

FIELD SERVICE MANAGEMENT SOFTWARE 30/60/90 DAY ADOPTION PLAN

A practical plan for your first three months after go-live.

Your field service management (FSM) software launch is just the beginning. The first 90 days set the tone for adoption, workflow consistency, and return on investment (ROI). This plan breaks your rollout into three focused phases, with actions, owners, and success markers — plus common pitfalls to avoid.

	GETTING STARTED 0—30 Days	BUILDING MOMENTUM 31—60 Days	MAKING IT STICK 61—90 Days
WHAT TO FOCUS ON:	Learn and practice the basics: <ul style="list-style-type: none"> • Train each role on the basics • Set up quoting, scheduling, invoicing • Enter all active jobs in the system • Create a simple project hub with links and notes 	Add new tools and improve workflows: <ul style="list-style-type: none"> • Turn on reporting and time tracking • Adjust scheduling and dispatch rules • Integrate key tools (like payroll, accounting) • Clean up data (fix duplicates) 	Fine-tune and expand use: <ul style="list-style-type: none"> • Give access to managers and other users • Add advanced features • Write and share step-by-step guides (SOPs) • Plan for regular system check-ins
OWNED BY	Implementation Lead + Department Heads	Implementation Lead + Ops Manager	Project Owner + Team Leads
IT'S WORKING IF	<ul style="list-style-type: none"> • Almost all jobs logged in the system • Everyone finishes basic training <p>Ask techs and staff: <i>"Is logging jobs easy? Anything slowing you down?"</i></p>	<ul style="list-style-type: none"> • Managers use reports every week • Less manual re-work <p>Ask managers: <i>"Are reports helpful? Do integrations save time?"</i></p>	<ul style="list-style-type: none"> • Jobs finish faster • Quotes are more accurate <p>Ask everyone: <i>"Are guides clear? Where are the bottlenecks now?"</i></p>

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PRO TIPS

- ✓ Take it slow at first — stable basics are better than rushed advanced features.
- ✓ Teach each role only what they need.
- ✓ Keep one central hub for notes, standard operating procedures (SOPs), and links.
- ✗ Don't delay integrations too long
- ✗ Always ask the field team how it's working — they spot real issues early.

Beyond 90 Days

- Keep reviewing goals every quarter
- Meet with your Implementation Specialist or Customer Success Manager to track results and learn best practices
- Have a small team meet monthly to share ideas and fixes
- Update your internal guides regularly
- Share wins with the team (faster quotes, shorter job times, fewer errors)

