ProEst®

5

Steps to Making the Move to a Digital Pre-Construction Platform

CONTENTS

INTRODUCTION

Few would dispute that advances in technology have helped companies achieve new levels of productivity and competitive advantage; in particular, early adopters of digital platforms consistently out-perform those organizations that lag behind. Yet, as a whole, the construction industry has been slow to embrace digital tools, with many contractors still relying on outdated processes and deliverables that can inhibit efficiency and growth.

In this guide, we'll identify the five steps your company should take to successfully transition to a digital estimating and pre-construction management solution—and hear from a few contractors who have embraced the cloud-based ProEst platform. By adopting a measured and sequential approach—and asking yourself key questions along the way—your move to a fully digital solution can deliver the long-term business benefits your company needs to succeed. I hope you find it of value.

Best Regards,

Jeff Gerardi

Jeff Gerardi

CEO, ProEst

STEP 1: IDENTIFY THE BENEFITS

Any contractor who values healthy profit margins has little tolerance for waste, yet many industry experts suggest that an over-dependence on paper-based estimating and pre-construction management is a major contributor to inefficiency and cost overruns.

The good news? Moving those activities to a digital platform can significantly cut costs and boost efficiency. Without the need to print, update and circulate paper assets during pre-construction, you can expect to save money, accelerate timelines, avoid errors and minimize waste. Just as important, you can eliminate the risk of paper documents being lost or destroyed, because digital replacement copies are readily available in a secure, centralized location— and can easily be accessed by any number of users any time they need to.

Accessibility was the deciding factor for Wallace Perkins, Director of Operations for California-based Vantis, who chose to replace the company's paper-based estimating processes with ProEst's cloud-based solution that let teams collaborate in real time—a significant advantage for a company whose employees are spread out across the state and often work remotely. "We can work from anywhere," said Perkins, "all without being on the company network." Asked if Vantis would ever make the switch back to doing estimates manually, Perkins had this to say: "No way. No chance."

With multiple projects in different locations, Vantis recognized the need for a better way to collaborate and connect with multi-trade subcontractors and each other.

ASK YOURSELF:

☐ Are we spending money unnecessarily on hard copies of blueprints and other documents?

☐ Is the constant revision of paper documents resulting in delays and project bottlenecks?

☐ Is a lack of digitization limiting stakeholders' ability to work remotely and collaborate?

☐ Are we wasting time trying to locate and access documents that are misfiled or lost?

☐ Do we have a backup plan for project documents in the event of a catastrophic event?

Your first step is to recognize that moving away from paper-based documentation—and embracing a digital solution instead—is a business opportunity that shouldn't be missed.

STEP 2: SELECT THE RIGHT PLATFORM

Once you've recognized the potential benefits of working with digital versions of your blueprints, drawings, reports, change orders and other paperwork, you'll need to choose an estimating and pre-construction management solution that best reflects your company's specific needs, goals, budget, user profile and work processes. Common considerations include:

Pricing and terms of use - When it comes to digital estimating and pre-construction platforms, pricing models and licensing agreements can vary widely from provider to provider. The key is to base your decision on the right mix of affordable upfront cost and flexibility down the road. ProEst's unique annual subscription model offers an unlimited number of users, unlimited phone support and unlimited cloud storage—built-in flexibility that can offer significant savings over time.

Compatibility with other programs - As more and more office functions become digitized, it's important to know that your new paperless estimating system will work seamlessly with other business applications, including accounting, payroll, human resources and project management solutions. ProEst is designed to integrate with Procore, Acumatica, Foundation, Viewpoint and other leading construction industry software, providing end-to-end project visibility and data consistency.

Ease of use - If your construction company is like most, your employees have a wide range of technical skills—from beginner to advanced—so it's wise to choose a digital solution that's simple and intuitive enough to meet the needs of everyone. ProEst features a graphical, user-friendly interface that encourages adoption and proficiency right away, the key to gaining maximum value from your investment.

Remote access capabilities - The ability to access, view, modify and share project information outside of the office—in real time—is emerging as a key selling point of digital estimating and pre-construction management. ProEst's robust cloud-based solution offers unlimited 24/7 access from any internet-enabled laptop or mobile device, giving contractors a new ability to keep projects on time and on track regardless of location.

New user training - Education for your users—and new-feature training as long as your company needs it—is an important part of what you're buying from the provider of a digital estimating and pre-construction management solution. ProEst offers multiple training options for users of all skill levels, including self-guided video tutorials, remote Zoom sessions and one-on-one in-person meetings.

Access to technical support - Moving to a digital platform will almost certainly require changes to your existing processes and infrastructure, making the quality and availability of customer service and technical support a key factor in your decision. ProEst offers live, U.S.-based support on demand from a dedicated team of technical and customer success specialists.

Provider reputation and ratings - In an age of social media and online peer reviews, it's easy to learn a lot about the experiences of other companies that have used the software you're considering. The ProEst platform has been adopted by some of the world's most recognizable construction firms, with long-term client relationships that span decades—and consistently gets positive ratings and favorable reviews by industry experts.

Bryan Riehle, Director of Preconstruction for Cincinnati-based Oswald Company, conducted an exhaustive search for a digital estimating solution to replace Excel. Over the course of six months, Riehle and the estimating team evaluated no fewer than seven estimating products, ultimately choosing ProEst, a cloud-based solution that offered full integration with their Procore management solution. A methodical selection process netted Oswald the digital estimating and pre-construction management tool they were looking for.

Oswald prioritizes process efficiency and waste reduction, employing a number of Lean-inspired tools and technologies throughout the lifecycle of their building projects.

ASK YOURSELF:

☐ Are we confident that the provider has the full endorsement of industry experts and users?

☐ Is the pricing model within budget and flexible enough to accommodate any future changes?

☐ Is formalized user training and technical support readily available as long as we need it?

☐ Will the solution integrate seamlessly with our accounting and project management software?

Your second step is to evaluate potential solutions based on price, functionality, training, support and the reputation of your software provider—all important considerations in selecting the right digital platform for your estimating and pre-construction management needs.

STEP 3: ENGAGE AND TRAIN YOUR USERS

We've seen that a formalized onboarding and training program for digital estimating and pre-construction management software is an important part of the consideration set before you commit to a specific solution. But now that you have, it's critical that you use those provider-supplied tools and capabilities to full advantage. After all, when it comes to getting the most of your new solution's features and functions, its developers have a level of insight no one else can match—and more than likely, they're eager to share what they know.

Properly introducing your team to a new digital estimating and pre-construction management system—and obtaining their unequivocal buy-in—is considered by many to be the single most important part of moving to a paperless environment. Why? Because even the most powerful digital solution can't deliver on its promises unless your users are fully onboard with the new software and sufficiently trained in its use.

For most companies, that means active participation in live, in-person or online training sessions, a format well-suited to non-technical users and large groups. Alternatively, your users can elect to train independently through self-guided video tutorials or online chats. Regardless of approach, the objective is to equip your team with the knowledge necessary to use your new paperless solution with confidence—and not be tempted to revert to a paper-based back-up system if and when they feel challenged or unsure.

Spencer Gravelle, an estimator at Blach Construction in California, advocated for multiple training options before the company transitioned to the ProEst digital platform, and once the system was in place, made sure that his team used both in-person tutorials and embedded

training videos to learn its features and functions. The flexibility of that approach, said Gravelle, helped to accelerate adoption and led to more productive estimating right away. "When there is a good educational video section within the software, it's easy for somebody to watch how to do things and basically learn the program themselves."
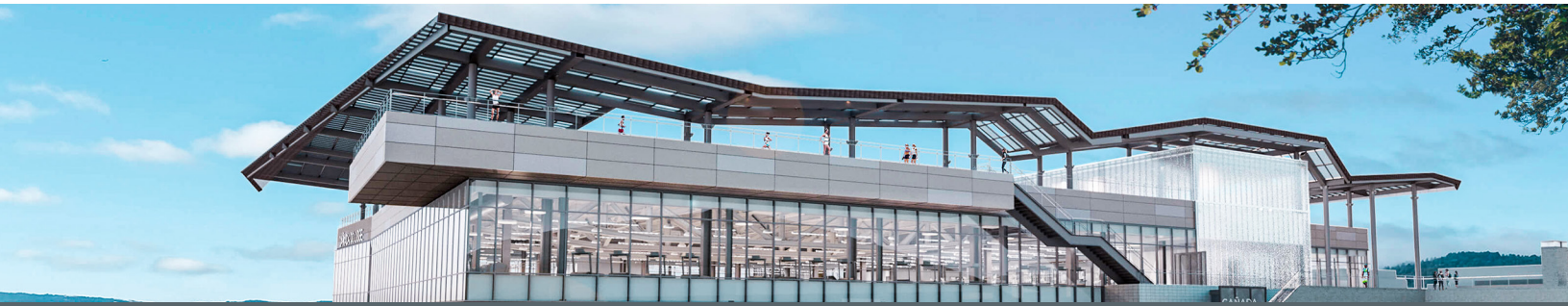
Eager to replace estimating programs they considered "old, clunky and out of date," Blach decision-makers were impressed with the speed, stability and user convenience of ProEst.

ASK YOURSELF:

☐ Have we provided sufficient transition time and training for our users?

☐ Do our users have a full understanding of what features and functions digital platforms offer?

☐ Does our provider offer a variety of training formats to accommodate different learning styles?

☐ Do our new users feel comfortable and confident enough to use the solution independently?

☐ Are we encouraging feedback from our users about training challenges and opportunities?

Your third step is to get buy-in for your new digital system from the people who will be using it—and make sure that they have the training and support they need to work independently.

STEP 4: PREPARE YOUR DATA

Every building project generates data—vital information about scheduling, subcontractor costs, materials pricing, mark-ups and the like. In a non-digital environment, that data can become disjointed and overwhelming, making it difficult to use productively. By moving to a cloud-based digital estimating and preconstruction solution, you can capture, consolidate and categorize historical data in a single, easily accessible location, the best way to fully leverage its business value.

The key is to decide what information is of value and what can be discarded as outdated or irrelevant. The data that you keep can then be transferred as digital files to a central repository that can be viewed, shared and modified as needed—all without the costly storage and inefficient search methods that paper documents require.

You may also find the need for a digital database provided by your software partner. Because a commercially available construction cost database is continuously monitored and maintained to reflect prevailing market conditions, you can be sure that inputs are accurate and up to date—the only way to know that your calculations are valid and that your numbers can be trusted.

Only when your digital database is in place and your system is properly configured can you perform limited roll outs and testing of your new digital estimating and preconstruction solution, a crucial step that can reveal any outstanding process flaws or workflow misalignment that require resolution before going live.

Peter Springsteen, Director of Preconstruction for Millenium Contractors, a family-owned civil construction company based in Indianapolis, chose to move to ProEst, citing its centralized database and digital flexibility as a key factor in their success. "It does a good job in showing us unit costs, total costs and everything else we need to know going into a bid," he said. "The nice thing is that ProEst is customizable to fit your needs, whether you're a general contractor or a subcontractor."

Prior to implementing ProEst, Millenium found that their estimating and accounting programs lacked the power and integration they needed for data-driven public bids.

ASK YOURSELF:

☐ Have we been selective in deciding which paper documents we choose to digitize and transfer?

☐ Have we conferred with our provider to determine data migration best practices?

☐ Could we benefit from the addition of a continuously updated job costing database?

☐ Do our users know how to access and use the costing database in digital form?

☐ Have we successfully performed limited roll outs to test the system before going live?

Your fourth step is to organize and prioritize your company's documents in preparation to migrate relevant data to your new digital solution. With a centralized digital database in place, you'll be ready to test, make adjustments as necessary, and go live.

STEP 5: MEASURE YOUR SUCCESS

Now that you've selected your product, trained your people, migrated your data and rolled out your solution, it's logical to think that your transition to a fully digital estimating and pre-construction platform is complete. It isn't. Documenting and evaluating your experience in every phase of adoption—and beyond—is one of the most important things you can do to ensure long-term success. After all, the cost of transitioning to a digital solution has to be an investment that pays you back (the faster the better) and the only way to measure your ROI is by keeping track of the time and money you and your team are putting in.

That said, it's important to note that significant productivity gains, which is the end goal of eliminating paper-based processes, may not happen as quickly as you'd like. The reasons can vary; in spite of your best efforts, your employees may initially be resistant to change, or require additional training. You may experience temporary data migration issues. Or find that a limited rollout of your new digital solution reveals trouble spots that need to be resolved before going 100% live.

By keeping careful track of the resources you've committed to the selection process, data preparation and migration, training, technical resolution, and rollout of your new digital estimating and pre-construction management solution, you'll have a baseline understanding of the cost/value ratio and can set realistic ROI goals as you move forward.

You'll find that getting specific feedback from your users has significant value, too, and should be fully documented in order to pass on to your provider. Be sure to solicit opinions on the quality of training, relative ease-of-use, approximate hours saved per estimate and other

relevant information. That's the kind of input your new software partner can use to provide further guidance to your employees and make any modifications necessary to align with your company's specific needs.

AstroTurf Director of Preconstruction Kim Summers was diligent about measuring the business impact of her new ProEst estimating and preconstruction solution, reporting a significant reduction in estimating time once the system was in place. "I would say we spend about half of the time on estimates as compared to previous years, or maybe a little more than 50%," she said. Summers has also seen a lift in AstroTurf's bottom line. "Now that we've fundamentally changed how we handle our estimating and proposal process we are definitely ahead of where we were last year."

> *A buyout necessitated new levels of transparency and accountability for AstroTurf, requiring an estimating system that eliminated workflow "silos" and supported collaboration and consistency.*

ASK YOURSELF:

- ☐ Are we prepared to document and measure the resources required for implementation?
- ☐ Are we being realistic about our timeline expectations for productivity gains?
- ☐ Do we have a workable system to evaluate time and cost savings over time?
- ☐ Have we actively solicited feedback from users and shared that information with our provider?
- ☐ Overall, are we satisfied that we made the right choice or know how could it be improved?

Your fifth and final step in the move to a digital environment is to document your experience and accurately measure your company's use of resources as you make the transition and begin to use your new solution full time.

CONCLUSION

There's little doubt that making the move to a digital estimating and pre-construction management system is less a matter of "if" than "when," and forward -thinking companies in every industry are already enjoying the business benefits that come with digital platforms.

In spite of the productivity gains inherent to digital technology, the construction industry continues to lag behind when it comes to its adoption, often due to systematic resistance on the part of both employees and company decision-makers. For those who are willing to embrace the shift to digital solutions, the opportunity for cost savings and increased productivity is both immediate and real.

The five steps outlined in this report will help your construction company successfully transition to a digital estimating and pre-construction solution, eliminating the dependency on less efficient paper-based documentation and processes. By identifying the business opportunity, selecting the right solution, preparing your data, training your people and monitoring your progress, you can join thousands of contractors who now work with the "digital advantage"—and be perfectly positioned for future success.

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.

Visit www.proest.com to learn more