

## BEST PRACTICE BULLETIN #3

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### **SUBJECT: BEST PRACTICES FOR SELECTING SOFTWARE FOR A CONSTRUCTION COMPANY**

Selecting the right software for your construction company is a crucial decision that can significantly impact your operations and productivity. To ensure you make an informed choice, follow these best practices when evaluating and selecting software:

#### **Define Your Specific Needs**

**Objective:** Clearly outline your software requirements and prioritize them based on their importance to your business operations.

1. Identify the specific tasks and processes you need the software to support (e.g., project management, cost tracking, scheduling).
  - a. Have a realistic view of the needs of the company
  - b. Evaluate current people and processes (Standard Operating Procedures) before defining scope
2. Prioritize these requirements based on their impact on your daily workflow.
3. Determine how much you're willing to invest in software to ensure you stay within financial constraints.
  - a. Set a clear budget that considers both the upfront costs and ongoing expenses (e.g., licensing, maintenance).
  - b. Be prepared to adjust your budget within reason to accommodate software that meets essential needs.

#### **Research Available Options**

**Objective:** Identify potential software providers

1. **Market Analysis**
  - a. Identify leading software solutions in the construction industry.

- b. Consider both specialized construction software and general project management tools.

## 2. **Read Reviews and Case Studies**

- a. Look for user reviews, testimonials, and case studies from similar companies.
- b. Assess the software's reputation and reliability.

## 3. **Consult Industry Peers**

- a. Network with other construction companies to learn about their software experiences.
- b. Attend industry conferences and webinars.

## **Evaluation Process**

**Objective:** Consider and weigh the multiple factors that determine the appropriateness of software options for the determined requirements

1. **Features:** Assess the features and functionalities offered by different software options to ensure they align with your requirements.
  - a. Create a feature checklist based on your prioritized needs.
  - b. Compare different software solutions to see how well they match your checklist.
2. **Ease of Use:** Choose software that is user-friendly, especially if you or your team members are not tech-savvy.
  - a. Request product demos or trial versions to assess the software's user interface and intuitiveness.
  - b. Seek feedback from potential users within your company.
3. **Scalability:** Ensure that the selected software can grow with your business as your needs evolve over time.
  - a. Evaluate whether the software can handle an increase in the volume of projects, users, or data.
  - b. Check if there are options to upgrade or expand the software's capabilities without significant disruption.
4. **Integration Capabilities:** Determine if the software can seamlessly integrate with other tools and systems you use in your construction processes.
  - a. Identify the software's compatibility with your existing software stack (e.g., accounting software, project management tools).
  - b. Consider open APIs or pre-built integrations to facilitate data exchange between systems.
5. **Data Management:** Prioritize the security of sensitive project and financial data, especially if you handle confidential client information.
  - a. Inquire about the software vendor's security measures, including encryption, access controls, and data backup.
  - b. Understand ownership of data, where it is stored and how it is protected
  - c. Ensure compliance with industry-specific data security standards or regulations.

6. **Evaluate Cyber-security:** Ensure that the new software complies with your organization's security policies and any relevant regulatory requirements.
  - a. Look for strong encryption standards for data and the support of Multi-factor authentication
  - b. Look for certifications such as ISO 27001, SOC 2, or other relevant security standards and the vendor has a robust incident response plan in place.
7. **Evaluate Software Support:** Ensure you have access to reliable support in case you encounter issues or need assistance with the software.
  - a. Inquire about the vendor's customer support options (e.g., phone, email, chat).
  - b. Assess the cost of support, including any subscription fees or maintenance agreements.
8. **Avoid Excessive Customization:** Minimize customization efforts, as they can lead to long-term dependency and compatibility issues.
  - a. Opt for off-the-shelf software that aligns with your requirements as closely as possible.
  - b. If necessary, adapt your processes to fit the software's existing features rather than heavily customizing it.

## Decision Process

**Objective:** Conduct a process that allows for proper evaluation of options based on criteria outlined in Step 3.

9. **Investigate Software Reputation:** Research the software's reputation within your industry to gain insights into its performance and reliability.
  - a. Read online reviews, forums, and testimonials related to the software.
  - b. Consult industry peers and colleagues to gather feedback on their experiences.
10. **Seek Colleague Recommendation:** Tap into the knowledge of your colleagues and peers who may have firsthand experience with construction software.
  - a. Ask colleagues about the software they use and inquire about what they like or dislike about it.
  - b. Request recommendations from industry associations or forums.
11. **Read Reviews:** Utilize online resources to access comprehensive software reviews and analysis.
  - a. Explore reputable websites, blogs, and industry publications that offer software reviews.
  - b. Pay attention to reviews that discuss how the software meets the needs of construction companies.
12. **Try Before You Buy:** Take advantage of software trials or demos to gain hands-on experience with potential solutions.
  - a. Request free trials or demos from software vendors to assess functionality.
  - b. Involve key team members in testing to gather multiple perspectives.
  - c. Test everything, even the functions you might assume are included (Example: Manitoba tax).

13. **Trial Feedback Analysis:** Analyze the feedback and insights gathered during the trial period to make an informed decision.
  - a. Collect feedback from all relevant team members who participated in the software trials.
  - b. Identify any pain points or challenges encountered during the testing phase.
14. **Long-Term Viability:** Assess the long-term viability of the software vendor and the product itself to mitigate the risk of software discontinuation.
  - a. Investigate the vendor's financial stability and track record in the industry.
  - b. Ask about the software's roadmap for future updates and improvements.
15. **Contract Terms and Licensing:** Review the contract terms and licensing agreements carefully to understand the terms and conditions of usage.
  - a. Consult legal counsel, if necessary, to ensure you fully understand the contractual obligations.
  - b. Clarify any questions regarding licensing, renewal costs, and termination clauses.
  - c. Understand the pricing model, especially if subscription based. Understand future subscription costs and try to negotiate maximum future subscription increases.

## Implementation Plan

**Objective:** Implement a change management strategy for the new software in an organized fashion to minimize disruption and maximize the benefit of the new software.

1. **Engagement and Involvement:**
  - a. Early Involvement: Involve implementation staff early in the process to ensure they understand the reasons for the change and can provide valuable input.
  - b. Feedback Mechanisms: Create channels for staff to voice their opinions, concerns, and suggestions, ensuring they feel heard and valued.
2. **Clear Communication:**
  - a. Communication Plan: Develop a detailed plan that outlines how, when, and what information will be communicated to the implementation staff, including the benefits of the new software, how it aligns with organizational goals, and the impact on their roles.
  - b. Regular Updates: Provide regular updates on the implementation progress, addressing any emerging concerns and celebrating milestones.
3. **Training and Education:**
  - a. Comprehensive Training: Offer thorough training sessions tailored to the needs of the implementation staff, ensuring they feel confident using the new software.
  - b. Knowledge Resources: Provide access to resources such as user manuals, online tutorials, and FAQs.

#### 4. **Support Systems:**

- a. **Dedicated Support Team:** Establish a support team specifically for the implementation staff to address technical issues and provide guidance and encourage a peer support system where staff can help each other and share best practices.
- b. **Helpdesk Services:** Offer helpdesk services that staff can contact for immediate assistance during and after the implementation phase.

#### 5. **Ensure Cyber-Security:**

- a. **Implement Access Controls:** Assign permissions based on user roles within the organisation
- b. **Integrate with Existing Security Tools:** Verify compatibility with your endpoint protection solutions.

#### 6. **Empowerment and Ownership:**

- a. **Empower Champions:** Identify and empower software champions within the implementation staff who can advocate for the software and assist their peers.
- b. **Role Clarification:** Clearly define the roles and responsibilities of each team member in the implementation process and involve staff in decision-making processes related to the implementation.

#### 7. **Recognition and Motivation:**

- a. **Acknowledge Contributions:** Regularly acknowledge and appreciate the efforts and contributions of the implementation staff.
- b. **Incentives:** Consider providing incentives or rewards for staff who show exceptional commitment and performance during the implementation.

#### 8. **Monitoring and Feedback:**

- a. **Ongoing Monitoring:** Continuously monitor the implementation process and gather feedback from the staff to identify and address any issues promptly.
- b. **Adaptability:** Be open to adjusting plans based on the feedback received to ensure the implementation process remains effective and staff concerns are addressed.

### **Conclusion:**

By following these best practices, you can streamline the process of selecting the best software program for your construction company. Remember that choosing the right software can enhance efficiency, improve project management, and contribute to your overall success in the industry.