

EXECUTIVE INSIGHT



ProEst[®]

7

Tips to Get Your Estimators On Board



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INTRODUCTION

Deep down, most contractors know when it's time to make a change to their estimating process. Some may have become frustrated by inefficiency and high costs. Others know that they need to improve the accuracy of their bids. And many can see the advantages of online access to keep productivity levels high.

Adopting a cloud-based, construction-specific estimating platform is the answer— powerful technology designed to help GCs and subcontractors prepare project bids and keep track of details associated with the pre-construction process. So far, so good. But while implementing a new estimating tool may seem like a sound—and logical—business decision, there may very well be push-back from the very people who will be asked to use it. And without buy-in from your estimators, your new solution simply can't deliver all the benefits you signed up for.

Research shows that nearly 70% of all business initiatives focused on operational and process change fail to live up to their promises, most of which is caused by insufficient preparation and lack of "cultural conditioning." Simply put, if people aren't ready to embrace a new way of working, the best technology in the world won't be effective—and what seemed like a wise investment becomes a waste of money instead.

In this report, we'll explore seven ways to help your estimators and other project stakeholders get on board with your new construction-specific estimating platform. By framing the change as an opportunity, communicating its benefits ahead of time, and taking the right steps once the

solution is in place, your new estimating solution can offer all of the business benefits advanced technology has to offer.

Best Regards,

Jeff Gerardi

Jeff Gerardi
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TIP #1: ACKNOWLEDGE THAT CHANGE IS HARD

Change is inevitable, but that doesn't mean that it's always easy to accept. Conventional wisdom tells us that we can simply convince people to be more flexible and less risk-averse—to see the “new and different” as an opportunity rather than a problem. But things are rarely that simple when it comes to processing change. Here's why: humans have evolved to value certainty over uncertainty, which stems from a basic instinct to survive. We're hardwired to want to predict and control our circumstances, which means that when confronted with the unfamiliar, our brains can interpret it as a threat—even if it's just a new way of working.

So, what can you do to make sure your estimators are on board with a new estimating platform? First and foremost, communicate that doing things in a different way is a challenge rather than a threat. The emotional math is simple: a threat is something to fear and eliminate; a challenge, even if it means embracing the unknown, can be successfully met, and has the potential to yield a positive outcome.

It's also true that change can be more difficult for some people than others. Many contractors have seasoned—and highly valued—employees with established routines and a mastery of specific skills and tasks acquired over time. Your estimators, who may have begun their careers with paper and pencil calculations or generic spreadsheet tools, are often among them. The good news is that the presence of technology in everyday life (think smartphones, ATMs and Alexa, to name a few) is now so widespread that acceptance of digital tools is generally high. And, as we'll see in Tip #2, making the case for moving to an automated estimating solution is even easier when the end benefits to the user are abundantly clear.

STEPS TO SUCCESS

- ✓ Understand and acknowledge that people are hardwired to cling to the familiar in order to feel safe and in control
- ✓ Position your new estimating platform as a challenge to be mastered rather than a threat to be avoided
- ✓ Find and communicate parallels and synergies between other technology-based activities and your new platform



TIP #2: FOCUS ON END-USER BENEFITS

If you're actively considering making an investment in a new estimating solution, you've already connected the dots between technology improvements and competitive advantage. You've probably seen that a more advanced estimating solution has a lot to offer your company—and that clinging to outdated tools could be a detriment to your business in the long-term. All true. But even though you and your estimators are "on the same team" when it comes to wanting what's best for the company, your priorities aren't always identical. In order to get your estimators on board with your new estimating platform, it's important to focus less on what the company stands to gain and more on enhancements to the user experience.

By addressing known pain points that have been problematic for your estimators in the past—and demonstrating how the new solution will help solve them—you can motivate users to embrace an alternative approach. Here are a few talking points about a construction-specific estimating solution likely to resonate with anyone who has an estimating or project management role:

It keeps things simple - At its best, "intuitive" software removes distractions and non-essential choices, creating a simplified user experience. Construction estimating software is designed with that in mind, resulting in an easy-to-use, user-friendly tool.

It eliminates errors - Nobody likes to make mistakes, and that includes your estimators. By eliminating the need for manual calculations, a construction estimating solution takes the worry out of producing inaccurate bids.

It supports collaboration - Research indicates that employees are happier and more productive when they can share information and work together. With a cloud-based estimating system, multiple users can access and work on the same documents—all in real time.

It reduces repetition - Doing the same thing over and over can contribute to negative feelings about the estimating job. A construction estimating tool automates many tasks, freeing estimators to focus on more rewarding work.

It works anytime, anywhere - Studies show that the ability to work outside of the office is highly valued by employees. A cloud-based construction estimating platform can be accessed and used by your estimators 24/7 from any laptop or mobile device.

It wins more bids - An awarded project is an achievement for your company and for your estimators. A construction-specific estimating platform offers the kind of speed, detail and accuracy that can result in more winning bids.

STEPS TO SUCCESS

- ✓ Focus on tangible improvements to the user experience rather than over-arching business benefits
- ✓ Identify specific estimator pain points and communicate how the new solution will help solve them
- ✓ Be prepared to field questions and concerns with a working knowledge of the technology to be adopted

TIP #3: ALLOW ADEQUATE TRANSITION TIME

Once your company has decided to move to a new estimating platform, it can be tempting to go “all in” on making the change—and expect others to follow suit. But unless your estimators have been part of the decision-making process all along, you’ll need to give them time to adjust to a significant—though positive—change, and allow for the recalibration of processes, expectations and skill sets.

The key is to consider both performative change (how to do things in a new way) as well as internal change (how people feel about doing things in a new way)—and that can take time. How much time largely depends on the tools you have in place to facilitate change, as we’ll see in Tips #5, #6 and #7.

It can also be helpful to share the details of your decision-making process with the estimating team, explaining why you chose one solution over another by comparing and contrasting various features and benefits. By clearly articulating your consideration set, you can show that you have your estimator’s best interests in mind (see Tip #2) as well as those of the business. When you position your new estimating solution as a mindful choice based on logic and projected outcomes, you’re far more likely to gain acceptance from those who are being asked to use it.

STEPS TO SUCCESS

- ✓ If possible, involve your estimating team in the evaluation and consideration of all potential estimating solutions
- ✓ Share the details of your decision-making process to achieve maximum buy-in from your end users
- ✓ Allow sufficient time for your estimators to achieve both performative (functional) change and internal (emotional) change



TIP #4: SET A TIMELINE AND STICK TO IT

We've already seen that allowing enough time for your estimators to appreciate the benefits of a new estimating tool and prepare to replace established processes and skill sets is crucial to successful adoption. But that doesn't mean that the implementation timeline should be vague or open-ended. In fact, by making your timing expectations clear—and in writing—users are able to see the "big picture" and work toward specific goals and benchmarks.

This is where your estimating technology partner can offer important support. Most solutions providers recommend an implementation timetable based on clearly defined responsibilities and sequential action steps—adjusted where necessary for each situation. A provider's knowledge of their product and past experience with client adoption is invaluable, and their input should always be a central part of your plan. That way, you can get the help you need to set realistic milestones, and use external resources and expertise to ensure that they are met.

Here is a representative sample of a timeline for cloud-based estimating solution implementation:

Implementation Steps	Time of Completion
Kickoff Meeting	
Data Migration	2 Weeks
System Configuration	1 Week
End User Training	3 Weeks
Go Live	

In this case, elapsed time from initial kick off to the go live date is approximately 6 weeks. Larger companies that conduct phased roll-outs may exceed that; smaller companies, or those organizations with predominantly tech-proficient users, may accomplish full implementation in considerably less time. What's important is to establish a definite, workable plan and hold your estimators accountable for doing their part to keep the project on track. The caveat? Be realistic about your expectations. Most companies find that when a large implementation initiative is divided into smaller, more manageable pieces, your estimators will feel a sense of engagement and accomplishment that helps them own the change.

STEPS TO SUCCESS

- ✓ Don't consider a vague timetable or open-ended implementation plan; milestone dates should be established in writing right away
- ✓ Enlist the help of your estimating technology partner to set timing goals and articulate individual responsibilities
- ✓ Break the overall implementation initiative into smaller, individually-assigned tasks to sustain progress and increase engagement



TIP #5: PROVIDE MULTIPLE TRAINING OPTIONS

Giving your estimators the input they need to use your new solution effectively is by far the most important way to ensure that they get—and stay—on board. Only when your estimators are comfortable and confident in their ability to use the new tool autonomously can you consider your investment a success, and training is the way to achieve it. Here, your new solution provider will play a pivotal role, the most reliable source of information and insight to help your estimators understand the features and benefits of the product.

But it's important to remember that people learn differently, and while one training format is effective for some, others may need another approach entirely. That's where the value of multiple training options comes in, the more varied in style and format, the better.

Depending on the skill level of your estimators, you should expect to use the following training formats either individually or in combination:

Self-Guided Tutorials - For many contractors, pre-recorded product tutorials are the most convenient way to introduce a new estimating solution to users, allowing for scheduling flexibility and self-paced learning.

In-Person Meetings - Many construction companies find that live, in-person instruction is the most efficient way for estimators to learn a new system, allowing for open dialogue and spontaneous questions and answers. Sessions can be customized to fit specific needs and can more easily accommodate larger groups.

Live Video Sessions - Remote training sessions in real time are growing in popularity, offering many of the advantages of in-person meetings without the need to travel or have personal face-to-face interactions. These sessions can be scheduled at the convenience of users and accessed via any laptop or mobile device by multiple users.

One-on-One Instruction - This option is especially useful for training an estimator responsible for training other users in his or her organization, allowing for accelerated instruction and maximum interaction.

Educators know that the greater the instructor involvement, the more motivated the student is likely to be. Remember that a good training program for your estimators is an important part of what you're buying from your software provider—and why you should take full advantage of every training option that's offered. Not only can estimating software instructors introduce key concepts and explain product features, they can also keep tabs on how much progress is being made by each potential user—and suggest remedial instruction or additional practice to address any areas of concern. Training should never be considered complete until every estimator has the confidence to use the tool independently.

STEPS TO SUCCESS

- ✓ Acknowledge that people have a variety of learning styles, and look for multiple training options from your provider
- ✓ Take full advantage of training programs offered by your estimating solution partner, including user evaluation and progress reports
- ✓ Ask your estimators to demonstrate their knowledge of the new estimating system and seek additional support when necessary

TIP #6: ESTABLISH MENTOR/ MENTEE RELATIONSHIPS

If your construction company is like most, your employees are a varied group of people, with a wide range of individual personality traits, professional experience and technical skills. Some may have been working in the industry for decades. Others may just be starting out in their careers. And all will have their own ideas about the impacts and value of your new estimating platform, either pro or con. By facilitating supportive mentor/mentee relationships, you can help your estimators find common ground and move acceptance forward. When teams of two work together and achieve a balanced point of view, they can more quickly learn the fundamentals of your new estimating system and embrace the changes it will bring.

The key is to pair employees who are most likely to complement each other rather than to team up people who are too much alike. A tech-resistant estimator who prefers a paper-and-pencil approach will benefit most from a mentor with a strong digital background, just as a tech-proficient estimator has much to gain from someone with an acute visual sense, deep industry experience or effective instructional skills.

STEPS TO SUCCESS

- ✓ Recognize that each estimator has his or her own unique view of the impacts of a new estimating solution
- ✓ Make an effort to pair employees with complementary personality traits and skill sets
- ✓ Monitor the effectiveness of the mentor/mentee relationship and make adjustments as necessary

TIP #7: ACTIVELY SOLICIT FEEDBACK AND CONCERNS

In a perfect world, your company's transition to a new estimating platform would roll out seamlessly, immune to user resistance, training issues or implementation bottlenecks. But the truth is that you may experience all three, which makes it crucial to actively encourage feedback from your estimators along the way. By listening carefully to what they have to say, and acknowledging the value of their input, you can significantly increase their involvement in the transition and their ownership of a positive outcome.

Keep in mind that your estimating software partner can play an important role in soliciting, processing and addressing feedback from new users—and many providers have a formalized new user survey process that helps guide future product development and training efforts. The key is to make sure that questions are answered and concerns are addressed right away, which helps to ensure steady engagement and better long-term acceptance from the estimating team.

STEPS TO SUCCESS

- ✓ Make sure that your estimators know that their feedback is being “heard” and is considered valuable to the effort
- ✓ Recognize that questions and concerns about new processes and tools are a necessary part of a successful transition
- ✓ Collaborate with your estimating software partner to actively solicit, record and address your estimators' feedback

CONCLUSION

It's widely acknowledged that culture—behaviors, attitudes and instincts of people—is the most challenging aspect of managing any change to the status quo, and that includes the transition to a new estimating platform. Even though the business benefits are clear, the adoption of a new estimating tool represents a significant shift in processes and workflows, and for some estimators, will require new and unfamiliar skill sets. By framing the experience as an opportunity rather than a threat, encouraging engagement and ownership early on, and providing the necessary support in each phase of implementation, you can help your estimators become knowledgeable advocates of an invaluable business tool.



ABOUT PROEST

ProEst was a pioneer of web-based estimating and preconstruction management, introducing the ProEst cloud platform in 2015. Today, ProEst provides advanced construction estimating capabilities for leading companies and public sector clients in the United States, Canada and Australia. Our cloud-based platform combines cost estimating, digital takeoffs and bid day analysis in a single powerful solution—a proven way to reduce costs, ensure accuracy and streamline pre-construction workflow.

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