

EBOOK

How To Buy A Construction Management Platform

PROCORE®



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You already have enough unknowns on the construction site. Profit margins shouldn't be one of them.

Too often, manual processes and busywork take up the majority of your staff's time. Clunky systems, overwhelming document storage systems, and unreliable servers not only inhibit productivity and efficiency, but they also create easily avoidable safety risks.

In today's fast-paced industry, businesses can no longer afford to rely on slow paper-based systems and spreadsheets. Using a construction management solution makes it easier for teams—both on and off site—to have all the information they need at their fingertips. It provides teams with accurate, real-time project information so they can make better decisions, more quickly, and at a lower cost. That means fewer surprises and less rework, ultimately leading to higher margins.

Knowing the key features to look for—and equipping yourself with the right questions to ask—can help you navigate the decision-making process and reduce the risk of ending up with buyer's remorse.

IS THIS GUIDE RIGHT FOR YOU?

This guide provides a helpful framework for choosing the best solution that fits your company's objectives and goals. This includes:

+ Tips on how to identify your needs
+ Functionality aspects to assess
+ Specific tools and features that should be included
+ How to evaluate a platform

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Self-Assessment and Goals

Before you begin researching potential solutions, you first need to have a thorough understanding of your current processes. This will help you pinpoint areas of improvement that a construction management solution can help solve.

1. **Define the challenges**

   Work with your site teams to list their current pain points and needs, and prioritise them in order of importance. Imagine your perfect work day and the tools that would help make it possible.

2. **Get the big picture**

   Consult widely across your business—including project managers, site managers, safety managers, IT, accounting, executives, etc.—about pain points and opportunities for improvement. Involving both project-based and back-office personnel in identifying challenges early on helps achieve buy-in. It also allows teams to get a feel for the solution and will help manage expectations down the road.

3. **Define what type of solution you need**

   Using generic solutions that can be applied to any industry is rarely effective. Construction has specific needs, and any solution that you use should be built for the industry.



4. Consider your growth

When compiling the list of your needs, consider what the future may hold. You don't want to end up with a solution that can't deliver in two or three years' time.

5. Demo the solution

Make sure you see solution demonstrations, not product demonstrations. Product demonstrations show flashy features and functions of the software that may have little to no relevance to your needs. If possible, have the software demonstrated on the construction site and on devices similar to what they use, so that they can see it working in real time.

6. Create a cost-benefit analysis

Securing buy-in from all departments can be a challenge. One way to encourage others to see the value of a new solution is to demonstrate a clear return on investment. A cost-benefit analysis answers questions such as:

+ If you are not yet using a construction management solution, how long does it take to perform administrative tasks with pen-and-paper processes?
+ What are the associated costs for items like change orders and RFIs?
+ How much time do you spend making sure your site team has the latest project drawings and specifications?
+ How long does it take to compile a safety report?
+ How much time do you spend going from the site to the office to document or relay information?
+ What are the current expenses associated with all these manual tasks?
+ If you're already using a construction management solution, how much time is wasted due to poor customer support?
+ How often is communication restricted by a per-seat user license model?
+ How much time and money will be saved by switching to a new system?

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Construction Technology Platform Basics

When businesses are looking to replace manual processes with greater efficiency, they'll typically do so in one of two ways: using a platform or multiple point solutions.

The benefit of leveraging a platform is that you have the ability to house all projects, financials, and resources in one centralised location. Platforms enable businesses to connect processes in a single system, bringing together information and teams for greater communication, productivity, and efficiency—while integrating with third-party tools. From project management to financial management to resource management, only a platform creates a single source of truth.

In contrast, point solutions solve only one business need. That means you'll have separate solutions for various needs—one for accounting, one for scheduling, and another for reporting. This results in a complex assortment of solutions that are not integrated, scattering data in multiple locations. As a result, point solutions complicate day-to-day tasks and prevent teams from gaining a holistic picture of performance.

When researching potential platform candidates, consider the following criteria to narrow your choices and ensure the solution is right for you.

> "Platforms have a major role to play in how businesses operate in the future. Just like the introduction of machines and the first wave of computing, early adopters stand to gain while laggards will suffer under legacy thinking and technology. The more people and processes that can be brought online on one network and on one platform, the greater the business benefits will be."
>
> **FORBES**

User-Friendly Tools

A construction management solution is only as useful as it is easy to use. Using clunky systems or tools that don't work for both site and office teams will result in low employee buy-in. As soon as your team gets their hands on a new solution, it should start solving their problems, not creating them. Make sure the solution is intuitive, user-friendly, and has mobile capability. The most expensive decision you can make is choosing a solution your team won't use.

Unlimited Users

Your construction management solution is an investment in the success of your business. The cost of a construction management platform varies based on the type of licensing model, how your solution is deployed, and the internal skill set required for supporting it. Based on the cost implications, unlimited users for a fixed rate offers the best scenario for collaboration and expansion.

		UPFRONT INVESTMENT	LONG TERM INVESTMENT
PER SEAT LICENSING	Price is based on the number of individual users who have access to the solution. Since many team members will not likely have a license, this model inhibits communication across teams and can get expensive as your teams and/or projects grow.	↓	↑
UNLIMITED USERS	Unlimited users for a fixed monthly or annual rate. This allows businesses to authorise an unlimited number of users for concurrent login privileges including employees, clients, architects, designers, subcontractors, and any other stakeholders. This model is ideal for improving project collaboration and communication.	↑	↓

Mobile Applications

Because construction takes place on site and not in the office, your software needs to have powerful mobile capabilities to maximise project efficiency. With mobile access, teams can view real-time specs and RFIs anytime, anywhere—without a trip to the portakabin. Instead, they have the power to review, edit, and share up-to-date project information in a matter of seconds—regardless of their location.

Integrations

With platform integrations and an open API, you can extend the value of a software platform to address any of your specific business needs. Connecting your systems helps reduce the risk of double entry and inaccurate data—without needing to juggle multiple apps in separate locations—while also giving you the freedom and flexibility to grow and change. Plus, if you decide to expand your toolset, all data will be in the same platform.

Offline Accessibility

Between basements, attics, and WiFi-free zones, the whereabouts of your site team is never certain. Your documents need to be accessible no matter how strong or weak your connection is. Leading solutions will offer offline access to project data and sync all changes made offline once back online.

Customisation

Multiple project managers may have different strategies on how they want to run and understand their projects. That's why it's important to have a solution that standardises processes while still giving project managers flexibility. More advanced solutions offer customisations for workflows, templates, integrations, and reporting. Make sure you work with your construction management partner to determine your customisation requirements before purchasing a solution to avoid unanticipated costs.



On-premise vs. Cloud Server

If you're thinking about storing data on office computers or servers, think again. The total cost of ownership alone is enough to question the ROI of this decision. On-premise servers limit accessibility to project data and inhibit the communication required for timely decision-making and judgment calls. Plus, one virus or hard drive crash and your data could be gone in seconds.

You need seamless project collaboration, accurate data, and around-the-clock accessibility for teams both on and off site. For these reasons, and the ones listed below, cloud-based solutions win the battle against on-premise servers.

UPFRONT INVESTMENT	LONG TERM INVESTMENT
License solution and run it on your own servers. Be sure to account for any hidden fees and operating expenses associated with deployment, support, customisation, integration, maintenance, and upgrades.	**Subscription-based licenses that are centrally hosted.** Cloud-based solutions can reduce IT support costs by outsourcing hardware, solution maintenance, and support to the SaaS provider.
Expensive to maintain. With hardware and software, hidden fees like data migration, installation, training, hardware rental, and upgrades become costly.	**No maintenance cost.** Since cloud-based solutions requires no hardware, there are no costs associated with installation or maintenance.
Time-consuming setup. Installation and implementation of on-premise servers can take weeks to months.	**Fast and easy deployment.** Cloud-based solutions can be implemented with active users in a matter of days.
Limited storage. Upgrades can be costly and many times IT companies require their clients to upgrade software and even purchase new computers to maintain compatibility with required updates.	**Infinite storage space.** Cloud-based software offers more storage space without the hassle of upgrades and additional servers as businesses scale or require more data storage.
Complicated accessibility. Dedicated servers typically only support certain operating systems and tend to have compatibility issues with older solutions. Additionally, installed solutions are only available on the computer where they were installed.	**Flexible accessibility.** Cloud-based tools.



Data Ownership

It is important to ensure that you own your own data and can obtain a copy of it at any time. That way, you can provide information to the client or other stakeholders throughout the project. You'll also want an agreement for appropriate assistance in migrating away from the vendor should you ever decide to leave. Many software companies control their clients' data, so it's important to investigate before making a decision.

Security

Storing data in the cloud means that your project information is safe and secure with role-based permissions, data encryption, and secure authentication. What's more, physical security measures for cloud-based systems are much higher than on-site server rooms; the servers are backed up on multiple servers, in various physical locations, with high-level security measures in place. Special sources of power and backup generators provide additional disaster security and stability.

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The Benefits of a Construction Management Platform

Whether you're working on a single project or hundreds, a centralised, secure, real-time construction management platform can transform your business. Look for a solution that will evolve with you and your projects to help future-proof your firm.

Project Management

By creating a central repository for all your project and business documentation, you'll help ensure faster document access while also mitigating future risk. Leading solutions allow you to correlate supporting information—drawings, specs, photos, and more—for easier project management.

+ **Drawing management** - unlimited secure storage, user permissions, version control, and comparison tools
+ **Document management** - unlimited secure storage, quickly view and share documents from anywhere, link to related items, manage documents from any device
+ **Photograph management** - includes mobile camera integration (take a photograph and rapidly share it across the team)
+ **Email management** - synchronise with Gmail and Outlook, track and archive all project emails
+ **Meetings management** - organise meetings, manage agendas, minutes, and action lists
+ **Schedule management** - integrate with MS Project or Primavera, share programmes, tasks, and their status
+ **Time management** - daily site diary and timesheet features that integrate with users' individual schedules and payroll, and provide instant reporting on labour productivity
+ **Workflow management** - support for construction-specific processes and all associated forms and documents, including requests for information (RFIs), technical queries (TQs), submittals, specifications, and snag lists
+ **Tender/bid/RFQ (request for quote) management** - create tender package information, communicate with bidders, and ensure secure submission and evaluation of proposals



Health, Safety, Quality, and Environmental Management

Efficient management of health, safety, quality, and environmental standards is critical to successful construction project delivery. The best construction management solutions will help you comply with regulatory requirements, while also providing powerful reporting tools to support continuous performance improvement. Some project management features will contribute to compliance, but be sure to also look for some dedicated HSQE functionality.

+ Incident documentation - create injury and near-miss records to help identify and minimise risks, take preventative actions, and improve reporting and safety management
+ Inspection management - create and maintain a library of inspection forms, identify instances of non-compliance, and manage how problems are resolved
+ Observations - enable mobile capture and reporting on deficient working issues (incorporating, as necessary, photos, drawings and/or supporting documents), rapid reporting on issues and trends
+ Snag lists - create snag list items (even offline), associate with relevant drawings or documents, and monitor by zone, company or status (open or closed)

Financial Management

As construction firms often work on tight schedules and even tighter budgets, accurate and timely management of budgets can be critical to profitability. Change is almost inevitable, so you will need to be able to capture variations and keep revised programmes, budgets, and contracts aligned. Some project management and HSQE features may be deployed, but it pays to choose a tightly integrated construction management platform that will keep your finances on track.

+ **Budget management** - create (or import) project budgets and forecasts, track detailed expenditure against budget line items, and provide detailed reporting on financial performance by work package, project, and/or across multiple projects
+ **Contract management** - track and distribute contract and subcontract documents, purchase orders, variations and payment applications; monitor payment progress
+ **Change management** - capture changes as they arise, estimate the rough order of magnitude (ROM), identify if change is in/out of scope, and monitor progressive impacts of change for clients and/or contractors
+ **Cost management** - track invoices and expenses, whether committed or non-committed, and provide authorised users with visibility of payments

Building Information Modelling (BIM)

Building information modelling (BIM) demands a well-structured approach to data management throughout project delivery including visibility of who does what, where, when, and at what cost. This transparency may be evidenced through other construction management platform features, but when efficient BIM deployment is required, it pays to have integrated BIM functionality. The most advanced platforms will also give field teams access to 3D coordinated models—enabling them to gain full insight into coordination issues so they can resolve issues early in the design phase.

+ **Common data environment** - deploy an information management platform that can be integrated as part of a CDE (an ecosystem of tools used to deliver BIM-enabled projects)
+ **Model viewing** - be able to view federated 3D models and associated outputs on any device; ascertain the status of models in relation to project schedules and budgets

Reporting

Your construction site produces a gold mine of data each day. With integrated solutions, you'll be able to accurately report on how teams or projects are performing in real time. In doing so, you'll be able to identify potential risks and use supporting data to tackle those issues head on.

+ **Custom reporting** - as well as system-standard reports, quickly generate company, project or client-specific reports tailored to your immediate information needs
+ **Third-party reporting** - particularly where project executives or owners may not have access to the construction management platform, export data to a PDF, Excel, or CSV file.
+ **Report dashboards** - in a hyper-connected world, real-time reporting across any device is increasingly demanded and helps accelerate timely decision-making



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Platform Implementation and Support

The planning, implementation, and customer support that comes with it will play a critical role in ensuring success.

Implementation

A good indicator of a great product is the time it takes to train, implement, and deploy on site. Your new solution should have a fast time to value. Otherwise, lost productivity in the early stages of adoption could foreshadow problems you'll run into in the future. If it takes six months to a year to implement and begin training, there's a high chance the solution is not intuitive or easy to use. Look for a solution that offers a clear implementation strategy including measurable goals, action items, and timelines that can be implemented quickly.

Customer Support

Poor customer support translates to more down time on construction projects. Your questions need to be answered in a timely manner in order for the solution to contribute to, rather than inhibit, your project's success.

CONSIDER QUESTIONS SUCH AS:

+ Is the support UK-based?
+ Does the solution use a third party that also sells their competitors' software?
+ What is the customer support team's average response time?

You want construction technology experts that know the solution better than anyone else and can solve your problems quickly. Also, ensure your software has in-product support including access to a comprehensive library of self-service help documentation and live chat with product experts. This will ensure that users of the solution are able to solve problems and build their own knowledge quickly, without having to request support and wait for responses.

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Company Evaluation



When considering a solution, it's just as important to look at the product as it is the reputation and development of the company.

References

Customer testimonials speak volumes about a construction technology partner's viability, as customer satisfaction is often a clear indicator of long-term success. Read solution reviews and case studies. Be sure to talk to current customers using the solution, and include individuals from both the office and site teams—project managers, safety managers, financial officers, foremen, and project engineers. Look for answers to the following questions:

+ **Implementation.** How long did it take?
+ **Solution performance.** How well does the solution work, has it met expectations, and what kind of value have you derived?
+ **Uptime and reliability.** Is the system always available when you need it?
+ **Usability.** Are the features and functions easy to navigate, and are your users able to get up and running quickly, or was extensive training required?
+ **Support and responsiveness.** How quickly does the vendor respond when you have a problem, and how knowledgeable and helpful is their service team?
+ **Functionality.** How comprehensive are the features, and how often are new capabilities introduced?



Investment in Research & Development

You don't want the solution you just purchased to be outdated by next year and have to wait for the next upgrade to see enhancements. When customers have questions or concerns, it's vital that the vendor spends the time to understand the root of the problem. Seek a provider that prioritises the development of new features and improvements with user groups and events that invite customer feedback. Ask about the future 'product roadmap' so that you can ascertain its future fit for your business and its projects.

Seek out solutions that are 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 solution or new licenses. Make sure the solution you choose does not make you pay to receive product updates and enhancements.

Scalability

No one wants to test, develop, customise, and train on a solution only to find out a year later they have outgrown it and need to replace the solution. Scalable solutions can easily grow with your business, at minimal cost to you. Factors that can inhibit the ability to scale include customisations, number of users, current database structure, and inputs and outputs like reports and connectivity to your other database systems.

Say goodbye to buyer's remorse.

There are countless solutions on the market touting 'best-in-class' construction management, so it can be a challenge to identify the right one for your business.

To help drive long-term success, be sure the solution meets the following criteria:

+ Consolidates data in one unified platform
+ Includes the right integrations for your business
+ Offers unlimited users, unlimited data, and unlimited support
+ Boosts site-to-office connectivity
+ Provides a clear product roadmap

Taking a look at your current processes and equipping yourself with the right questions is the first step towards evaluating the solution that best fits you and your team. Learn how Procore's single construction platform can boost your efficiency and minimise risk at procore.com/en-gb



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Procore manages your projects, resources and commercials from project planning to handover. Our software platform connects every project contributor to solutions we've built specifically for this industry—for the client, for the main contractor, and for the subcontractor. Our App Marketplace has over 150 partner solutions that integrate seamlessly with our platform, giving you the freedom to connect with what works best for you, even if we don't build it. The ability to easily communicate across disparate teams makes it easier to work together by eliminating silos and establishing a single source of truth. It's how Procore gives your team access to everything they need to know to get their job done.

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