



Procore Implementation with HITT Contracting

Your Search Ends Here

PROCORE + **HITT**

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For any business subscribing to a SaaS product, fast time to value is a critical component of the decision-making process. After spending countless hours finding the software that will fit your business' needs, negotiating the cost, and finally signing all the paperwork, your solution shouldn't sit on a shelf collecting dust.

Time to value is a key business metric for Procore. We want our clients to start realizing value from Procore as rapidly as possible. This is in marked contrast to competing vendors that see a 12- or even 18-month implementation as being perfectly acceptable. For Procore, that doesn't make sense. A single user on a single project can start realizing value with Procore within hours of first using it because, really, nobody should have to wait.

I. Implementing Procore - Your Time to Define.

We take a phasic approach to implementation. You may be asking yourself, “why?” Because, the implementation phase is your best chance to mold Procore to your specific needs, to decide exactly what you want it to do. To give it your company’s personality and footprint. Will you be using the Procore tools to just build your building? Or will you also want to use Procore to archive your project so you can go back and look at HOW you ran the job? What fields do you want in the profiles? How many selects and characteristics do you want to use to define a project profile?

You are the tailor. Make Procore a perfect fit.

To make the implementation phase as deliberate as possible, it's recommended you come up with a written implementation plan that you can follow. Need some help? We've got you covered.

What follows is an implementation model offered for your reference. Every company has its own culture, its own way of doing things, its own "project execution personality." What's offered here is a road map based on the implementation experience of Procore user, HITT Contracting. A general contracting company based outside of Washington, D.C., HITT is currently

ranked #64 on the ENR list with over \$1.1 billion in construction volume each year. They are running over 825 concurrent projects in Procore encompassing 23 states with 5 offices nationwide.

Each section of the implementation plan is preceded by an overview in the words of Jim Landefeld, Senior Vice President of Operations Technology at HITT. An experienced and knowledgeable Procore user, these brief comments provide a friendly frame of reference from someone inside a major construction firm who successfully completed the implementation.

II. Project (Implementation) Mission and Goals

“The biggest reason software implementations fail is due to the lack of a written plan. Everyone in this industry is a planner and a builder. We all need a schedule, plans, and specs to do our job. Why is the implementation of software any different? Writing a project mission statement forces you to put the thought into what you want to get out of the software. Mission and goals should look beyond the initial implementation and into the future maintenance of the software.”

- Jim Landefeld, *HITT Contracting*

The establishment of an in-house implementation team to support the integration of Procore with your company's systems is important, as is the assembly of a written plan for the implementation itself. The goal of the team will be to provide your employees collaborative training and access to Procore, and to provide an in-house "help desk" for fielding real time questions by your employees. This implementation goal will be accomplished through these steps:

- 1 System Setup
- 2 System Migration
- 3 Training
- 4 Roll Out

The project mission and goals will have been successfully implemented when Procore has been integrated into your company's systems in such a way that the software bears your company's brand persona across all interface instances. At that time, the software's collaborative, cloud-based project management solution will be available both internally to project teams and externally to clients, architects, and subcontractors.

Phase II of the Procore implementation may include continuing education sessions for your company's user group and ongoing evaluation of usage statistics.

III. Implementation Team

“After many years of implementing software, we have learned the importance of choosing the head of the implementation team... a strong leader familiar with all aspects of the construction process including the technology, information processing, and field construction processes is essential.”

Your implementation team may include plan managers with these respective responsibilities:

Executive Sponsors

The executive sponsors will receive regular updates on project status and milestones through status reports and meetings.

Procore Admins

Procore admins will define the implementation plan and schedule and drive the day-to-day activities of the implementation to ensure successful rollout. The main function of the Procore admins will be to broker the communication between your in-house team and Procore. Think of the Procore admin(s) as the Chief Communications Officer for the implementation.

Implementation Specialist

The implementation specialists are your in-house Procore specialists, and will provide the benefit of past implementation experience. Implementation specialists also provide coordination for IT and Business Systems for setup and roll-out requirements.

Market Sector Representatives

(If and where appropriate).

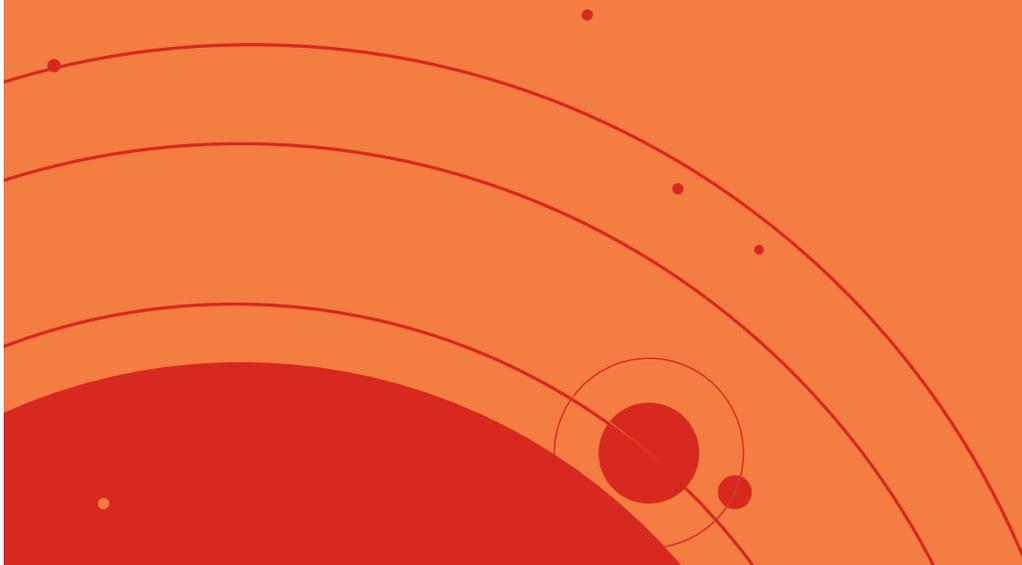
If your company does business across distinct market sectors, it really is recommended that a rep from each market sector appear regularly at implementation team meetings to ensure uniformity of practices.

Departments of Coordination

Where assistance is required of the IT Department, the implementation project managers will coordinate such assistance as needed.

IV. Functionality and Scope

“It is important to set the minimum standards for the use of the system including only the essential tools to run a project. Our ‘template’ for each new project includes what (we) consider to be the basics to running a project—*Submittals, RFIs, meeting minutes, daily logs, documents, and drawings*. The remainder of the tools, based on the project requirements and the staff available, can be added to each project as the needs dictate. KEEP IT SIMPLE and let the user add as necessary.”

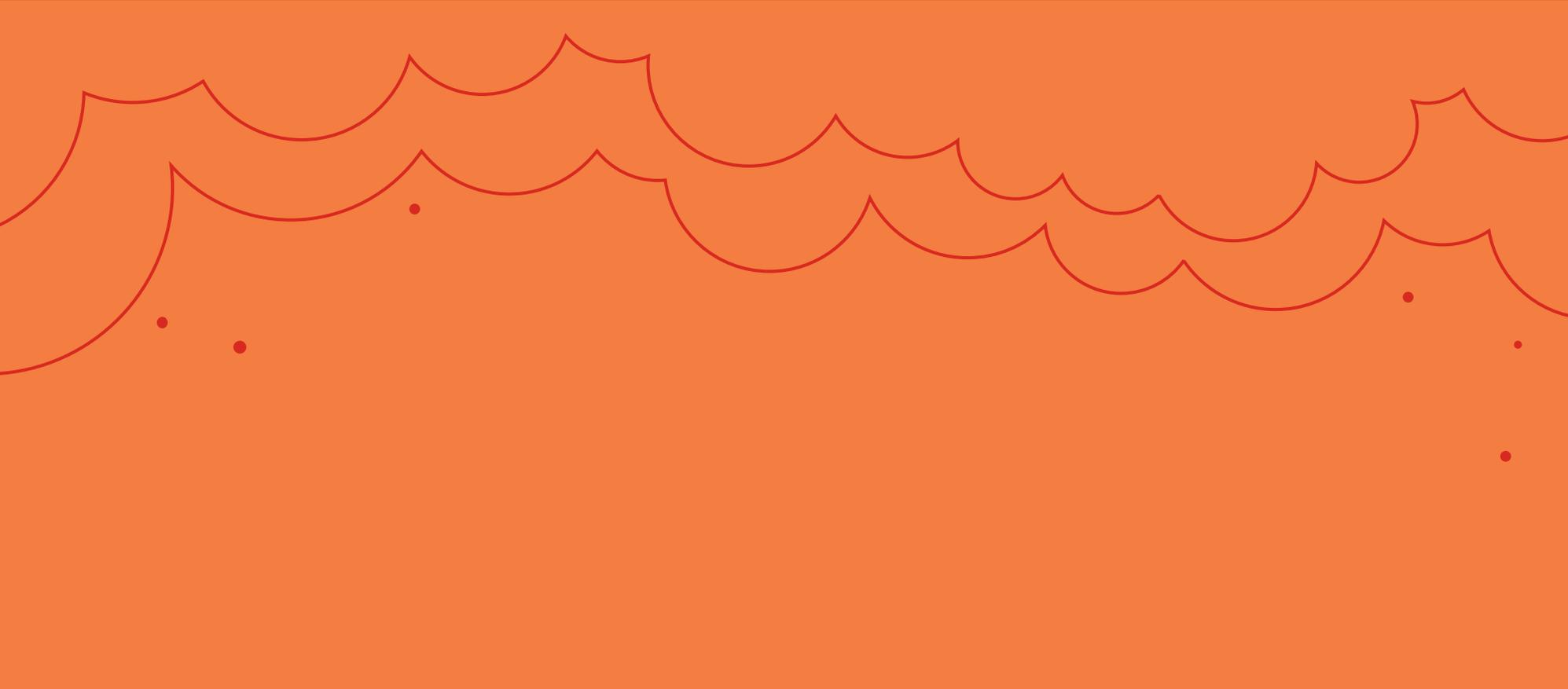


As the implementation planning begins to take shape, you may want to consider an initial limited rollout of select tools in the Procore suite, incrementally introducing general Procore usability to the managers and stakeholders. The inaugural tools chosen should be those of most immediate use to key projects and project managers.

The scope of this implementation should thus be to complete training on the several selected Procore tools chosen for initial rollout, with progress monitored based on these criteria:

- Completion of implementation steps
- Resolution of issues
- Completion of training
- Completion of schedule

It has been recommended that a project threshold approach be utilized, choosing for initial Procore utilization only those contracts that do not fall below a chosen threshold dollar value to be decided by your company.

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V. Communication

“THIS IS A BIG DEAL! The implementation steps cannot be done in a vacuum and simply rolled out when the implementation is considered complete. We considered all of our employees essential to the success of the project, and therefore communicated the implementation steps we were taking at regular intervals.”

Your team is implementing collaboration software, so it only makes sense that the collaboration begin with the Procore implementation project itself. Effective communication is critical to the success of the implementation. Again, the implementation project manager(s) will serve as Chief Communication Officers in the implementation process.

All issues should be reported directly to the project managers. As the implementation moves forward, a log of questions will be maintained and broached with your Procore implementation manager. The project managers will broker these conversations with Procore.

As these implementation questions are broached with Procore, it's important that your company at all levels be likewise kept abreast of implementation developments through superintendent meetings, project manager meetings, executive meetings, and department meetings.

The project managers will work with marketing to devise a formal internal campaign to generate enthusiasm and acceptance of the Procore product.

VI. Your Company Training

“We found that the more face-to-face training we had with the end users, the more adoption there would be. Given the exceptional instructional media already imbedded within Procore, we felt it was still necessary to spend the time up-front visiting each group of users, whether superintendents in the field or project managers in the office, to demonstrate, in real time, what each group needed to know.”

Procore provides Procore certification, their version of a learning management system, as part of the implementation process as well as for ongoing needs. The core training is self-paced and includes brief videos, each followed by a knowledge-testing quiz. You'll want to determine which modules your team should train on in order to reduce the amount of time it takes to complete the course. This allows your team to focus on the most relevant features.

Once core training requirements have been met and employees have participated in some weekly seminars to make sure they have a base acquaintance with the Procore product, we recommend that members from your implementation team provide in-person training for each satellite office location.

Procore training may be introduced as a curriculum in your company's internal training, as a way to augment Procore's self-paced learning tools. Some companies offer "lunch and learn" sessions to help complete the Procore core requirements. At these sessions, a Procore training video could be shown followed shortly by an in-house representative entering the Procore platform for a live demonstration and to answer any follow-up questions.

Any questions that can't be answered in these sessions will be added to your "Log of Questions" and conveyed to Procore. If your company should decide to offer these lunch-and-learn sessions (or an equivalent), it is recommended that your company provide an actual registration mechanism and attendance tracking for these core requirement

sessions. That is, participation should be tracked. It's important that your employees receive the training concurrent with each other, as a learning cohort, so there is no knowledge-gap between your users.

New hires should be granted access to your company's internal training regimen, Procore certifications, and the test projects in Procore, so that training may be hands-on. Your company's contact directory database in this context may have fake emails appended to certain clients, subcontractors, and architects so that these contacts are not bothered with outbound emails as you test the communications features in Procore.

Enrollment and attendance tracking will be provided through this internal training process and, upon completion of training in a particular Procore module, users should be granted access to that module. Upon receiving a help desk ticket indicating the names of the employees who have completed training, IT would grant appropriate Procore access to the new users (construction or non-construction, as needed).

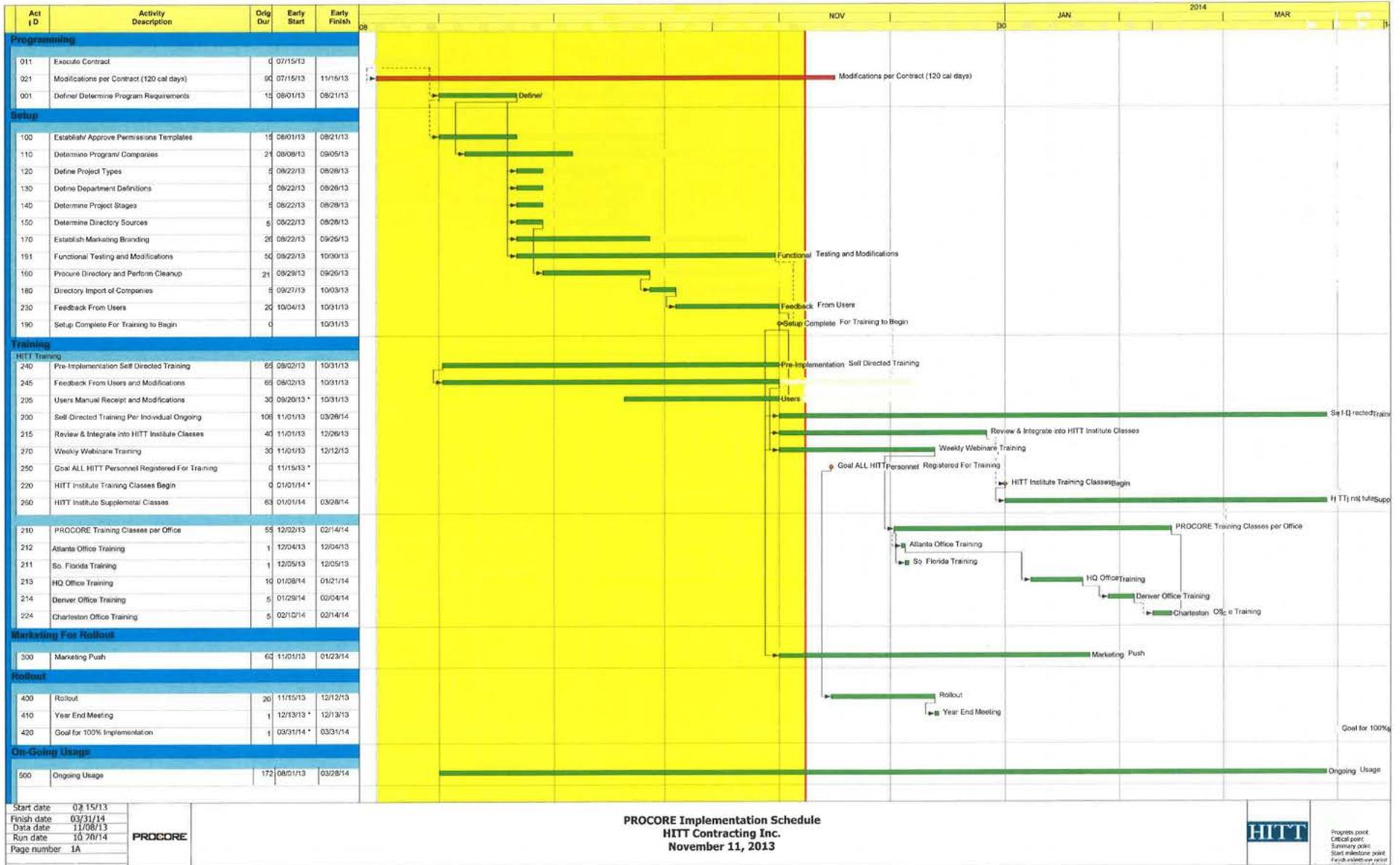
It's also recommended that a "Tips and Tricks" document be developed, outlining your company's way of utilizing the software according to company standards, as well as shortcuts and user advice based on user input.

VII. Roll Out

“An important lesson that we remembered from previous implementations was the need for a **soft-landing** to the live date. We allowed access to the software several months ahead of the live date which allowed for early-adopters to have a gradual acceptance of the total functionality of the software on a tool-by-tool basis before it was required to be used. Convincing the superintendent that walking up 7 flights of stairs with a set of drawings was more difficult than simply carrying his tablet was simple, and could be easily demonstrated. It was amazing to see word get around the office as to how easy it was to use.”

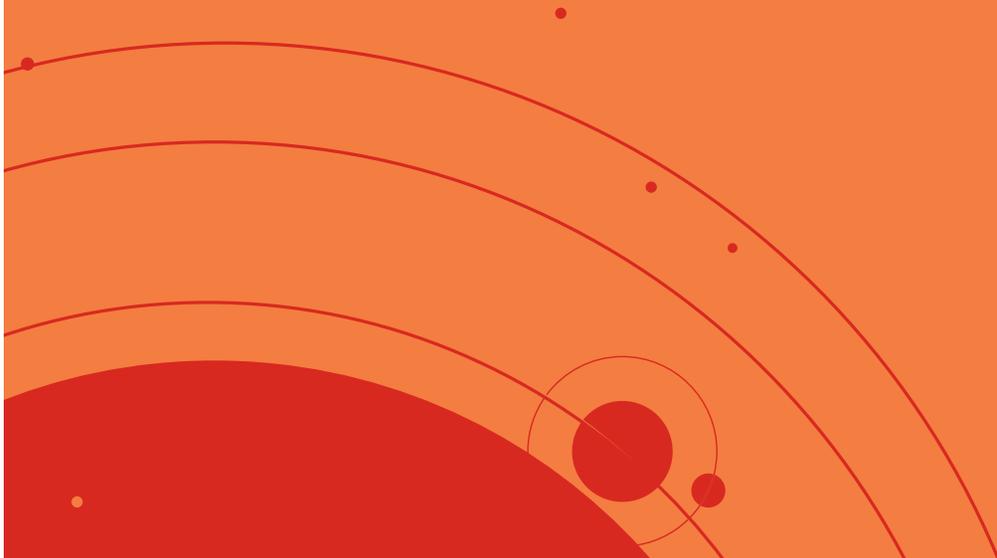
The system roll out may be accomplished with multiple mini-steps, allowing for quick use of the system prior to its use being actually mandated company-wide. Initial online training followed by a calibrated, limited use of the system prior to mandated usage will enable the users to get comfortable with the software at their own pace. This “familiarization phase” should last a recommended 3-4 months, but of course your company can make its own decision on the duration of this phase.

You will see that some of your people take to the software more readily than others. Encourage these “early adopters” to spread their enthusiasm with, and knowledge of, the Procore software. They will effectively be the salesmen of the program to their colleagues.



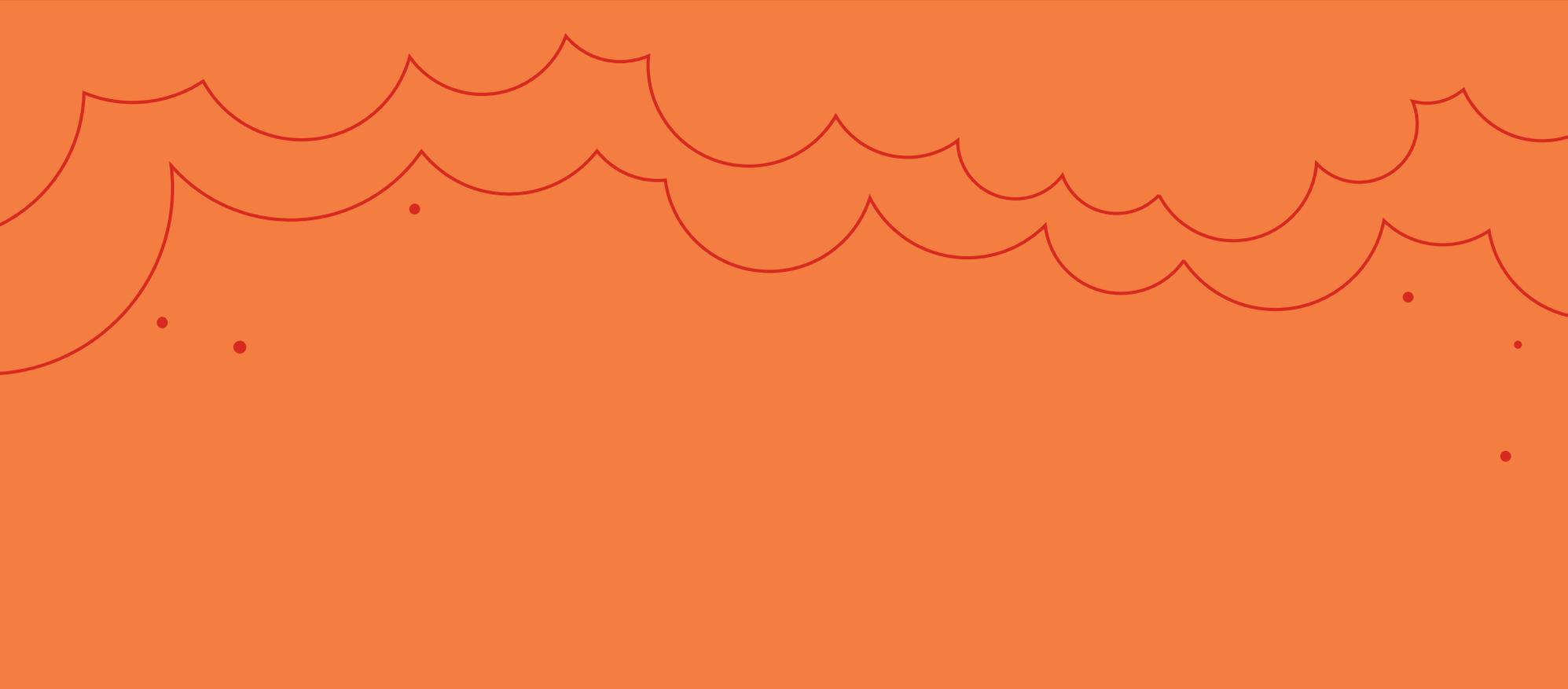
VIII. Risk Management

“Any plan has its risks and software implementations are no exception. The sooner you identify the risks and create a plan to address them, the better off you will be when the risks rear their heads.”



The implementation is not considered a high risk for various reasons. The software is user-friendly and intuitive by design. Nevertheless, any enterprise-wide software implementation does contain some element of risk. Here are several risks that may be considered more or less standard in an enterprise-wide implementation setting:

- Yes, you require complete training before granting your people access to the system. Once your worker has gained access to the system, IT can't completely control the related access of colleagues connected to that worker's project(s). If a person is named on any project directory with a valid email account, that person may be invited to join the system.
- Maintaining integrity of the directory in Procore will be an administrative challenge. Follow the career path of outside contacts so the system directory may provide accurate and effective collaboration.
- It's not possible to prevent your users from falling back on the old systems and methods that preceded Procore. The software allows for measurement and tracking of individual usage. Executive oversight and enforcement should be considered MANDATORY if you want to reach the goal of an enterprise-wide adoption of the Procore system.
- Your implementation team will be working double-time, seeing to the introduction of new users to Procore while following the progress of established users in the system. The entry of directory records during this period of established and new users commingling in the system presents opportunities for mistakes of entry to be made. Be mindful of data-entry accuracy.

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IX. Change Management

“This takes us back to the beginning: **The Project Mission and Goals.** Much of what is discussed during this process sets the standard as to how to deal with changes. What we have learned is that if the implementation plan is sound, it is best to keep on the original plan and not be distracted by changes or modifications that someone may request.”

Effective change management is an essential element of this implementation. System changes should be very carefully scrutinized and evaluated prior to being made formal requests of Procore. All system modification (change) requests should be submitted directly to the project managers. The project managers will work with the team to evaluate each request and determine the need and priority.

The project managers should be the only team members to submit modification requests to Procore. Generally speaking, changes should be kept to a minimum and scheduled to ensure that the system as a whole is not being changed while the system is still being implemented and rolled out.

X. Summary: Procore Implementation Steps

- Your logo import and setup
- Permissions Wizard – establishment of which employees and managers have access to which areas in Procore
- Cost code import and setup – even if your Procore instance does not make use of cost and contract functions, cost codes may be referenced on RFIs
- Training
 - a. Train the trainer
 - b. Online with reports on completion
 - c. Webinars
 - d. User guide
- Support
 - a. Jim Landefeld's Groundbreak 2016 Presentation
 - b. support@procore.com
 - c. <http://support.procore.com>

XI. The Benefits of Procore are Yours for the Taking

Procore is your indispensable project management tool set, collaborative space, and project archive that allows:

- Instant access to up-to-date project data 24/7 for all users
- Informed decisions from the job site based on complete, real time information
- Improved communications and collaboration with all team members due to instant access and notifications
- Complete mobility through the use of tablets and smartphones
- Consolidation of all documents in one commonly accessible location
- Shortened project closeout process for drawings and submittals through the archive process
- Automated and synchronous drawing updates
- Increased accountability for all team members through “My Open Items” and “By Who, By When” (Ball in Court)

Go forth and build. We've got your back.



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