



Jobsite Management Software Buyer's Guide **for Specialty Contractors**

BROUGHT TO YOU BY FIELDWIRE





TABLE OF CONTENTS

- 3** Introduction
- 4** Step 1: Rally your champion team
- 5** Step 2: Identify your pain points and needs
- 8** Step 3: Research and evaluate solutions
- 9** Step 4: Make a decision and secure buy-in
- 11** Step 5: Seek support for long term success
- 13** Appendix: Resources for software selection

INTRODUCTION

Craftsman to craftsman

Let's be honest, evaluating new software for your team is annoying. Every company tells you that their software is the best and that it will "fix" all your problems. The truth is, most of them are full of it. The majority of software out there is as good as using a wrench to hammer nails. However, with this guide in your tool belt, you'll have what you need to find the right jobsite management software for you.

In five short chapters, you'll learn from the best — former PMs, engineers, and construction technology experts — about the steps you can take to ensure long term success.

- » **Step 1: Rally your champion team**
- » **Step 2: Identify your pain points and needs**
- » **Step 3: Research and evaluate solutions**
- » **Step 4: Make a decision and secure buy-in**
- » **Step 5: Seek support for long term success**

Best of all, you'll walk away from this guide far less frustrated about which technology you should use and you'll feel confident in your ability to evaluate jobsite management software.

So go on, what are you waiting for?

Let's jump straight into the first step!

CHAPTER 1

Rally your champion team

Evaluating and implementing jobsite management software is a team effort, so you'll need to build a group of champions to help you with some of the heavy lifting. Your champion team should include:

- » At least one project manager
- » At least one superintendent
- » A project engineer or APM
- » A foreman
- » The director of operations (or someone in a similar role)

Most importantly, your champion team should include at least one team lead from each of your field teams. These are the folks who'll be using the software day in and day out and pushing for adoption. This combination of roles will ensure multiple points-of-view are represented throughout the entire software selection process.

PRO TIP

If you're struggling to convince your peers to join your champion team, let them know why you need their help by providing them with answers to these three questions:

- » Why is this change necessary?
- » How will this change benefit them?
- » What will this change involve?

CHAPTER 2

What are your pain points and needs?

Step 1: Identify your pain points

Now that you've identified your champion team, it's time to identify your pains and frustrations. We recommend mapping out your current processes to help identify where things are breaking down, **then make a list of everyone's top pain points and rank them in order of importance.**

Specifically:

- » **Plan viewing and version control:**
How often do you work from outdated plans? Do you have access to updated information? How do you distribute updated revisions to your crews onsite?
- » **Communication:**
When an issue arises on a project, how much time do you spend going back-and-forth until it's resolved? How are you tracking issues and progress on work?
- » **Visibility:**
Can you quickly and easily see how your projects are tracking? Is it easy to join a project and know what is happening?
- » **Reporting:**
Is it tedious and often incomplete? Do you feel like it's taking too long to find information and compile it into one report?
- » **Efficiency and accuracy:**
Is data scattered across multiple places? Does important information slip through the cracks? Do you find yourself looking in different places to find information?
- » **Accountability and proof:**
Is it difficult to hold teams accountable and prove completed work to clients? Do disputes arise with clients when documentation is incomplete? How often do you have the "he said, she said" battle?
- » **Adoption:**
Do your field teams actually use the tech you currently have? Why/why not?
- » **Profitability:**
Is it difficult for you to identify the root cause of issues that impact your bottom line?

ASK YOURSELF:

Essentially, what are the current processes and programs that prevent you from doing your job effectively and efficiently?

CHAPTER 2

Step 2: Identify your software needs

Make a list of your team's needs, both now and in the future. While you may not need a specific feature like a BIM viewer right now, you may want it down the road. Separate your list into two columns: "Must-haves" and "Nice-to-haves." This will help you identify the software solution that can serve your company for years to come.

To determine whether the software you're evaluating can set you up for long term success, consider the following questions:

» Adoption

Do you need something that's easy to use? How quickly do you need to get up and running on the software?

» Scale

Can the software run efficiently at your scale?

» Deployment and training

Do you have dedicated resources or do you need something seamless? How quickly do you need to get something rolled out?

» Service and support

What level are you looking for? Someone that you can speak to within minutes or someone that responds back to your email within a week?

» Price

Do you have budget and flexibility? Or are you limited to free software only? What kind of ROI do you expect?

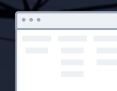
[Check out our convenient software feature checklist](#)

What to look for in your software solution

THE MUST-HAVES



Plan viewing and document control



Detailed task management



Mobile applications

THE NICE-TO-HAVES



Integrations



Real-time communication and transparency



Customization

CHAPTER 2

What to look for in your software solution

The must-haves

» Plan viewing and document control

Go paperless with jobsite management software that lets you upload unlimited sheets, view and compare them on mobile, plus add annotations, photos, and markups for as-built tracking. If your main frustration is rework, then consider a software solution that also offers automatic version control so that you're never caught working from an outdated plan.

» Detailed task management

You need a way to efficiently track, document, and communicate the install of low voltage devices. With the right task management software, you can geotag the exact location of devices on plans, build checklist templates to streamline maintenance and ensure consistency, plus categorize tasks to give clients a quick snapshot of completed or in-progress tasks regardless of their location.

» Mobile applications

Because construction takes place on the jobsite, you need native mobile applications — to markup plans, track changes, and document issues from any location on-the-fly. And because job sites rarely have wifi, you also need offline accessibility — to view plans, files, and tasks and stay productive onsite.

The nice-to-haves

» Integrations

Look for a platform that can integrate with other leading technologies. E.g., cloud storage systems like Dropbox, Box, or OneDrive. The more integrated your tech stack is, the less manual work you have to do.

You may also want to look for a platform with an open API. That way, you can transfer existing plans and files to your new software without any headaches. You can also leverage project data and eliminate the risk that comes with siloed information.

» Real-time communication & transparency

Keep your crews and clients on the same page with software that connects the office to the field. Look for features like real-time progress reports and communication, plus overall transparency into installed items, photos, change orders, and more!

» Customization

If you want a platform that truly works for you, look for something that can be customized to match the way you already work. Many solutions offer customizations for integrations, but only some offer customizations for workflows and forms. Make sure you define exactly what level of customization you require at the beginning of the evaluation process.

CHAPTER 3

Research and evaluate solutions

After you've created a list of must-haves and nice-to-haves, you can start to evaluate different jobsite management solutions effectively. Look for software that solves your specific pain points and meets your specific needs. Start small — **create a shortlist of 5 or fewer platforms — and evaluate them as a team.**

Once you've scheduled demos with each software vendor from your shortlist, prepare a feature checklist. This example checklist, or shopping list, will help you quickly compare solutions side-by-side and identify the right one for you.

You also want to ask each vendor (ahead of time) to show you how to use their product for a workflow or use-case specific to you and/or certain members of the champion team. Even better, **ask if you can trial the product for free to test functionality, usability, and performance on multiple devices.** After all, you don't want to invest in something before it's been tested under real world conditions. Besides, you definitely don't want to invest in something that people won't use. By doing this, you'll know exactly whether or not the software can address your pain points and meet your needs.

Read our list of essential questions for software vendors

A photograph of several construction cranes against a clear blue sky at sunset. The cranes are silhouetted against the bright orange and yellow light of the setting sun. The image is used as a background for the 'PRO TIP' section.

PRO TIP

Run a simple 'click test.' Record how many clicks it takes you to upload a plan, post an RFI, and/or invite a user. This will give you a rough idea of how user-friendly the product is and whether it can improve efficiency.

During demo calls, ask each vendor how often new features are released and whether users have a say in what those are. After all, you want to select software that can scale with your business.

CHAPTER 4

Secure buy-in

By this stage, all demos and product trials are done and you and the champion team have agreed on a single solution. Now it's time to secure buy-in from other stakeholders within your company. Often these stakeholders are "higher-ups" or the "suits", but don't let that stop you. They want the same things as you, a clear return on investment.

To secure top-down buy-in and communicate ROI, put together a simple cost-benefit analysis which provides answers to questions like these:

Currently, per week...

- » How much time is spent on project setup?
- » How much time is spent scheduling meetings?
- » **How much time is spent tracking down information, documents, or answers to questions in email threads?**
- » How much time is spent on double data entry (transcribing paper forms to digital, scanning/uploading paper forms, re-typing the same issue from a text message or email into a form then emailing it to someone)?
- » How much time is spent waiting due to lapses in communication/coordination?
- » How much time is spent following up with people?
- » How much time is spent distributing paper plans?
- » How much time is spent on site making sure crews have the latest information?
- » How much time is spent walking back-and-forth between issues onsite and the trailer?
- » How much time is spent reporting?
- » In general, how much time is spent gathering project data to inform future decisions?

Then...

- » What is the total sum of that time (in hours)?
- » Multiply that by your average hourly rate
- » Multiply that by 52 weeks
- » Multiply that by headcount



EXAMPLE:

28 hours of manual administrative work

x \$25 per hour = \$700

x 52 weeks = \$36,400

x 5 contractors = **\$182,350**

This simple equation will help you prove how much time and money is being wasted on manual processes, plus how much could be saved by switching to a new system.

CHAPTER 5

Seek support during & after implementation

User-friendly jobsite management software takes just days to implement.

During this time, you and your team should be provided with online resources and/or in-person training to ensure you're set up for success.

Implementation is just the first step to success. You want to partner with a technology provider that promises to assist you long after implementation, because even the most tech-savvy users will have questions they don't know the answers to.

For this reason, you should partner with a Support Team that is invested in your long term success.

Support comes in many forms, including in-person training, emails, phone support, online help guides, and video tutorials. Regardless of the type of support you're after, it needs to be immediate, because the last thing you need is more downtime on construction sites.

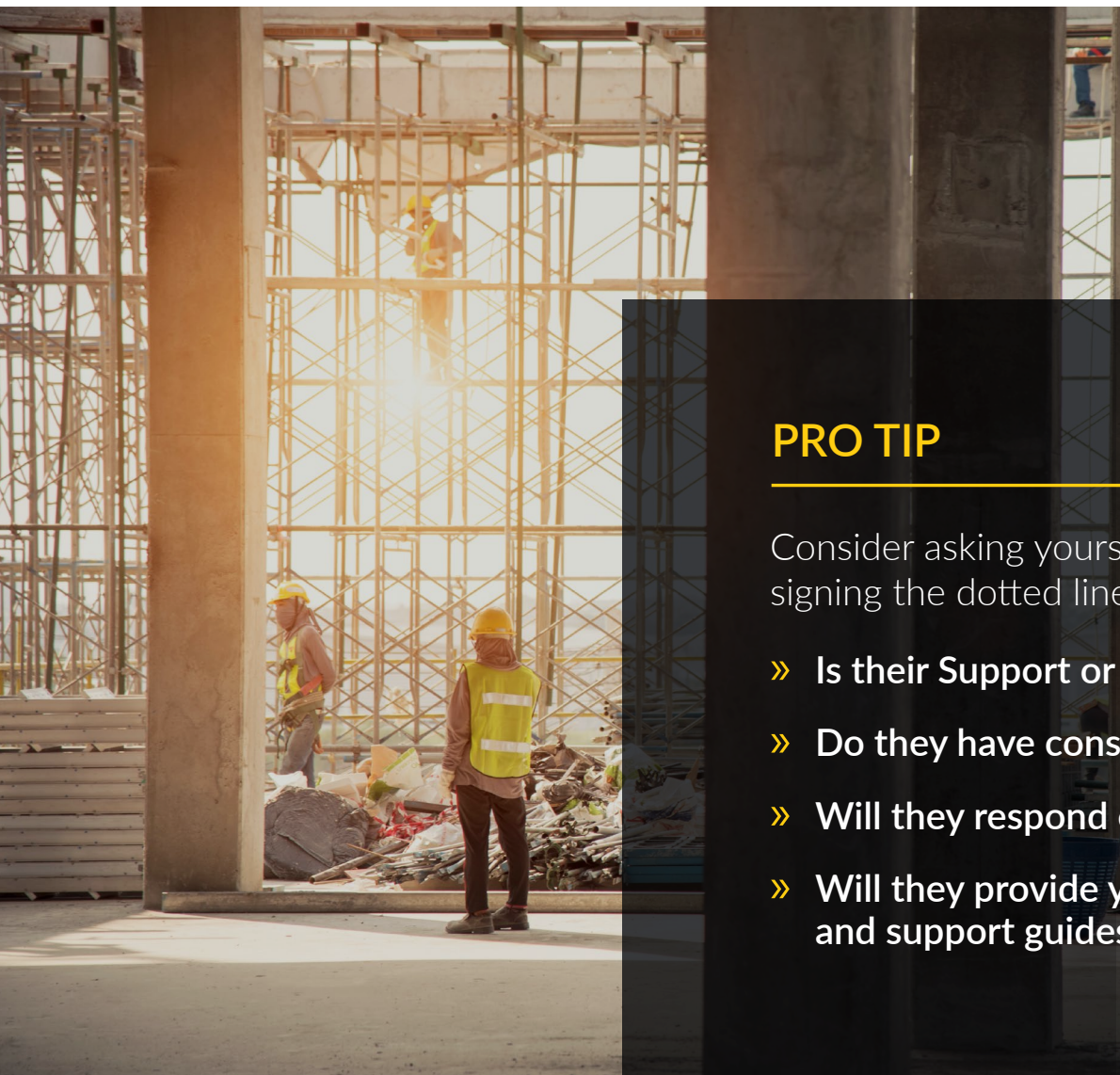
Have your champion team agree on the type of support your company needs and keep that in mind when selecting the vendor you'll partner with well into the future.

Read our list of essential questions for software vendors

PRO TIP

Consider asking yourself these questions before signing the dotted line:

- » Is their Support or Customer Success team in-house?
- » Do they have construction industry experience?
- » Will they respond efficiently and effectively 24/7?
- » Will they provide you with implementation, training, and support guides that are accessible to you 24/7?





FIELDWIRE

Fieldwire is an end-to-end jobsite software solution for the construction industry. With its instinctive mobile application, Fieldwire connects the entire project team — from the subcontractor's foremen to the general contractor's project manager — enabling efficient and real-time information sharing. Used on more than 1,000,000 projects worldwide, Fieldwire has saved its users millions of dollars by powering clear and efficient communication between the office and the field.

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Jobsite Management Software Buyer's Guide **Appendix**

TOOLS FOR FINDING YOUR PERFECT SOFTWARE SOLUTION



Software checklist

Platform functionality	Fieldwire
JOBSITE MANAGEMENT	
Plan viewing & version control	
Markup & annotate plans and photos	
Task management & scheduling	
Custom workflows	
CONSTRUCTION MANAGEMENT	
Document management	
Photo, video, and file management	
REPORTING	
Inspection checklists & reports	
Punch lists & reports	
Daily & progress reports	
Custom construction forms	
FUNCTIONALITY	
Cloud-based	
Integrations (Box, Dropbox, OneDrive) & open API	
Native mobile applications (Android, iOS, Windows)	
Offline functionality	
IMPLEMENTATION & SUPPORT	
In-house customer support	
Online video tutorials and help guides	
PRICING	
Price per user & custom enterprise plans	
Free version available	
Monthly or yearly subscriptions	
Unlimited projects, sheets, and storage	

What to ask a tech vendor

Ask vendors to provide you with answers to any of these example questions.

Scalability

1. Can your product be used out of the box?
2. What is the minimum amount of time a project set up will take?
3. What sectors of the industry currently use your product?
4. Can your product provide standardization across my company?
5. Can I see how many users I have on your product?
6. Can your product be used on all of our company devices?
7. Does your product have project, data, plan, or other limitations?

Tasks

1. Does your product have status tracking?
 - » Are you able to customize those statuses?
 - » Does the status include a 2-step verification to confirm quality
2. Does your product have the ability to assign a user to a task?
 - » Does that assignee get a real time app push notification?
 - » Does that assignee get email notifications?
 - » Does that assignee have a running list of tasks they are accountable for resolving?
3. Are you able to customize task categories or filters?
4. Does your product allow you to link tasks to plans?
 - » Does your product allow generic tasks that aren't linked to the plans?
5. Does your product have real-time messaging communication?

6. Does your task functionality have the ability to link photos, files, forms, and crop plans?
7. Does your task functionality allow you to proactively plan the job?
8. Does your task functionality allow you to break tasks down into smaller items via checklists?
 - » Does your product support one-off checklist items?
 - » Does your product support checklist templates for repetitive tasks?
9. Does your task functionality allow you to relate tasks to one another?
10. Does your task functionality include start and end dates?
11. Does your task functionality include advanced task attributes such as location, hashtagging, manpower, and cost?
12. Does your task functionality record time stamp history?
13. Does your product support configurable email notification settings?
14. Does your product support bulk importing of tasks?

Workflows

15. Does your product support a punch list workflow?
16. Does your product support planning/scheduling/tracking work?
17. Does your product support safety tracking?
18. Does your product support QA/QC?
19. Does your product support site walk observations?
20. Does your product support a constructability review?

Dashboards

1. Does your product have a kanban view to see the tasks in columns by priority?
2. Does your product have an interactive calendar view?
 - » Does this view have a click/drag capability?
3. Does your product support a Gantt view/schedule look ahead?
 - » Does this view have a click/drag capability?
4. Does your product have a manpower graph?
5. Does your product have a project analytics view?
6. Does your product support detailed filtering and sorting of tasks within these dashboards?

Reporting

1. Does your product support custom task report templates?
2. Does your product automate task reporting?
3. Does your product support PDF and CSV report exports?
4. Do your reports contain live attachment links?
5. Do your reports support distribution to external parties outside of the platform?

Forms

1. Does your product supply out-of-the-box form templates?
2. Does your product have the ability to build a custom form?
3. Do your forms support photos, files, and 360 photo attachments?
4. Do your forms support custom dropdown lists?
5. Do your forms support auto-generated and free hand signatures?
 - » Are you able to sign a form if you are not on the platform?
6. Do your forms support email, PDF, and CSV exports?

Files

1. Does your product support folder sorting?
2. Does your platform support file tagging and filtering?
3. Does your platform support an in-app PDF editor?
4. Does your platform support file folder permissions?

Photos

1. Does your product support photo markup tools?
2. Does your product support geo-tagging mobile photos?
3. Does your product support a 360 photo integration and viewer sphere?
4. Does your product have a project photo dashboard?
5. Does your product support photo tagging and filtering?
6. Does your product automatically create a time and date stamp?

BIM

1. Does your product support a model viewer?
2. Does your product support a mobile viewer?
3. Does your product provide model properties?
4. Does your product have orbit and walking views?
5. Does your product have the option to hide, isolate, and measure 3D objects?

System requirements

1. Does your product automatically sync when the internet is available?
2. Does your product support mobile offline usability?
3. Does your product support tablet and phone functionality?
4. Is your platform supported via iOS, Android, and Windows App?



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