

FIELD SERVICE MANAGEMENT READINESS WORKSHEET

Check your implementation readiness and set yourself up for success

A successful field service management (FSM) rollout starts with preparation. Use this quick checklist to spot gaps and plan your next steps. Whether you're still exploring solutions or already working with a vendor, these questions will help you move forward with confidence.

HOW TO USE THIS WORKSHEET:

For each "Yes," give yourself **1 point**. For each "No," give **0 points** and use the Notes column to jot down what's missing. Add up your score to see your readiness level, then use it to guide conversations with your vendor and plan your next steps toward implementation.

QUESTION	WHY IT MATTERS	SCORE (0-1)	NOTES
Do you have a dedicated project owner?	Ensures accountability and keeps rollout on track.	.....	..... ..... .....
Do your teams use consistent job templates?	Prevents inconsistencies from carrying into the new system.	.....	..... ..... .....
Do you know what data needs to be migrated?	Saves time and reduces errors during launch.	.....	..... ..... .....
Are your technicians mobile-ready?	Smooth adoption depends on comfort with mobile tools.	.....	..... ..... .....
Have you chosen which tools must integrate?	Avoids costly delays and rework during onboarding.	.....	..... ..... .....

SCORING GUIDE:

- 0-2:** Significant prep needed — focus here first to smooth your rollout.
- 3-4:** Mostly ready — close priority gaps to set yourself up for a stronger start.
- 5:** Ready to move forward with confidence.