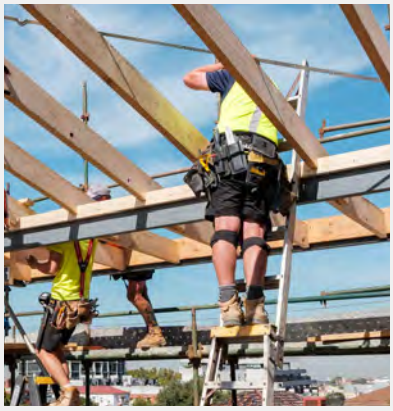
EBOOK

Construction Management Software Buyer's Guide for Home Builders

PROCORE®

Contents

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



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

You're working too hard to let inefficiencies slow you down. Gaining control of your projects is a matter of replacing these tedious manual processes with construction management software. With streamlined communication, powerful data, and real-time insights, you can spot trends, inefficiencies, and potential risk areas to make better data-driven decisions. It will also help you cultivate a winning reputation to bring in more business. With the right solution, you'll have no more surprises and less rework—and ultimately, higher margins.

Is this guide right for you?

This guide is designed specifically for home builders looking to improve their construction management processes. It will help you build a framework for choosing the best construction management solution that fits your business objectives and company goals. Whether you focus on a few projects a year or hundreds, these are the key features and functionalities to look for in construction management software.

This guide includes:

- Tips on how to identify your needs
- Functionality aspects to assess
- Specific tools and features that should be included
- How to evaluate the software company

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How to Find Your Perfect Software Match

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

Step 1: Build your software purchasing team

The best way to implement change within your business is to include your field teams in the decision-making process and manage their expectations. This allows them to get a feel for the software to better understand whether the solution is easy to use and if it will help manage internal processes more effectively.

Step 2: Identify your daily procedures and current pain points

Analyse your daily capabilities and workflows. Then identify the areas where current and future business needs are not being met. Consider the systems you are using––Excel, email, point solutions, etc.––and identify ways those processes would improve with a centralised system.

Step 3: Create a list of your main challenges and pain points

Compile a list of the challenges your team has in their daily tasks. Imagine your perfect work day and the tools that would help make it possible. Then, separate the "must haves" and the "nice to haves."

Step 4: Clearly identify your goals and objectives

Consider the investment of a long-term solution versus the cost of a short-term fix. You want to choose a system that can serve your needs now and in the future. Keep in mind that although you may not currently need every feature the software offers, you may want it at a later date.

Step 5: Demo the solution, not the product

Product demonstrations show flashy features and functions of the software that may have little to no relevance to your needs. You want a solution demonstration that clearly illustrates how the software eliminates your pain points and improves your relationship with clients and subcontractors.

Step 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 software solution is to demonstrate a clear return on investment. A cost-benefit analysis answers questions such as:

+ If you are already using a construction management solution, how often is communication restricted by a per-seat user license model?
+ How much time is wasted due to slow customer support?
+ If you are not yet using construction management software, how long does it take to perform administrative tasks with pen-and-paper processes?
+ What are the associated costs for items like variations 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?
+ How much time do you spend on manual invoicing?
+ What are the current expenses associated with all these manual tasks?
+ How much time and money will be saved by switching to a new system?

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What to Look for in a Software Solution

There are countless software solutions out there on the market. How do you know which one is best for your business? When researching candidates, consider the following to narrow your choices and assess whether or not the software is right for you.

User-Friendly Tools

A software solution is only as useful as it is easy to use—and that doesn't mean just for office teams. Using clunky systems or tools that don't work will result in low employee buy-in, especially from site teams, which will defeat the point of getting the software in the first place. As soon as your team gets their hands on new software, it should start solving their problems, not creating new ones. 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

Don't make the mistake of seeing your construction management solution purely as an expense. With the benefits of increased efficiency and productivity—not to mention higher margins—implementing the right solution is an investment in the success of your business.

The cost of construction management software varies based on the type of licensing model, how your software is deployed, and the internal skill set required for supporting the software. Based on the cost implications, unlimited users for a fixed rate offers the best scenario for collaboration and expansion. Each model is broken down below.

	Upfront Investment	Long Term Investment
Per Seat Licensing Price is based on the number of individual users who have access to the software. 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 Other solutions offer unlimited users for a fixed monthly or annual rate. By paying an annual fee, clients are free to authorise an unlimited number of users for concurrent login privileges including your employees, clients, architects, designers, subcontractors, and any other stakeholders. This model is ideal for improving project collaboration and communication.	↑	↓

Mobile Applications

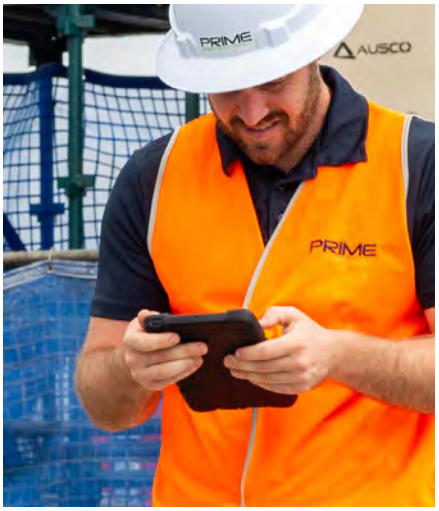
Because construction takes place on the jobsite and not in the office, your software needs to have powerful mobile capabilities to maximize project efficiency. With mobile access, teams can view real-time specs and RFIs anytime, anywhere–– without a trip to the trailer. They no longer have to rely on outdated and slow virtual private networks (VPNs) to manage and collaborate on construction projects. Instead, they have the power to review, edit, and share up-to-date project information with others in a matter of seconds.

Freedom of Choice

Point solutions only address isolated business needs one at a time and often don't integrate with one another. They can also leave you with a collection of tools that are not relevant to your team's specific needs. You need software that allows you to select the products that solve your problems with the option of adding more at any time as your company grows. If you already have an accounting or timekeeping solution that you're comfortable with, make sure the software offers third-party integrations so that you have the freedom to continue using it.

Integrations

With software integrations, you can extend the value of a platform to address any of your specific business needs. Not only will connecting your systems get rid of the risks of double entry and inaccurate data, but it gives you the freedom and flexibility to grow and change––without the need to juggle multiple apps in separate locations. Plus, if you decide to expand your toolset, all data will be in the same integrated solution.



Streamlined Payments

Minimise financial risk and lower costs with paperless invoicing. The solution you choose should streamline the collection, review, and submission of monthly invoices so that your team gets paid for the work they do—faster. They should have all the details they need from start to finish, without additional phone calls, emails, and wasted time.

Offline Accessibility

Between basements, crawl spaces, 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. Best-in-class software offers offline accessibility to project data and synchronises 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. Most solutions offer customisations for workflows, templates, integrations, and reporting that come at an additional price. Make sure you determine your customisation requirements before purchasing software to avoid unanticipated costs.

Actionable Insights

Your jobsite produces a gold mine of data each day. Using an integrated solution will consolidate and standardise your data, allowing you to accurately report how teams or projects are performing in real time. In doing so, you'll gain powerful insights on quality and safety, budgeting, and productivity. With this valuable information, you have the power to baseline your current state, identify potential risks, and use supporting data to tackle those issues head on.

On-premise vs. Cloud Server

If you're thinking about storing data on office computers or servers, think again. The cost of space and maintenance alone are 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.

On-premise	Cloud Servers
License software 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 software can reduce IT support costs by outsourcing hardware, software maintenance, and support to the SaaS provider.
Expensive to maintain. With hardware and software, hidden fees like data migration, installation, training, hardware rental, and software upgrades become costly.	**No maintenance cost.** Since cloud-based software 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 software 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 software. Additionally, installed solutions are only available on the computer where they were installed.	**Flexible accessibility.** Cloud-based tools can be accessed anywhere, at any time, with any mobile or Internet-connected device. Teams can access or update project information, from RFIs to variations from the palm of their hands.

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.

Scalable

Software that is scalable in design simply means that it can easily grow with your business, at minimal cost to you. Factors include customisations, number of users, current database structure, and inputs and outputs like reports and connectivity to your other database systems. No one wants to test, develop, customize, and learn new software only to find out a year later you have outgrown it. With proper planning at the time of purchase, you can increase your chances of selecting a successful software experience.

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Get the Support You Deserve

Simply implementing a software solution doesn't guarantee success. Even with the most user-friendly systems, team members may require assistance at times. Make sure you'll be supported.

Implementation

A good indicator of a great product is the time it takes to train, implement, and deploy in the site. Your new software 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 higher chance the software is not intuitive or easy to use.**

Look for software that offers a clear implementation strategy including measurable goals, action items, and timelines that can be implemented quickly with an online learning system, support documentation, and live training sessions with a software expert. Watch out for systems that don't include implementation costs in their initial price or only offer training videos. You deserve to have an expert help you get the most out of your investment.

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 software to contribute to, rather than inhibit, your project's success.

Consider questions such as:

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

Look for a solution that offers in-house experts who know the software better than anyone else and can communicate clearly to solve your problems quickly. A top tier software provider will also offer all collaborators––not just power users or your employees––with 24/7 customer support to provide them with everything they need to keep your builds moving forward.

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Choose Your Partners Wisely

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

References

Customer testimonials speak volumes about a SaaS vendor's viability, as customer satisfaction is often a clear indicator of long-term success. When you're gauging deployment risk, there's nothing more comforting than knowing you're not the first company to have implemented the specific configuration you're planning. Read software reviews and case studies. 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

User feedback is one of the most valued inputs to the software development process. When customers have questions or concerns, it's vital that the vendor invest 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. 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 licenses. Make sure the solution you choose does not make you pay to receive product updates and enhancements.

User-Focused Software Development

Development based on real customer feedback creates solutions that grow as the industry evolves––keeping it current and valuable. 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. True agile software platforms remain ahead of their competitors, as they focus on gathering customer feedback and incorporating it into the development process.

Say goodbye to buyer's remorse.

There are countless solutions on the market touting "best-in-class" construction management software, so it can be a challenge to identify the right one for you and your teams. Taking a look at your current processes and equipping yourself with the right questions will help you evaluate which solution best fits your specific business needs.

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