

# Modernizing Capital Program Management: Overcoming Pain Points to Drive Successful Outcomes

A Comprehensive Guide to Addressing Challenges, Migrating to a Modern Solution, and Implementing Best Practices for Capital Program Owners

---

## Introduction

Capital program owners play a critical role in managing complex projects, overseeing budgets, and ensuring project success. Yet, they face unique challenges in their pursuit of efficient program/project management. While the adoption of a Project Management Information System (PMIS) is increasingly vital, an outdated PMIS is unlikely to meet capital program owners' evolving needs. This often leads to limitations and pain points that leave them feeling stuck and unable to achieve the results they were promised. Compounding matters is the time-consuming efforts associated with switching from one PMIS to another that may deter them from taking the necessary steps to upgrade their solution and drive successful outcomes.

This whitepaper explores the **6 most common pain points** experienced by capital program owners due to outdated systems, and how these challenges can be effectively addressed by migrating to a modern solution. Additionally, it offers **8 key steps** for a successful implementation.

## Why Modernize?

By embracing a modern PMIS, capital program owners can transform their projects into streamlined and efficient operations, where project information flows seamlessly, collaboration becomes effortless, and real-time data access is readily available. This shift in approach allows capital program owners to reimagine what's possible and embrace a path towards increased efficiency, collaboration, and success in their capital projects. In doing so, they're better positioned to confidently navigate the transition, maximize the value of their investment, and redirect their efforts from managing the status quo to optimizing their programs.

To better understand the advantages of a modern PMIS, let's explore some of the common pain points experienced with legacy systems and how they can be addressed by transitioning to a more modern and innovative platform.

### **Pain #1: Challenging to Navigate & Use**

One of the major pain points experienced with a legacy PMIS is the presence of a clunky and unintuitive interface. This results in users who struggle to navigate the system, leading to decreased user adoption and reduced productivity. Lack of an intuitive interface also means longer learning curves, increased errors, and frustration among users, which impacts their ability to efficiently manage projects and collaborate effectively.

### **Solution: User-Friendly Interface with Intuitive Navigation**

Investing in a user-friendly PMIS interface is a strategic decision with long-term benefits. Look for a system that prioritizes intuitive navigation, clear workflows, and an appealing design. This allows users to navigate effortlessly, access information efficiently, and perform tasks confidently, increasing user adoption. Additionally, customizable views and personalized dashboards present relevant information clearly, promoting efficiency, collaboration, and effective communication among project stakeholders.

## **Pain #2: Lack of Compatibility With Existing Workflows**

A significant challenge faced by capital program owners using a legacy PMIS is the lack of compatibility with their existing workflows. As each capital program may have its own unique set of processes and methodologies, the rigidity of a legacy PMIS can create inefficiencies and limit collaboration among team members.

### **Solution: Flexible Configurability and Integration Capabilities**

To overcome this challenge, capital program owners should select a configurable PMIS that allows them to align the system with their specific requirements. A configurable PMIS provides the flexibility to customize data fields, workflows, reports, and dashboards to meet the unique complexities of capital projects. This customization ensures that the PMIS captures the necessary data, supports specialized processes, and facilitates efficient decision-making.

Moreover, a modern PMIS with open APIs and integration capabilities ensures real-time data sharing with other essential systems and tools. This enables accurate and up-to-date information exchange, leading to informed decision-making, improved communication, and coordinated efforts among stakeholders, contractors, and team members.

## **Pain #3: Inadequate Access to Project Data**

Legacy Project Management Information Systems often suffer from a lack of access to accurate project data. This limitation negatively impacts effective communication among project teams and leads to delays in identifying and resolving issues. Without timely and reliable data, stakeholders struggle to make informed decisions, resulting in inefficiencies, errors, and potential project setbacks.

### **Solution: Integrated Mobile Application**

Embracing a modern PMIS with a tightly integrated mobile application is key to overcoming this pain point. With a mobile application, project teams can seamlessly capture and update field data in real-time, ensuring information is accurate, up-to-date, and readily available for all stakeholders, eliminating the reliance on manual data entry or the need for multiple systems.

Furthermore, the availability of this accurate and rich project data serves as the foundation for robust analytics within the PMIS. By leveraging data visualization, reporting, and advanced analytics capabilities within the PMIS, project teams can analyze project performance metrics, monitor project health, identify trends, assess risks, and make data-driven decisions. These insights enable teams to optimize project processes, enhance project outcomes, and drive continuous improvement across the project lifecycle.

### **Pain #4: Limited Project Visibility and Reporting Capabilities**

The current PMIS makes it challenging for capital program owners to monitor progress, track performance, and report effectively. Insufficient reporting capabilities and the absence of easy data extraction further exacerbate the issue, limiting the program owners' ability to gain clear insights into project status and make informed decisions.

### **Solution: Enhance Projects Insights and Streamlined Reporting**

To address this pain point, capital program owners should migrate to a new PMIS that excels in comprehensive project visibility and reporting functionalities. With robust reporting features, real-time data updates, and automated reporting capabilities program owners can gain clear insights into project status, effectively monitor progress, track performance, and report on project outcomes.

Additionally, with customizable dashboards and easy data extraction, program owners can extract relevant data and create personalized dashboards aligned with their specific reporting needs. The comprehensive reporting capabilities enable the generation of detailed reports, visualization of project data, and analysis of performance metrics, saving time and effort for capital program owners.

### **Pain #5: Insufficient Collaboration and Communication**

Inadequate collaboration and communication among project teams, stakeholders, and contractors present significant challenges that lead to coordination gaps, miscommunication, and project delays.

### **Solution: Connected Project Teams**

To address the pain of inadequate collaboration and communication, capital program owners should select a PMIS that offers robust document sharing capabilities, real-time messaging, and collaborative task management features.

A centralized document sharing platform can ensure stakeholders have access to the most up-to-date project information, reducing miscommunication and streamlining collaboration. Additionally, a PMIS with strong task management capabilities allows for clear assignment, tracking, and monitoring of project tasks. With enhanced accountability and visibility through task assignments, deadlines, and notifications, workflows are streamlined, duplication of effort is minimized, and overall project coordination is improved.

### **Pain #6: Inadequate Support from Legacy PMIS Vendor**

Limitations of legacy solutions, such as hard-to-reach customer support, outdated features, and inadequate training resources, limit capital program owners' ability to efficiently manage their projects and maximize the system's potential. Program owners are also likely to encounter roadblocks when trying to implement new functionalities, troubleshoot issues, or adapt the system to their changing project requirements.

### **Solution: Comprehensive Support for Program Success**

To overcome this challenge, capital program owners should consider transitioning to a modern project management solution that offers robust support services to ensure that program owners and their teams receive the guidance and resources needed to effectively utilize the system and address any challenges that may arise.

A solution with a proactive support team can provide valuable insights and recommendations to help program owners streamline their project management processes and overcome obstacles, offering guidance on system configuration, the implementation of new features, and best practices to maximize the value and functionality of the solution. The availability of regular software updates and enhancements further ensures the system remains up-to-date and aligned with industry best practices.

## Ready to Take the Leap?

While understanding the value brought by these improved capabilities, making the switch to a PMIS can still feel like a daunting decision. Owners are often hesitant due to fears of losing historical data, challenges of data migration, learning curves, and general change management; however, the advantages of making the switch cannot be overstated.

To fully capitalize on these advantages, capital program owners must dedicate efforts towards a well-executed implementation strategy. Leveraging these **8 best practices/key steps** when making the transition to a new PMIS will set owners up for success:

### 1. Develop a Plan for the Migration Process:

Create a well-defined plan that outlines the steps, timelines, and responsibilities for the migration. This plan should include key milestones, resources required, and a clear communication strategy to ensure everyone involved is aligned and informed. Determine the data culture for the organization including how data is collected, analyzed, shared, and utilized to drive insights and improve outcomes. Identify any improvements or enhancements to be made to data structure and company workflows to gain further efficiencies.

### 2. Assess Data Migration Requirements:

Thoroughly evaluate data migration requirements to determine the volume of projects and records that need to be migrated. Understand which data should and/or should not be migrated, identify archival data for reporting purposes, and explore automation options to streamline the migration process.

### 3. Identify Necessary System Integrations:

Identify any essential system integrations required for seamless data flow between the new PMIS and existing software or systems. Consider compatibility, data format conversions, and API capabilities to ensure smooth integration and minimize disruptions.

### 4. Establish a Timeline and Milestones:

Set a realistic timeline with specific milestones to track the progress of the migration. Clearly define deliverables and ensure that stakeholders are aware of the expected timelines to manage expectations and facilitate a smooth transition.

## 5. Allocate Resources and Responsibilities:

Allocate the necessary resources, both human and financial, to support the migration process. Define roles and responsibilities to ensure that the right expert is available to effectively handle various aspects of the migration. Ensure that the team doing the migration is also involved with the implementation. Decisions that are made during implementation and testing can have implications on data migration.

## 6. Plan for User Training and Change Management:

Recognize that user adoption is key to a successful PMIS migration. Develop a comprehensive training plan to educate users on the new system's features, functionalities, and benefits. Implement change management strategies to address resistance, communicate the advantages of the new PMIS, and provide support during the transition.

## 7. Migrate One Project into a Sandbox for Review:

Consider migrating a single project into a sandbox environment for testing and review. This allows stakeholders to familiarize themselves with the new system, identify any potential issues or gaps, and make necessary adjustments before proceeding with the full migration.

## 8. Conduct a Risk Assessment and Mitigation Plan:

Perform a thorough risk assessment to identify potential challenges and develop a mitigation plan. Anticipate risks such as data loss, technical glitches, or workflow disruptions, and establish strategies to mitigate these risks to minimize their impact on the migration process.

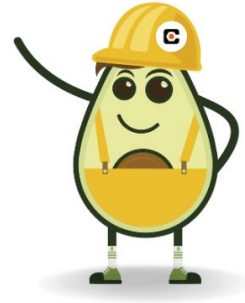
## Conclusion

A well-executed implementation strategy can enhance the likelihood of a successful transition to a new PMIS, ensuring minimal disruptions, maximum data integrity, and improved project management capabilities.

By carefully considering these factors and executing a well-planned migration strategy, capital program owners can overcome the pain points, unlock the potential benefits, and embark on a successful journey toward improved project management practices, enhanced outcomes, and long-term success in their capital programs.

## About Avicado

We know adopting technology and getting the most out of your investment is challenging. At Avicado, we aren't just Procore<sup>®</sup> Certified Experts: our team is comprised of people with diverse construction backgrounds and a proven track record of successfully implementing and enhancing construction technology for owners across many verticals.



Our knowledge of the industry and decades of hands-on experience is your secret weapon to getting the most out of your investment while helping ensure your team is well-trained and happy with your adoption.

**Avicado – Improving your experience with Procore.**

## About Procore

Procore is a leading global provider of construction management software. Over one million projects and more than \$1 trillion USD in construction volume have run on Procore's platform. Procore's platform connects key project stakeholders to solutions Procore has built specifically for the construction industry — for the owner, the general contractor and the speciality contractor. Procore's App Marketplace has a multitude of partner solutions that integrate seamlessly with Procore's platform, giving construction professionals the freedom to connect with what works best for them. Headquartered in Carpinteria, California, Procore has offices around the globe. Learn more at [procore.com](https://procore.com).