

CMMS requirements template.

A template to fill in, so you can frame your project, brief every vendor from the same base, and compare their answers without losing the thread.

READY TO FILL IN

10 PAGES

WORKS WITH ANY VENDOR

WHY WE PUBLISH IT

A buyer who knows what they want asks better questions, and chooses better. This document is deliberately **neutral**: it will serve you whether you talk to us or not, and it also helps you challenge us. Pages 8 and 9 hold the questions many vendors would rather not hear. Ask us too.

It does not need to be perfect.

It needs to give an honest picture of your organisation and your priorities. Four honest pages beat forty copied from a template.

THREE THINGS BEFORE YOU START

- 01 Fill it in together, not alone.** A maintenance manager, a field technician and whoever keeps the storeroom will not describe the same job. Where they disagree is the most useful information in the document.
If you can only involve one more person, pick a technician. They will use the tool every day, and their refusal alone is enough to sink the project.
- 02 Write what you do, not what you wish you did.** A CMMS does not create an organisation: it makes the existing one visible. Describing a disciplined preventive programme nobody actually follows will make you buy a tool for a company that is not yours.
- 03 Rank, do not tick everything.** If everything is essential, nothing is, and every vendor will answer "yes" to all of it. The "Essential" column should hold ten lines at most.

WHAT IS IN THIS DOCUMENT

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Who are you, and who will use it?

COMPANY

PERSON FILLING THIS IN

ROLE

EMAIL

PHONE

IN THREE LINES: WHAT YOUR COMPANY DOES, AND WHAT YOU MAINTAIN

YOUR SECTOR

- | | | |
|--|---|--|
| ☐ Manufacturing | ☐ Food and beverage | ☐ Energy and utilities |
| ☐ Buildings and real estate | ☐ Healthcare and laboratories | ☐ Transport and logistics |
| ☐ Public sector | ☐ Maintenance service provider | ☐ Other |

THE NUMBERS THAT FRAME THE PROJECT

PEOPLE IN THE COMPANY

PEOPLE IN MAINTENANCE

NUMBER OF SITES

ASSETS TO TRACK (ESTIMATE)

JOBS PER MONTH (ESTIMATE)

SPARE PART REFERENCES

WHO WILL USE THE CMMS

- | | |
|---|--|
| ☐ Technicians: carry out the work, usually on a phone | ☐ Maintenance manager: plans, assigns, watches the numbers |
| ☐ Storekeeper: runs the stock and the purchase orders | ☐ Requesters: report a fault, and nothing else |
| ☐ Management: looks at cost and availability | ☐ Contractors: work without seeing the rest |

THE NUMBER THAT MOVES THE BUDGET

Count **people who do the work** and **people who only report a fault** separately. Many vendors price per user with no distinction, and requesters alone can double the bill. It is the first question to ask, on page 9.

How do you cope today, without the tool?

This is the section vendors read first, and the one buyers fill in fastest. Take your time over it: it decides how hard the project really is.

WHAT YOU USE TODAY

- | | | |
|--|--|--|
| ☐ Paper, notebook, binder | ☐ Spreadsheet | ☐ A messaging group |
| ☐ An in-house tool | ☐ A CMMS already in place | ☐ Nothing formal |

IF A CMMS IS ALREADY IN PLACE: WHICH ONE

SINCE WHEN

WHY YOU ARE CHANGING

- | | |
|--|---|
| ☐ Technicians do not use it | ☐ Too complicated to use |
| ☐ Functions are missing | ☐ Too expensive for what it brings |
| ☐ No decent mobile access | ☐ Disappointing support or vendor |
| ☐ End of life, no longer maintained | ☐ Other |

ADVICE

If you are changing because **nobody uses it**, the problem is almost never the feature list. It is the time a technician spends typing, and who filled the asset register in the first place. Keep that in mind when a vendor walks you through their catalogue.

THE DATA YOU ALREADY HAVE

This is what really drives the timeline of a CMMS project. Tick what exists, even if it is messy.

- | | |
|--|---|
| ☐ An asset list (spreadsheet, inventory, drawing) | ☐ A spare parts inventory |
| ☐ Maintenance routines or checklists | ☐ A job history you can recover |
| ☐ Service contracts and their due dates | ☐ Nothing structured, it all has to be built |

WHAT WASTES THE MOST TIME TODAY, IN ONE SENTENCE

What will have changed in a year?

A useful goal can be measured. "Get better organised" cannot be measured, so it cannot be checked, so it cannot be defended to a board.

YOUR GOALS

- ☐ Know what was done, by whom, and when
- ☐ Move from reactive to preventive
- ☐ Reduce equipment downtime
- ☐ Know the real cost per asset
- ☐ Keep the knowledge when someone leaves
- ☐ Stop losing maintenance requests
- ☐ Never miss a statutory inspection again
- ☐ Get the spare parts stock under control
- ☐ Prove the work done to a client or an auditor
- ☐ Other

MAKE THEM MEASURABLE

Take your three main goals and write, for each, **today's number** and **the one you are aiming at**. If you do not know today's number, that is already a result: the first year will be about establishing it, and that is a legitimate goal.

YOUR THREE PRIORITIES, WITH NUMBERS

GOAL	TODAY	IN 12 MONTHS	HOW TO MEASURE IT

YOUR TIMELINE

DECISION WANTED BY

GO LIVE WANTED BY

HARD DATE (AUDIT, SHUTDOWN...)

What you need, ranked.

One line per function, one box per line. "Not needed" is a useful answer: it keeps you from paying for a module nobody will ever open.

FUNCTION	ESSENTIAL	WANTED	NOT NEEDED
A · EVERYDAY WORK			
Maintenance requests raised by the people on the floor	☐	☐	☐
Work orders: assignment, due date, priority, status	☐	☐	☐
Scheduling and a calendar view of the workload	☐	☐	☐
Full history per asset	☐	☐	☐
Photos and documents attached to the job	☐	☐	☐
Time spent and parts used, entered by the technician	☐	☐	☐
A job report you can print or send	☐	☐	☐
B · PREVENTIVE AND STATUTORY MAINTENANCE			
Calendar-based preventive plans	☐	☐	☐
Triggered by a meter reading (hours, cycles, km)	☐	☐	☐
Statutory inspections tracked apart from preventive work	☐	☐	☐
Routines and checklists filled in during the job	☐	☐	☐
Reusable job templates	☐	☐	☐
C · YOUR ASSETS			
Hierarchy of sites, buildings, lines, assets	☐	☐	☐
QR codes on assets	☐	☐	☐
Criticality, running state, technical documents	☐	☐	☐
Meters and readings	☐	☐	☐
D · SPARE PARTS AND PURCHASING			
Stock, movements in and out, several storerooms	☐	☐	☐
Reorder points and replenishment	☐	☐	☐
Consumption tied to the job	☐	☐	☐
Suppliers and purchase orders	☐	☐	☐

FUNCTION	ESSENTIAL	WANTED	NOT NEEDED
E · FIELD AND MOBILITY			
A mobile app for technicians	☐	☐	☐
Scanning a QR code to open the asset	☐	☐	☐
Working with no network, then syncing	☐	☐	☐
QR fault reporting with no account, for non-users	☐	☐	☐
Assignment and due-date notifications	☐	☐	☐
F · ORGANISATION AND ACCESS			
Roles and permissions per profile	☐	☐	☐
Teams, and several people on one job	☐	☐	☐
Several sites in one workspace	☐	☐	☐
Tracking by client, if you work for third parties	☐	☐	☐
Walled-off access for a contractor	☐	☐	☐
G · REPORTING			
Indicators: volumes, overdue work, time on the job	☐	☐	☐
Cost per asset and per period	☐	☐	☐
Exporting your data to a spreadsheet	☐	☐	☐
An audit trail of actions	☐	☐	☐
H · OPENNESS AND MIGRATION			
Importing your assets and stock at the start	☐	☐	☐
Custom fields specific to your trade	☐	☐	☐
An interface with an ERP or an accounting package	☐	☐	☐
An open, documented API	☐	☐	☐

A NEED SPECIFIC TO YOUR TRADE THAT THIS LIST DOES NOT COVER

The technical frame, and what it really costs.

DEPLOYMENT AND SECURITY

- ☐ Online, hosted by the vendor
- ☐ A constraint on where data is stored
- ☐ A data processing agreement is required
- ☐ On your own servers
- ☐ Sign-in through your company directory
- ☐ Poor or no network in some areas

TECHNICIANS' PHONES

SYSTEMS IT WILL HAVE TO EXCHANGE WITH

BUDGET: THE FOUR LINES PEOPLE FORGET

Most comparisons only keep the first one. The other three decide whether a project starts or stalls.

LINE		WHAT TO ASK EVERY VENDOR
1 · The subscription	Per user or per site? Who counts as a user? How long is the commitment?	
2 · Setup	Who enters your assets, your stock and your contracts? Is it included, an option, or your job?	
3 · Training	How many sessions, for how many people, remote or on site, and at what day rate?	
4 · Your own time	How many hours of YOUR team does the project take in the first three months? The most underestimated cost of all.	

ANNUAL BUDGET IN MIND

SETUP BUDGET IN MIND

AN HONEST BENCHMARK

For a team of five people doing the work, a modern CMMS subscription usually lands between **60 and 200 € per month**. If a quote sits far below that, look at what is billed alongside. If it sits far above, ask what you are paying for that others do not offer, and have it shown to you on screen.

The 12 questions to ask every vendor.

Ask all of them, to everyone, us included. Write the answers down: they, not the demos, will tell you who you will still be working with in three years.

- 01 **Who counts as a paying user?** Is someone who only reports a fault billed?
- 02 **Who enters my asset register the first time?** If the answer is "you", ask how many hours, and who will do it on your side.
- 03 **How long between signing and the first job logged by a technician?** Not go live: the first real job.
- 04 **Does the mobile app work with no network?** If yes, ask precisely what works offline and what does not.
- 05 **Can I get all my data back whenever I want?** In what format, at what price, and without having to ask a human.
- 06 **What happens to my workspace if I leave?** How long does the data stay reachable after the contract ends?
- 07 **Where is my data hosted, and who inside your company can read it?**
- 08 **Can I add my own fields?** On which objects, and with what limits.
- 09 **Who answers when something breaks, how fast, and in which language?** Ask for it in writing, not as an intention.
- 10 **What is included in the price quoted, and what is extra?** Updates, support, training, data migration, modules.
- 11 **Can I trial it with my real data before signing?** A trial on demo data proves nothing about your trade.
- 12 **Name three things your software does not do.** The most useful question in this document. A vendor with no answer either does not know their product, or is not telling you everything.

HOW TO READ THE ANSWERS

Be wary of a "yes" with no detail, especially on **offline use**, **custom fields** and **ERP interfaces**: those are the three subjects where the word "yes" covers wildly different realities. Have it shown to you, not described.

Your comparison grid.

Fill it in during the meetings, not afterwards. Three vendors is enough: beyond that the proposals blur together and the decision stalls.

CRITERION	VENDOR A	VENDOR B	VENDOR C
Name			
Covers my "Essential" lines			
Subscription per year			
Setup, all in			
Who enters the assets			
Time before real use			
Requesters billed			
Offline, for real			
Getting my data out			
What it does not do			
My feeling after the demo			

THE FINAL TEST

Before you sign, have them show you **the screen your technician will see on their phone**, not the office one. If you hesitate to put it in their hands, your project already has a problem.

IF YOU WANT OUR READING OF YOUR REQUIREMENTS

Send it to us. We will answer in writing on what we cover, what we do not, and what we would do in your place. No meeting required.

YOUR NOTES

WRITE TO US

contact@maintvision.com
maintvision.com