



EXECUTIVE INSIGHT



ProEst®

**Making the Move to ProEst:
A Real-World Implementation Story**

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INTRODUCTION

Over the course of the past thirty years, I have been involved in thousands of ProEst implementations, and I can say with certainty that no two of them have been exactly alike. Yet there are clear commonalities in the implementation process that I think are important to share.

I've found that most new clients have many of the same questions, tackle many of the same issues and have very similar definitions of success. That has taught us a lot about seeing ProEst in the "real world" of actual client environments, and helped us to standardize ways in which our software can become a valuable business tool for every company that chooses ProEst as a technology partner.

In this report, we'll look at how Nova Scotia-based DORA Construction got started with ProEst—a journey that began early in 2019 when executives replaced a legacy estimating system with the ProEst cloud platform. I think their story helps to demonstrate how our six-step implementation process is designed to work—and can serve as a valuable preview of what your company can expect as a new ProEst client.

Best Regards,



Jeff Gerardi

CEO, ProEst

STEP 1: KICK OFF MEETING

Setting the stage for a successful ProEst implementation.

The Kick Off meeting is the official start of the implementation process. ProEst team members brief client representatives on each phase of implementation, setting expectations for timing and determining roles and responsibilities. The ProEst team answers questions and addresses concerns—and stakeholders leave with a mutually agreeable “go forward” plan.



By the time Josh Dykens and his DORA Construction colleagues sat down for their 3:00 Zoom call with the ProEst implementation team, they were more than ready to put the software to work, and eager to finalize the last few details of their new ProEst partnership. Joining him in the conference room were the same people who had coordinated the company's search for a new estimating solution, an intensive four-month exploration of available options conducted by Google search and word-of-mouth recommendations. For Dykens, the collaboration was invaluable; each of them brought a different perspective to what the "right" software would ultimately mean for DORA, and each had to agree on the final pick.

"Everybody had their own area [of expertise] and picked their favorites," said Dykens. "Then they had to sell it to the rest of the group. We had six people who reviewed everything, made a list of pros and cons, and passed along recommendations."

In the end, the short list of estimating solutions under consideration was even more abbreviated than they originally expected. The company had decided to replace their legacy estimating, project management and accounting software at exactly the same time—an ambitious undertaking, says Dykens with a smile, that held its own challenges—and all three platforms had to work together. With Procore in place for project management and Acumatica being considered for accounting, DORA knew that they needed an estimating platform that was cloud-based, a factor that narrowed the field considerably. When the DORA team saw the online ProEst demo several months into their search, they agreed that the software's interface was an essential upgrade to the solution they had been using for the past thirteen years, which, according to Dykens, was anything but simple.

“ We wanted something that was easier to use, presented data better, and had more automation to it. ”

— Josh Dykens, DORA Construction



“I’ve been working with it for a long time, so I knew how to use it,” said Dykens of their Sage software, “but when someone new came in, there didn’t seem to be any logic to it. There was always a steep learning curve, and we wanted something that was a lot easier to use, with more automation to it.”

Also on the Zoom call that afternoon—dialing in from the ProEst offices in San Diego—was Josh Flowers, Director of Support, and Jeff Gerardi, CEO, two members of the ProEst team who had been engaged with DORA from the time of their first inquiry several months before. With pricing details worked out and a signed contract in place, the meeting, recalls Gerardi, was straightforward, upbeat and relatively brief.

“Josh and his team at DORA know what technology brings to the table,” said Gerardi. “They were clear about their expectations, and we very quickly developed a great working relationship. The Kick-Off meeting was a welcome milestone for all of us.”

In many ways, DORA was the ideal client for ProEst: they had proactively identified the issues

they needed to resolve, they had been rigorous in their search for the right software replacement, and they were well-versed in the benefits of a cloud-based platform in general. But mostly, says Troy Simon, the ProEst Implementation Manager assigned to DORA, they demonstrated committed executive leadership from the outset, which he considers the biggest single contributor to implementation success. "I don't think we talk about leadership enough," he said. "I can't over-emphasize how important it is."

As the implementation lead, Simon was responsible for making ProEst work flawlessly in the DORA environment, a role that involved multiple checklists, scrupulous note taking and a thorough understanding of the company's specific business focus. But the essential first step, says Simon, is to introduce primary project stakeholders on both sides of the table. The Kick-Off call clarifies who will be acting as executive sponsors, implementation managers and project admins, the latter being those who are most heavily involved in daily tasks—and training—as the project moves forward.

"Once we identify roles in the process," said Simon, "we go through and do a recap to validate the type of software they're using now and confirm the type of work they do, just to make sure that we understand their business. Are they a design-build guy? Are they a site work company? A concrete specialist? We want to see if they self-perform, or sub it all out, things like that. Then, we reconfirm the client pain points. What is the problem you're trying to solve? Why are you moving from the solution you have now? After all, they have gone to some trouble and expense to make the change to a new estimating system, and we want to make sure they are happy customers."

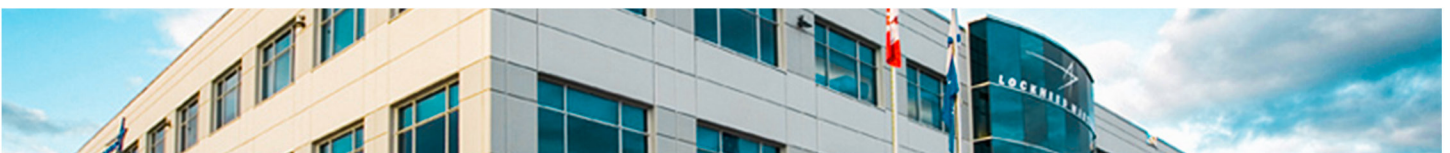
“ We reconfirm the client pain points. What is the problem you’re trying to solve? Why are you moving from the solution you have now? ”

— Troy Simon, Director of Client Services



The real focus of that dialogue, says Simon, is to help each client successfully navigate what he calls the inevitable “trough of disillusionment,” a temporary dip that can sometimes occur following the initial excitement of signing on for a new solution. By making sure that ProEst solves the most pressing issues, he explains, he can help clients validate their decision-making and continue to see value in their investment, quickly climbing up the other side of the “trough” with an increasingly positive perspective.

As Implementation Manager, Simon is also careful to conclude each meeting with milestone dates and “next steps” for everyone with a stake in the outcome. An added bonus? When, as in DORA’s case, remote Zoom technology is used, each live meeting is recorded and available for playback, giving those unable to attend a firsthand meeting experience and a convenient way for attendees to review what was discussed and decided.



STEP 2: MIGRATE DATA

Creating a single, robust data base for every estimating activity.

While volume will vary, the overwhelming majority of new ProEst clients require some form of data migration and need active support from the ProEst implementation team to address issues related to system architecture and integration requirements. In this step, all relevant data is imported and consolidated to create a single, robust data base that can be leveraged for future estimating activities.



Like most new ProEst clients, DORA chose to import data from their current estimating system—cost code assemblies, make-ups and other legacy information—that had served them in the past, rather than rely exclusively on a commercial database provided by ProEst. But first, said Josh Dykens, they took the time to make sure that all of their inputs were relevant, up-to-date and absolutely necessary. “We wanted to slim down the data,” he said. “We went through to see what we could eliminate and what we could simplify.” Only then did the DORA IT department transfer the data from their old system to the ProEst team.

“In my view, the client’s database is the most important part of the system,” said Simon. “If we can import every client’s data, we will have very happy clients.” That process, according to Simon, typically can take from one to two weeks, but for DORA, data migration was even faster; once their “slimmed down” information was handed off to ProEst for implementation, it was up and running in the system within a few days. Even better, Dykens noted, the transfer was a hands-off process that took place entirely behind the scenes, freeing DORA stakeholders to focus on the demands of their business.

“ We think about more than estimating. We look at how ProEst is fitting into our clients’ ecosystem overall. ”

— Jeff Gerardi, ProEst CEO



ProEst CEO Jeff Gerardi, who handled the data import phase, explains the process, which can differ from client to client. “Coming from Sage, DORA had a list of labor and materials costs that served as a starting point for their estimates, which was exported to Excel,” said Gerardi. “Our development team took that file and imported it into our system to capture DORA’s historical work.” He notes that the ProEst implementation team takes the long view of imported data, using the migration phase to make sure that coding is compatible with any project management and accounting software integration requirements down the road. “We think about more than estimating,” he said. “We look at how ProEst is fitting into our clients’ ecosystem overall.”

Like Simon, Gerardi gives high marks to the DORA team for taking time to streamline their data set, especially as estimating inputs can become muddy with prolonged use. That, says Gerardi, is often the result of ongoing system “tweaks” by multiple users over the years—causing errors, inconsistencies and needless complication for estimators. “This was a chance for DORA to step back and hit the reset button,” he said. “What’s the best, cleanest, simplest data set to move forward with? Construction is complicated enough. We don’t need the client’s database to add more complexity.”

“Construction is complicated enough. We don’t need the client’s database to add more complexity.”

— Jeff Gerardi, ProEst CEO



For Troy Simon, migration isn't really complete until the efficacy of the data has been validated by the client, usually with a check-in prior to configuring the system itself. "After the DORA data was migrated, we did a quick database validation call with Josh," he said. "He looked through the data and confirmed that everything was okay, and then we scheduled configuration."

Simon uses his initial validation process to look for answers to some basic questions: Are the workflows set up right? Do we have the database mostly configured? Have we built some assemblies? Have we added some pricing? Have we imported their accounting codes and mapped them correctly? With the DORA team's approval of the imported database in place, it was time to move on to the configuration of the ProEst system.



STEP 3: CONFIGURE SYSTEM

Tailoring ProEst to meet client needs and preferences

The third step in the implementation process is to tailor the ProEst platform to align with the client's specific business needs, user preferences and work processes—resulting in a system that accelerates adoption and maximizes productivity. To succeed, the ProEst implementation team must understand the client's requirements, and enable any future additions or adjustments to the platform.



For DORA Construction, June 17, 2019 was a big day. Troy Simon had scheduled a 90-minute Zoom call to walk through the configuration of the ProEst solution, and the team had some important decisions to make. “They [the ProEst team] asked us what we would like to see happen in the system,” said Josh Dykens, DORA’s Executive Sponsor. “We knew that we wanted to start fresh, so we started new with a lot of our assemblies, cost code structures, items in the inventory list, things like that.”

Troy Simon, ProEst’s Implementation Manager for the project, was impressed with DORA’s willingness—and ability—to reimagine their estimating process after years of making do with a legacy system, a quality he attributes to steady leadership from DORA executives. There will always be a few outliers, he explained, people who remain attached to the “old way” of working, but it’s essential for company executives to make their expectations clear.

“It’s important for every new client to have a 100% buy-in mentality, and to be fully committed to change,” said Simon. “I think when the key stakeholders are able to say: this is what we’re doing; get on board or get out, you’re going to have high-level success.” For Simon, Josh Dykens exemplified the kind of top-down leadership ProEst implementation success depends on: “If he had homework, he did it. If he had meetings, he kept them. And he had the estimators in the meetings with him. If you don’t have the leadership, you’re dead in the water.”

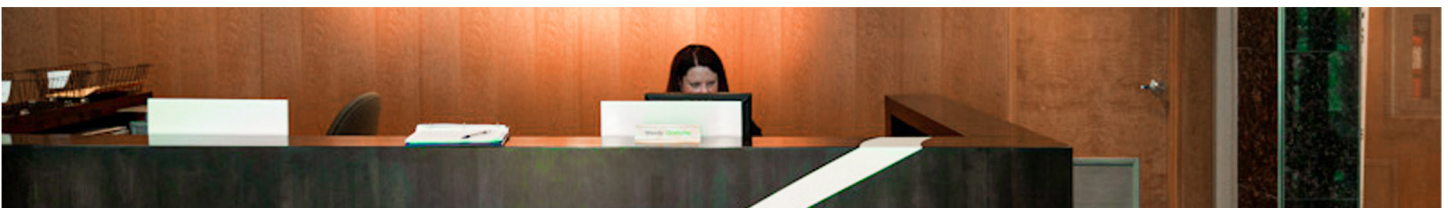


“ From the top down, DORA leadership has held their team accountable. That’s what makes a successful implementation. ”

— Troy Simon, Director of Client Services



With the core DORA group in attendance—Josh Dykens, Tristan MacDonald, Arad Gharagozli and Clayton Bartlett—Simon used a detailed agenda to cover the details of the system set-up, getting agreement on core issues as the meeting progressed. “On the configuration call, I guide them through the set-up, but I let them drive,” he said. “At that point, it’s mostly me asking questions of them: Are we setting it up correctly? Ultimately, says Simon, the goal of the configuration call is to make sure the ProEst system accurately reflects who the company is and how and where they work. He knows from experience that every contractor approaches things a little differently, and that even internal parameters can differ if the company has projects in multiple geographies. “In DORA’s case, as a Canadian company, they may have projects in many provinces, and material and labor costs in each area won’t be the same.”



“ Configuration is where a lot of important decisions are made. If we can all get on the same page here, we’re more than ready for the next step. ”

— Jeff Gerardi, ProEst CEO



“The configuration step is our last, best chance to make sure that ProEst software is intuitive for a new user,” said Jeff Gerardi. “Inevitably, there will be tweaks here and there down the road as the system moves into production mode, but configuration is where a lot of important decisions are made. If we can all get on the same page here, we’re more than ready for the next step.”



STEP 4: TRAIN USERS

Accelerating the learning process with flexible options.

Training new users is a crucial part of successful client onboarding. ProEst offers a variety of training options, all conducted by experienced ProEst Implementation Managers. New users will participate in classes which include a Q&A and recap of the previous session. They are encouraged to practice independently, ask questions and request additional training support as needed, using the newly completed system configuration.



On June 24, DORA's Josh Dykens gathered the six members of his estimating team in the company's conference room for their first ProEst training session. It had been a week since the system had been configured—then tweaked—to align with DORA's use requirements, and with all of the necessary sign-offs in place, it was time for the DORA team to get direct, hands-on experience with ProEst software populated with their migrated data.

ProEst Implementation Manager Troy Simon ran the meeting from his office in suburban Atlanta, starting, as always, with a basic introduction to navigating the software. Due to Covid-19 restrictions, the meeting was being conducted entirely via Zoom, and was scheduled to run the usual 90 minutes. But even going forward, Simon predicts that online training session will be the preferred learning format. "90 percent of our clients do their training online," he said. The key is to engage new users, evaluate their abilities and give them the freedom to experiment with what may be unfamiliar processes.

"Since it was an introductory class, I jumped right into general navigation, how to add an estimate, an introduction to take offs and what every button in ProEst does," said Simon. For illustration purposes, Simon uses a sample estimate and lets session attendees "drive" throughout the session, coaching them through each step and offering guidance as needed. That kind of interaction, emphasizes Simon, is an essential part of the learning process, and engagement is key to success. In all, DORA estimators met with Troy Simon seven times once a week over a period of eight weeks over the summer; between training sessions, they were assigned tasks to work on independently in preparation for the next class—and they never failed to deliver.

Homework, says Simon, is an essential part of the training process, and he makes his expectations clear. "It can be something simple like watching the videos, or finishing up their system settings, or building an estimate template, but there are usually several

items of homework after each session,” he said. If a specific homework task hasn’t been completed, Simon leaves the box unchecked and waits for the team to catch up. “Clients get busy with other things,” he said, “but at the end of the day, they have to finish every assignment before going live,” he said. The reasons are clear: homework gives new users the practice—and the confidence—to use ProEst independently once stakeholders agree that the system is ready to launch.

For DORA, learning the ropes of their new estimating system was only part of the task; because they had chosen to implement ProEst, Procore project management software and the Acumatica accounting solution at the same time, training on all three systems was taking place more or less simultaneously. That says Simon, was a big ask for new users, and not one that in hindsight, neither Simon nor DORA would necessarily recommend. “It was a bit ambitious,” said Dykens of the three-pronged effort. A better approach, everyone agreed, was to adopt the new platforms in phases; ultimately, DORA chose to integrate ProEst and Procore and add Acumatica to the mix down the road.

“ You can always tell when an implementation will go well. Engagement is the most important factor. ”

— Troy Simon, Director of Client Services



All in all, Simon gives DORA high marks for completing assigned tasks on time and being ready for the next phase of ProEst training—a level of engagement that predicted their success with the ProEst platform. “You can always tell when an implementation will go well,” says Simon. “Right after the configuration call, Josh took it upon himself to start working.”

Just as important, says Simon, is leadership from the top. In many ways, says Simon, Josh Dykens—who led the move to ProEst from the very beginning—was the ideal “student,” proactively learning and using the new system on his own prior to each training call. Even better, he was able to transfer his knowledge of ProEst to the rest of his team, providing on-the-spot instruction and feedback as other DORA estimators became familiar with the ProEst process. After each one-on-one with Simon, Dykens held internal sessions with his stakeholders to reinforce their skills. Not everyone in the organization, explained Dykens, has the same ability and comfort with technology. In fact, there were a few “old school” outliers who he suspected were transferring their Excel calculations to the ProEst platform mid-stream. His task? To ensure that the skillsets of both current and future DORA estimators were aligned with the more advanced ProEst estimating platform.



STEP 5: DECISION TIME

Actualizing the power of ProEst in the client environment.

The end point of implementation is the “go live” decision, typically based on a meeting in which all stakeholders can share their thoughts, experiences, questions and concerns about the implementation process in an open, interactive, problem-solving forum. Feedback obtained will inform next steps: determining if the client is ready to “go live,” or if there are any outstanding issues that need to be remediated with further training, system re-configuration and/or other ProEst input and support. Based on the results, ProEst is ready to go live in the client environment.



By the end of July, DORA estimators were eager to put ProEst to work; Josh Dykens was confident in his team's ability to use the software, and based on the results of his training sessions, Troy Simon agreed that the DORA team was just about ready to be "turned loose." Before any of that happened, however, one final Zoom call was scheduled, pared down to include just Dykens and Simon. The goal: to confirm that training and configuration was complete, that the system was performing as expected and that both teams felt sure that they were ready to go live. "Before we go live, we have a prep call through their system to make sure that everything is turned on, reporting is set up, the estimate templates are ready—one final check," said Simon.

“It’s better for everyone when a client gets right to work and wants to push things forward.”

— Troy Simon, Director of Client Services



It was during their month-long “decision time” period, said Simon, that DORA began using the system in earnest, entering estimates, checking that calculations were accurate and verifying that everything was working as it should. System testing included comparing bids produced with their previous methods to ProEst-generated estimates—and making sure that the results matched up. By this time, integration with Procore was complete, and the team conducted trial runs of moving project information from ProEst to Procore, all of which says the DORA team, went off without incident.

"The decision to go live is what everyone has been working toward," said ProEst's Jeff Gerardi. "The platform has been configured, integrations have been tested, and both admins and end users have been trained. What really matters is that the team is comfortable leaving their old methods behind to move forward with a new, more efficient and collaborative estimating process."



STEP 6: GO LIVE

Ensuring the long-term success of every client.

In many ways, the conclusion of the ProEst implementation cycle marks the beginning of an important new chapter of client support, interaction and care. With ProEst serving a vital new role in each client's daily estimating activities, an important business partnership has emerged, and the company will continue to contribute insight, experience and knowledge of the ProEst platform to help ensure their long-term success.



In October, nearly six months after kick-off and eight weeks after the final configuration call with Josh Dykens, Troy Simon was anything but finished with the DORA Construction team. Following training and the official “go live” date, there had been a number of conversations and email exchanges with Dykens, mostly to clarify a usage issue or to get help with a configuration detail, but compared to the hands-on intensity of the training period, DORA estimators were using ProEst just as Simon had hoped: independently. Technically, Simon had handed off the new client to account services, but given that he had built a good rapport and positive relationship with Dykens and his estimators, Simon wanted to be sure of one thing—that the DORA team was happy.

According to Josh Dykens, they were. And he gave high marks to Simon for getting them where they needed to be. “Troy was great,” he said. “We always knew what we had to do and what was going to happen next to keep the process going.” Dykens and his team also came to appreciate the online meeting format, a logistical necessity during business shutdowns that delivered a number of unexpected benefits. “Because every meeting was conducted on Zoom,” he said, “everything was recorded and available to anyone who couldn’t attend.” Just as important, next steps and requests were always laid out and fully documented—a boon for busy estimators and project managers who were learning ProEst in addition to their usual responsibilities.

“ We always knew what we had to do and what was going to happen next to keep the process going. ”

— Josh Dykens, DORA Construction



Simon notes that moving forward, there will be fewer internal hand-offs and more participation from the ProEst account management team early in the implementation process—including the initial kick off call and subsequent data migration discussions. The goal is to increase awareness of each client's needs and expectations across all teams from day one, which in many ways, he says, stays true to ProEst's culture of open communication and "client-first" point of view.

Simon considers higher levels of collaboration between the ProEst implementation and account teams a major benefit for all involved. "Once we go live, each client transitions from the implementation team to the account team, which becomes their main source of contact," he said. By involving the account team from the beginning, relationships develop organically, and any extra scrutiny of the implementation process helps things run smoothly.

"Getting the account manager involved earlier helps create rapport, and trust, and makes for a better client experience," he said. "During training, we're figuring each other out in addition to discussing ProEst. Having another set of eyes on implementation helps to alert us to any issues that need to be resolved."

“ ProEst makes every development decision in the best interest of the user. We want to anticipate needs. ”

— Troy Simon, Director of Client Services



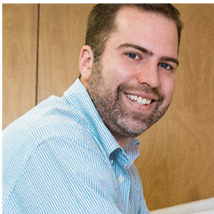
Ultimately, says Simon, it all boils down to creating an outstanding customer experience—even before ProEst goes live in the client environment. “What makes ProEst great for the customer is the same thing you could say about a lot of the great tech companies: that they always put the user experience first,” said Simon. “In technology, the companies that really land it fulfill the current needs of the customers, but are also in constant pursuit to surpass what they’ve already done and improve on that—improve on the processes, improve on the ease of use, improve on the functionality. We address what has to be addressed, while at the same time we’re expanding on needs customers may not yet even be aware of. When we show them what we’ve added or changed, they often say, “that is better.”

For DORA Construction, that’s the kind of ongoing product innovation that they signed up for, and why they expect their ProEst partnership to be a lasting one. “The fact that ProEst is in the cloud was important to us,” Dykens said. “Even before Covid, we knew that we wanted to take our business online. There was a big server in there that only stays current for so long, and then there’s a huge cost to replace it.” And then there’s the problem of security. “We like to think that it’s great here, but they’ve got redundancy we feel good about, to have that space allocated.” Remote access has been a benefit too, giving those on the ProEst platform a new ability to work from out-of-office locations even when other construction firms all but shut down. “Especially on the estimating side, we were able to keep working. We didn’t skip a beat,” he said.

For ProEst CEO Jeff Gerardi, anticipating what can—and should—come next for ProEst clients is what building a relationship is all about, and central to the values of the company. “We will continue to push the envelope to allow for better communication and productivity through the use of our technology,” he said. “We will also continually look for ways to improve our client interactions, from the very first kickoff meeting to the long-term management of their accounts. We are truly passionate about the mutual success of our company and the people who count on our product. For us, one doesn’t happen without the other.”

ABOUT DORA CONSTRUCTION

Founded in 2003, DORA Construction is a commercial contractor based in Halifax and Sydney with roots in Atlantic Canada. With 100 full-time employees and a seven-person estimating team, the company delivers projects that range from large commercial developments to historic restorations across Nova Scotia, including Cape Breton. DORA works on a wide variety of project types, including retail, residential, education, industrial, green building and First Nations construction.



Josh Dykens
PROJECT MANAGER

My favourite downtime activity is target shooting. I find it challenging and relaxing.



Donald Macdonald
PRESIDENT

My three kids are quite active in sports so a lot of my time is spent with them. My perfect day is exploring rural Nova Scotia – outdoor activities, the music, the food, the people, the water – I enjoy everything about it.



Ron Cahoon
CHIEF ESTIMATOR

For years I've been involved in restoration, it's a specialty. I've managed high profile restorations like the Halifax Glebe House and Lunenburg's St. John's Anglican Church.



Russell Briand
DIRECTOR OF CONSTRUCTION

I have had the luxury of golfing numerous world class courses in Canada and the U.S. – every time I travel I make it a point to see if there is a PGA course nearby and play it.



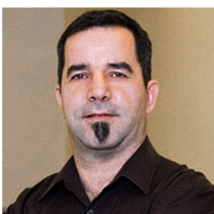
Steve Hoyrl
ESTIMATOR

I try to play as much golf as I can during the summer months. I enjoy being outside and the competitive side to the sport.



Jamie Miles
CHIEF FINANCIAL OFFICER

I keep busy with my family—minor hockey and animal rescues top the list.



Tony Lajo
OPERATIONS MANAGER

My perfect day is one that includes my three adult kids having dinner with me.



Clayton Bartlett
SENIOR VICE PRESIDENT

I enjoy boating and swimming in the summer and fall on the Mira River, bonfires in the summer evenings, and skating in the winter time. Spending time with my grandkids and watching them play hockey is my favourite.