supports their growth and efficiency goals. [Watch the full story here.](#)

Limble ensures a smooth migration

At Limble, we understand that every business has unique migration needs. That's why we offer tailored solutions to ensure a smooth transition, whether you need a hands-on approach or a guided self-service option.



Standard, self-guided migration

If you have an in-house team handling migration, we provide robust import tools, API capabilities, and dedicated support to help you every step of the way.



Comprehensive migration support

Our expert team will provide you with the right resources to ensure data accuracy and seamless integration into Limble's CMMS (available at an additional fee).



White glove support

We partner with trusted third party specialists – like the [FM360 Consulting](#) team – to assist with more complex migrations, giving you additional expertise and resources to ensure the project stays on track (available at an additional fee).

Regardless of your needs, Limble is here to make your migration process efficient, stress-free, and successful.

Migrating from one CMMS to another requires careful planning, data preparation, and user training to ensure success, but the benefits outweigh the effort. Follow these steps to ensure a smooth transition, improve efficiency, and maximize the value of your new system.

→ **Need help with your CMMS migration? [Contact our team for expert support!](#)**