Construction Management Software Buyer's Guide & Checklist

A step by step guide, helping Head Contractors evaluate today's software solutions.

PROCORE

Introduction

Historically, our multi-billion dollar construction sector has been slow to adopt new technologies. Many businesses still rely on spreadsheets or a variety of disparate systems to manage projects.

Construction is now transitioning from an almost 100% reliance on paper-based processes to digital transformation.

In a recent survey of over 750+ construction leaders across ANZ, nearly half of respondents said they are looking to increase their spending on technology – but the research also suggested that many of these leaders are caught in 'analysis paralysis'. They are investing in shiny new tech before focusing on the fundamentals, or they are caught on issues they can't control and ignore those they can.

It can be difficult to know where to focus your technology investment. Maybe you know of a great solution in the market to solve specific issues in planning? Or design? or procurement? There are hundreds of different solutions out there that may solve a single aspect to one of your various challenges.

However, when you keep creating disparate solutions, many construction businesses are left with a colossal tech stack of multiple, single-solutions that don't integrate with one another. This can create a whole new set of problems:

- Disparate data that is being collected from different softwares
- Documentation that requires double entry from software to software
- Multiple sign-ins across a suite of apps with different logins
- Wasted time and increased admin trying to use multiple sources of data to inform decisions.

So how do you know which software solution is right for you?

This guide is designed to walk you through a comprehensive overview of important buying criteria to consider when evaluating different software applications. It's also equipped with key aspects to look for when you start narrowing down potential vendors **to ensure you select the best construction management solution for your unique business needs.**

This includes:

+ Tips on how to identify your needs
+ How to evaluate the software company
+ Functionality aspects to assess
+ Checklist of features to look for

Chapter 1: Where You Are Now vs. Where You Need to Be

- Determine Pain Points and Objectives for Stakeholder Alignment
- Prioritising Pain Points
- Gain Stakeholder Alignment

Chapter 2: Does your evaluation criteria align with your objectives?

- Point Solution or Platform?
- Feature Checklist for Construction Software

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— CHAPTER 1

Where You Are Now vs. Where You Need to Be

Before you begin researching potential software solutions, you need to define who needs to be involved in the decision making. Next, you'll analyse the current processes you have in place to help you pinpoint areas that can be improved with construction management software.

Determine Pain Points and Objectives for Stakeholder Alignment

Successful software selection starts with defining your business's current gaps and needs before you evaluate any potential partners. An excellent place to start is outlining what creates inefficiencies and lack of visibility – duplicate data entry? Challenges tracking down project information and statuses? Questionable data output?

Once you've outlined the pain points, prioritise them. Which ones create the most inefficiencies across teams? Which areas impact team communication, damage client trust, or even the ability to know what is happening within your portfolio? Are any of these pain points introducing schedule or budget risks to your organisation? Or hindering your ability to make informed decisions?

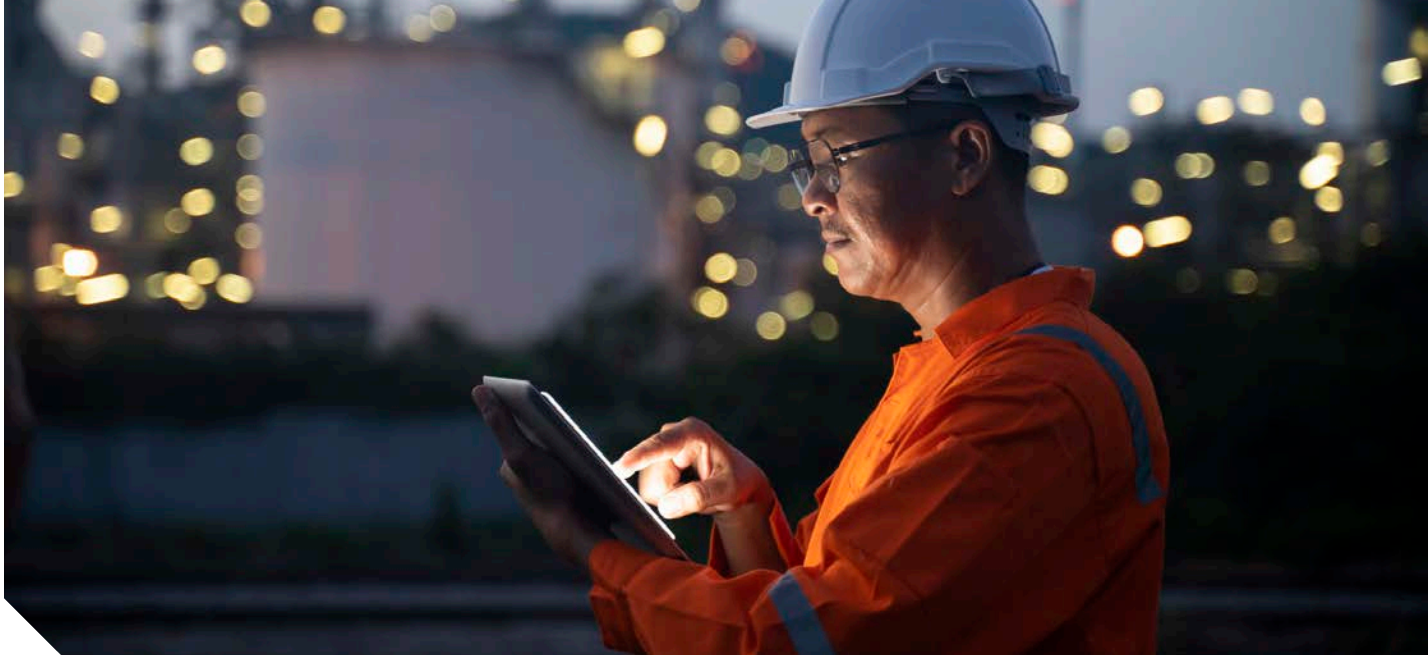
To ensure you are selecting the right software, be explicit about what problems you expect the technology to address.

Common pain points include:

- Lack of visibility into the financial health of your portfolio
- Business functions are manual or require using multiple, siloed systems
- Lack of reporting capabilities across multiple data sources
- No central repository for documents
- Dealing with outdated information
- Lack of visibility across your project portfolio
- Low user/employee adoption of existing tools
- None of the existing tools integrate or talk to each other
- Key stakeholders lack access to solutions due to limited user licences

“We didn’t have a core-connected platform. Everything was created in different software solutions on an ad hoc basis. There was no standardisation to what we did, and we were very reliant on people, rather than a core system that should be connecting a growing team across multiple locations.”

–Peter Clark, Chief Financial Officer, CSI Group



Prioritising Pain Points

Prioritising pain points will help keep your search focused and prevent key evaluation criteria from becoming too broad and unmanageable.

Number 1: Identify the problem.

Number 2: Rank your goals and criteria. This will help you weigh the different solutions you evaluate.

Gain Stakeholder Alignment

This is a critical step to ensure the right people are involved in the search–sometimes, this step comes before even identifying objectives and pain points. You might connect with **end-users (both site and office staff), IT, security, software administrators, finance, procurement, engineering leads, construction executives,** and other necessary stakeholders to help you evaluate the software with multiple use cases in mind.

Starting with a business case can be helpful to get buy-in and support that a solution is needed—it also serves as a vital roadmap for evaluating solutions and ensuring the purchase will align with your strategic vision.

— CHAPTER 2

Does your Evaluation Criteria Align with Your Objectives?

Now that you've determined the problems you want to solve, consider what features do you need from software in order to achieve those ambitions. Start high-level, then get more granular. Think about which features would have the biggest impact on the business. Which are essential versus nice-to-have?

Remember, one of the biggest features is usability. Many solutions may be able to check all the boxes you lay out, but it is important to have the end users put their hands on software to confirm your team will actually adopt it. Remember, you shouldn't mould your business to fit your software solution, it should mould to fit your business.

> **A good mantra to keep in mind is that a good solution should remove work, not add to it. If a vendor is not able to let you put your hands on the system in some capacity before buying, that is a big red flag.**

Point Solution vs Platform?

Singular-focused solutions, or point solutions, only address one problem without regard to related issues. Therefore, many find themselves buried by the sheer number of software products needed to manage the multiple facets of a single project. **As a general rule, you should limit the total number of applications your staff has to learn and use every day. There may still be some point solutions in your overall tech stack for specialised purposes. However, to limit the app fatigue for** your staff, you should try to find solutions that integrate on a common platform to limit data silos.

Feature Checklist for Construction Software

Some of the most desired features in construction software platforms are listed below. Decide if this is a 'Must have', an 'Ideal' to have or 'Not important'

☑ Connect all of your collaborators

Eliminate the site-to-office divide by bringing all of your collaborators together with, make sure the software offers third-party integrations so that you have the freedom to continue using it. That way, if you do decide to expand your toolset, all data will be in the same integrated solution.

☑ Connect all of your applications

Integrate solutions together, seamlessly reusing information created in one application to populate data fields in other applications

☑ Open API & Integrations

Allows you to easily connect additional applications to your existing system at any point.

☑ Unlimited User software licences

This model is ideal for giving all project collaborators—including specialty contractors, consultants, and third parties—access to the software.

☑ Mobile Functionality

Fully functioning, native mobile applications to maximise project efficiency. The latest project documentation should be available 24/7.

☑ Offline Accessibility

Since many job sites do not have WiFi throughout, various project management tasks need to be achievable offline.

☑ Reporting & Analytics

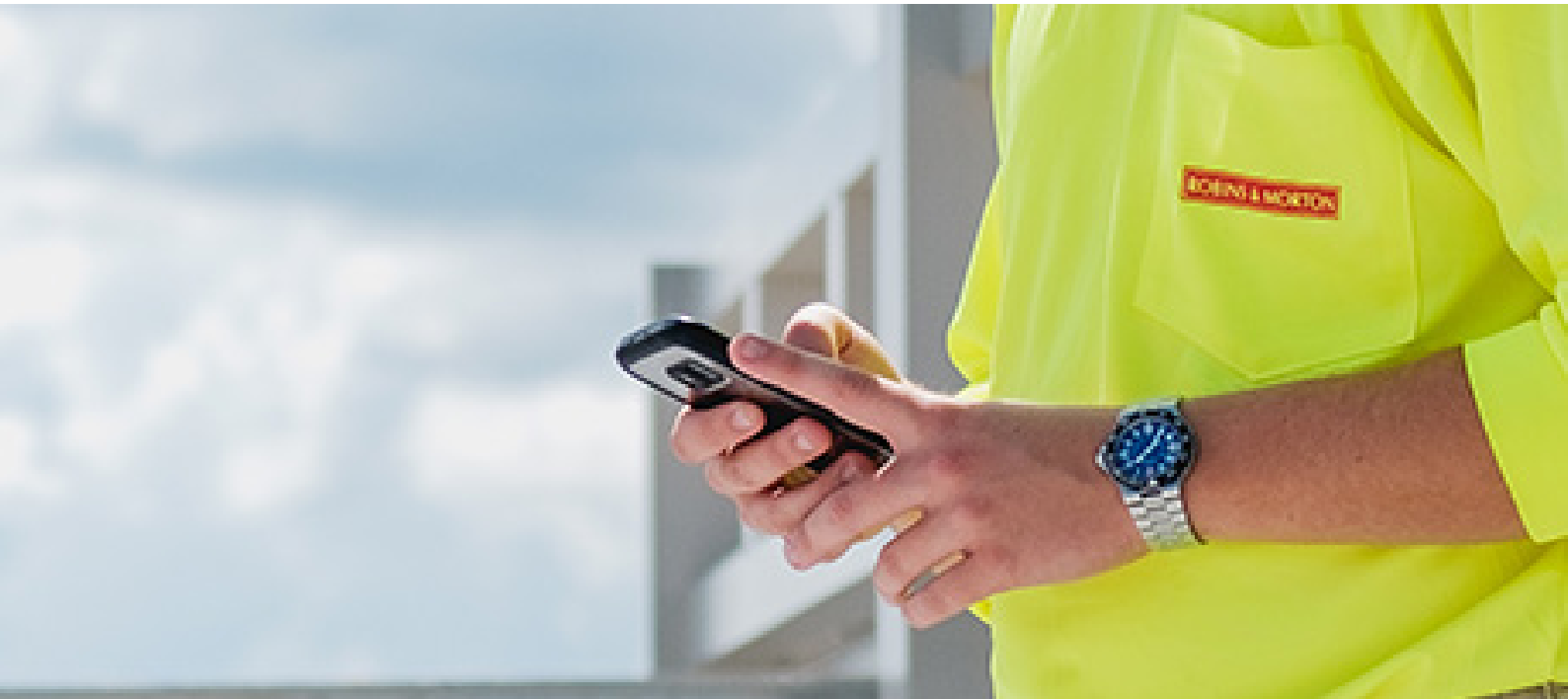
Streamline, aggregate, and report on data flow between people, companies, systems, devices, and software applications.

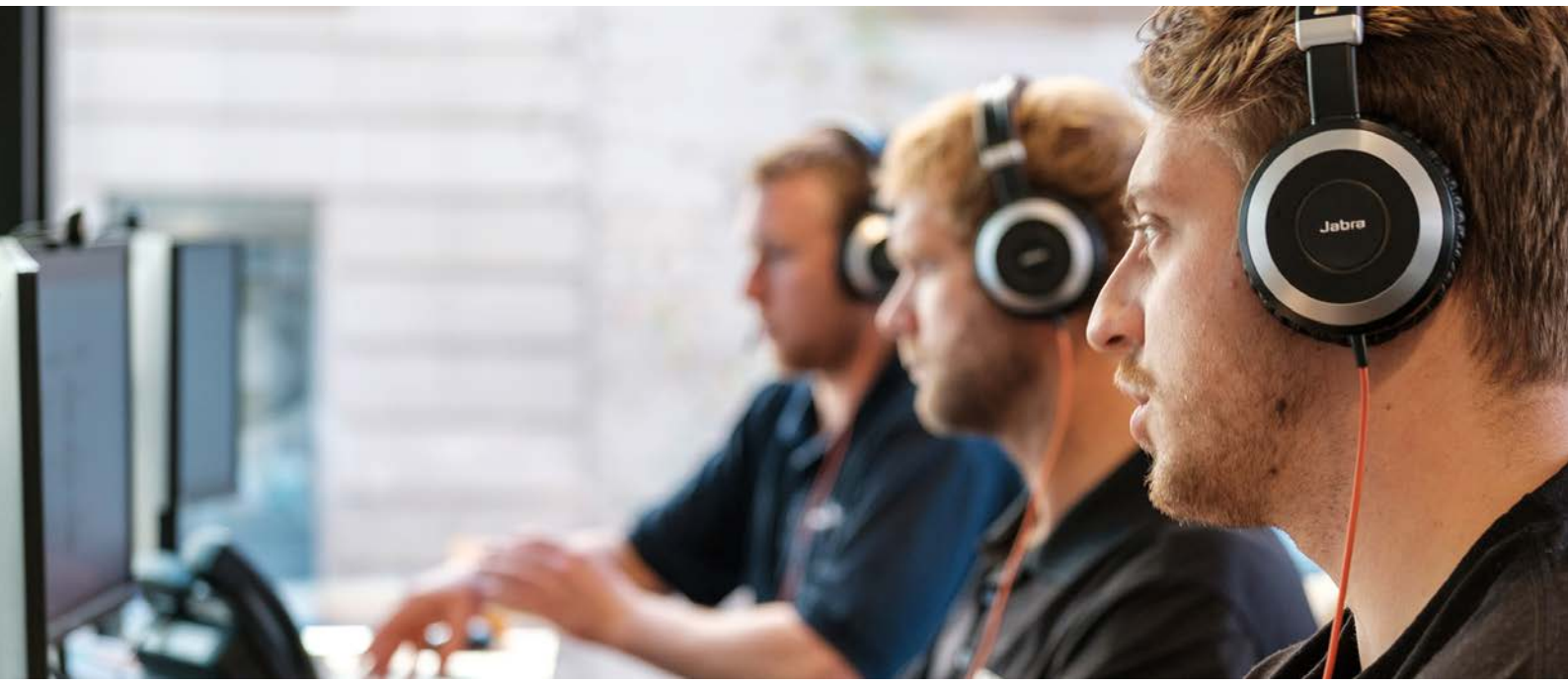
☑ Security

Saa vendor dedicated to providing you with the highest degree of service including security, availability, and privacy of your data. Including 3rd parties to review their Information Security Program (Penetration and Vulnerability Testing).

☑ Data Ownership

Ensure there is a clause in your SLA that states unequivocally that you own your data.





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Vendor Evaluation: Picking the Right Partner

Take a step back to ensure you've now conducted an honest assessment of your company's requirements and the features you need. It's now time to create a shortlist of vendors dedicated to supporting your organisation for the long haul.

Expand your requirements beyond a product standpoint to consider the reputation, development, and growth of the software company.

Here are some aspects and tips —outside of features and functionality—to keep in mind when considering a software partner.

Considerations before purchase

Ease of Use

Every aspect of the software needs to be intuitive in design so users instantly know how to use it for their needs with minimal to no training.

Tip: Study the software interface and workflow to judge how easily it can be incorporated into daily workflows, as well as how seamlessly it integrates into the rest of your tech stack. **A good indicator of software usability is time to value. Look for software with an implementation timeline measured in weeks.**

Implementation & Adoption

With continual software updates, new functionalities, you need resources dedicated to keeping your staff up to speed. Consider ongoing free educational offerings such as:

- Support documents
- Training webinars & certifications.
- Onsite training

Tip: Look for companies that go above and beyond traditional onboarding processes like kickoff calls and training documentation. Seek out providers that offer ongoing software education for all of your users throughout the lifetime of your license.

Technical Support

Every vendor has world-class support during the sales process, but that may not be the case after you've signed a contract. You need to be able to have your teams' questions answered in a timely and efficient manner.

Tip: Check support is on-demand either via email, chat, or phone (or preferably, all three) and should be included for anyone with a login, whether or not they work at your company—not to mention free.

Scalability

No one wants to test, deploy, and customise software only to find out a year later that you have outgrown it and need to replace the solution. Consider your company's 3-5 year growth plans and make sure you're selecting a partner that can support you in the long term.

Tip: Seek out software that is constantly improving with new features and product updates. This is another advantage of cloud-based systems—you receive product updates seamlessly without having to purchase the latest version of the software or new licences.

Product Development

Software that relies on customer feedback for development has a very unique advantage of responding to your business more quickly, resolving universal system issues from a single code base, and soliciting feedback on platform enhancements.These platforms remain ahead of their competitors with respect to product advancements due to a focus on culling customer feedback and incorporating it into the development roadmap.

Tip: Ask the vendor if/how they collect feedback from customers, and how they use it. Make sure the solution you choose does not make you pay to receive product updates and enhancements

Reference Check

When you're trying to manage deployment risk, there's nothing more comforting than knowing you're not the first organisation to implement the specific configuration you're planning. Customer testimonials speak volumes about a vendor's viability, as customer satisfaction is often a clear indicator of long-term success.

Tip: Pick up the phone. Ask your vendor for a handful of referenceable clients of similar size and sector that you may speak to about their experiences working with them.

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Investment vs Expense

One of the biggest reasons for assuming an inadequate return on your software investment is by inaccurately comparing it to the cost of the systems being replaced and the amount that can be reimbursed by your clients.

The software needs to be viewed as an enabler of business processes that delivers strategic value, not just an IT purchase.With an integrated platform capable of managing all aspects of a project, the value is far beyond a dollar amount you can tie to something like saving printing costs by digitising drawings. It includes everything facilitated by the software—such as safer job sites from new visibility into near-misses or improved employee morale leading to better employee retention due to a reduction in administrative tasks.

Some general benefits gained from implementing construction management software include, but are not limited to:

- Lower IT
- Increased efficiency & productivity
- Predictive analytics
- Better recruiting
- Improved forecasting
- Visibility into the health of project portfolio
- Reduced rework
- Leaner staff
- Reduced internal training staff
- Safer job sites
- Faster project delivery
- Reduced irisk of litigation
- Talent retention

It can be difficult to apply a blanket pricing structure when categorising their offerings. Make sure the price you receive includes implementation and training and customer support for all software users—including external stakeholders and that there are no hidden fees.

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Where to Go from Here

Selecting a software partner is a huge undertaking, so take your time evaluating and comparing vendors. Conducting the proper research and gathering all the feedback will pay huge dividends in the end. You'd much rather have a long evaluation journey to pick the right partner than select the wrong vendor and go through a laborious implementation—only to find out you selected the wrong software and have to start your search all over again.

Present Your Partner of Choice

Now it's time to formalise your findings and present your partner of choice to your decision-makers with a proper business case. Update your initial business case for construction software with the findings from your research to support why your software partner is the best on the market for your business.

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