

# 7-STEP FIELD SERVICE MANAGEMENT IMPLEMENTATION ROADMAP

A clear, actionable path from planning to long-term success.

Implementing field service management (FSM) software can feel like a big shift — but breaking it into smaller, defined steps makes the process manageable and measurable. This roadmap outlines each stage, who should lead it, and pitfalls to avoid.

STEP	FOCUS	KEY ACTIONS	OWNER(S)
<b>01</b> Build Your Implementation Team	<b>Align processes before migration.</b>	Involve leaders from field, office, finance, and admin. Assign clear roles.	<b>Executive sponsor + project owner</b>
<b>02</b> Map Your Existing Tech Stack	<b>Understand your current systems.</b>	List tools, integrations, gaps, and duplication.	<b>Implementation lead + IT</b>
<b>03</b> Standardize Core Workflows	<b>Align processes before migration.</b>	Unify quoting, job specs, change orders, and comms standard operation procedures (SOPs).	<b>Dept. heads + project owner</b>
<b>04</b> Choose the Right Onboarding Model	<b>Match training to your team.</b>	Decide between on-site, virtual, or hybrid onboarding.	<b>Project owner + FSM provider</b>
<b>05</b> Align Stakeholders	<b>Keep everyone pulling in the same direction</b>	Share goals, timelines, and key performance indicators (KPIs) regularly.	<b>Project owner + dept. leads</b>
<b>06</b> Train and Launch	<b>Phase rollout over 30/60/90 days.</b>	Deliver role-specific training, reinforce workflows.	<b>Implementation lead + team leads</b>
<b>07</b> Review, Refine, Improve	<b>Make continuous improvement a habit.</b>	Gather feedback, run quarterly business reviews (QBRs), adjust processes.	<b>Project owner + leadership</b>



## PRO TIP

Implementation is a process, not a single event. Build in time for **learning, feedback, and continuous improvement.**

