



How estates teams can effectively transition IWMS/CAFM providers

Playbook

Executive summary

Changing your CAFM or IWMS provider is a significant opportunity to modernise operations, regain control, and eliminate technical debt but it carries risks related to data loss, system downtime, and supplier disengagement. This playbook provides a phased, practical framework for managing the transition successfully.

Key phases of the transition

Phase	Objective
1. Discovery & Planning	Understand current state and define goals
2. Procurement & Selection	Choose the new platform and vendor
3. Data Extraction & Cleansing	Secure usable legacy data
4. Implementation & Configuration	Build and test new system
5. Cutover & Parallel Running	Transition with minimal disruption
6. Go-Live & Support	Stabilise and embed the new platform
7. Exit & Handover Closure	Secure closure with previous provider

Phase one: discovery and planning

Goals

- Define why you're changing provider
- Build the right team and governance
- Set expectations for time, budget, and outcomes

Key actions

- Conduct a needs assessment: what's not working in the current system?
- Form a cross-functional team: Estates, IT, Procurement, Legal, and FM provider (if possible)
- Develop a transition timeline with clear phases and milestones
- Map existing processes, data flows, reports, and integrations

Phase two: procurement and selection

Goals

- Identify a system that aligns with strategic and operational needs
- Ensure technical and commercial fit

Key actions

- Use a structured requirements list (including IT, compliance, and Estates needs)
- Engage IT early to evaluate API, hosting, data ownership
- Run demonstrations and technical workshops
- Evaluate using a balanced scorecard (UX, flexibility, support, TCO)
- Ensure contract includes data export rights, support exit planning, and user licensing clarity

Phase three: data extraction and configuration

Goals

- Retrieve all relevant data from legacy system
- Clean, validate, and prepare data for migration

Key actions

- Request full structured data export (jobs, assets, PPMs, SLAs, user logs)
- Cleanse data: remove duplicates, inactive assets, outdated SLAs
- Agree on data migration mapping with new vendor
- Conduct data QA checks with IT and Estates

Phase four: implementation and configuration

Goals

- Configure the system for real-world use
- Train stakeholders and simulate usage

Key actions

- Design and build core modules: asset management, reactive, PPM, dashboards
- Define user roles, workflows, SLAs, notifications, forms
- Integrate with HR, finance, building access, etc
- Provide training for Estates, FM providers, and internal users
- Conduct user acceptance testing (UAT) with key stakeholders

Phase five: cutover and parallel running

Goals

- Switch from old to new system with minimal risk
- Verify data, processes, and service continuity

Key actions

- Plan a cutover weekend or low-risk period
- Run systems in parallel if possible (1–2 weeks recommended)
- Redirect FM helpdesk or portals to the new platform
- Validate PPM calendar, asset registers, open jobs
- Identify and address issues quickly via daily “hypercare” huddles

Phase six: go live and post go live support

Goals

- Establish steady-state operations
- Ensure issues are addressed and adoption is complete

Key actions

- Keep a dedicated support team (vendor + Estates + IT) for first 30–60 days
- Capture early feedback and optimise reports, workflows
- Monitor performance metrics and user engagement
- Schedule a go-live review after 4–6 weeks

Phase seven: exit and handover closure

Goals

- Ensure all obligations with the old provider are closed
- Protect estate data and ensure regulatory compliance

Key actions

- Secure a final data export/archive from outgoing provider
- Terminate licences and access rights safely
- Document any contractual or exit performance issues
- Ensure legacy system is fully decommissioned or anonymised

Common pitfalls and how to avoid them

Pitfall	Avoidance
Data loss or corruption	Extract early, clean thoroughly, test migration
Missed stakeholder input	Run regular reviews with FM, IT, compliance, end users
Unexpected costs	Clarify licensing model, integration effort, training
Downtime at go-live	Run parallel systems briefly, test heavily
No plan for old system	Include exit planning from day one

Success factors

- **Clear governance** with accountability
- **Cross-functional collaboration** from Estates, IT, and Procurement
- **Hands-on configuration workshops**, not just demos
- **User-driven testing** and staged rollout
- Realistic timelines: typically 3–6 months from contract to go-live

Summary checklist

Task	Status
Define business and technical needs	
Extract and clean legacy data	
Select new platform with IT and Estates	
Build and test new system workflows	
Train users and validate go-live plan	
Go live and monitor performance	
Complete old provider exit and archiving	



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