MiTek®

A guide to implementing **estimating software** into your company

Laying the foundations for your success

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Implementation planning made easy

Estimating a construction project is time consuming. It takes specialized skills and attention to detail, and the success of your entire project hinges upon the accuracy of your estimate. It's no surprize that the industry is looking to estimating software to help streamline this critical component of the construction process.

However, implementing software into your company can be challenging and may seem daunting. Though it is hard work, we've created this guide to make it easier.

We'll walk you through some of the aspects you can take into consideration when planning to bring estimating software into your company, whether you're new to rolling out software or changing providers.

When you successfully implement your estimating software, you'll be perfectly positioned to reap the benefits it has to offer. By including the points within this guide into your implementation plan, you can improve the way you and your team work, speed up your estimating process, increase your accuracy, bid for more work, and win more jobs.
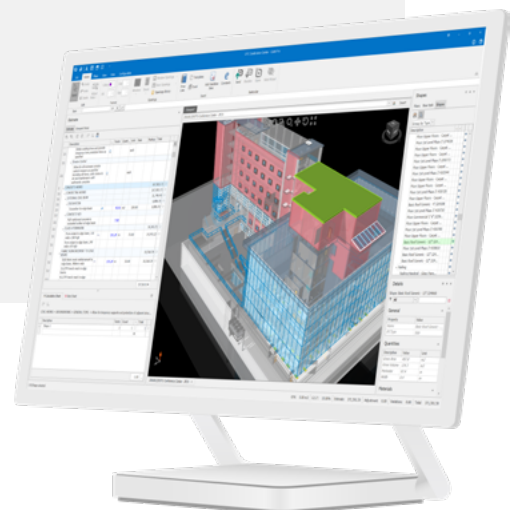
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Planning for change

In the words of Benjamin Franklin, "If you fail to plan, you plan to fail". Implementing new estimating software into your business requires a pragmatic and considered approach. You may come across some challenges you'll need to be aware of and address, in order to give your business and staff the best opportunity to succeed. We've outlined some elements to take into consideration in the planning phase.

Create a project team

One of the first things you should consider is putting together a team of people to drive the project. This team should consist of your software 'champions', your power-users who will be able to proficiently use and advocate for the new software. Also include representatives from your executive and IT teams, your lead Estimator, Quantity Surveyor, or Estimating Manager, and other cultural influencers within your team.

These are the key people you will need to help with implementation, testing and troubleshooting before deployment, assisting staff in learning the software, and encouraging staff to use the new system.

During your decision making process, when you are evaluating the right software for your company, you should also involve the end-users of the software. While they may not be members of the official project team,

they are best situated to explain the challenges and problems, and help determine the best solution. They will be instrumental throughout the evaluation process, so should be included in trialing the software before a final vendor is chosen.

Most software suppliers can set you up with a trial to assist in your evaluation process and enable you to experience the features and functionality of your candidate systems first hand.

Review your processes

The introduction of new estimating software may necessitate changes in your existing processes or the introduction of new ones. Take a look at your processes and be aware of any bottlenecks or areas that have the potential to be more efficient or effective.

It's easy to get caught up in the day-to-day operations of your company, so taking the opportunity at this point to remove duplicate processes and refresh outdated ones, especially as they relate to your estimating team, is also worthwhile.

Review your IT infrastructure

When evaluating options and choosing the right solution for your company, you would have considered the goals you're looking achieve, and the unique needs of your team. Having made the decision to move to estimating software, now is when you need to review your infrastructure, and the way you're going to practically roll-out the software.

Consider the structure, workflows, and processes of your team. If you haven't already, you will need to choose the type of configuration you will require, based on the way your team works. Will you only need the software to be available independently on your team's computers, or do you require all your staff to be connected to a common data source? There are quite a few options available, so you should speak with your vendor about the best option for your company.

Once you have determined the way the software will work for your company, you will need to ensure you have the hardware you need. New servers, higher specification computers, and multiple monitors should all be considered, depending on how your team will be using the software.

Review your challenges

Implementing any change into your workplace has its challenges, and estimating software is no different. List the challenges you anticipate you will have during the installation, deployment, and adoption phases of your implementation.

These can range from staff resistance to change, the time it will take for staff to learn new processes, company deadlines, and demanding projects, to external factors such as holiday periods, political events like elections, and other things beyond your control.

> Anticipating potential challenges will help you to determine strategies to work around or overcome them, and to remove those barriers that will prevent you from successfully implementing the software.

You can also ask for assistance from the vendors you are evaluating, or your chosen supplier. They deal with businesses like yours every day, so they are adept at understanding the challenges you face as part of the process.

Create a timeline

In order to make the implementation of your new software as smooth as possible, you will need to map out how the project should proceed. A timeline will be a critical part of your plan, detailing specific actions, milestones, and the expectations around when they should be reached.

> Having a clear timeline will help keep your project team on track, help staff understand what's expected of them, and give management visibility over your progress.

When planning out your implementation timeline, there are a few things you should consider:

Scheduling of implementation

Think about when the best time is to introduce the software to your team. Timing is key when introducing change. You can mitigate the risks of lowering productivity by taking a look at what else is happening around your company, and choosing a time that does not conflict with other events that are taking place.

Are there specific times of the year that work is slower? Do you have integral staff taking leave? Will the necessary infrastructure be available at this time? Are there external events happening that can impact your staff having time to learn the new software? These are all questions that should be considered.

Duration of implementation

Like any change, introducing software like Cubit Estimating will take time until your team are proficient and using it to the fullest potential.

Estimate the time it will take for your staff to be working effectively with the software, taking into consideration their need for training, existing project priorities, and daily tasks. In order for the transition to your new software to be a success, staff should be given adequate time to learn and feel comfortable using the system.

> Your implementation schedule should realistically reflect the needs of your team, and be balanced by your company's expectations and requirements.

Not allowing a realistic timeframe can result in your implementation being blown out, abandoned, and the project ultimately being unsuccessful.

Adoption milestones

To keep your project team and staff on track with their adoption of the software, consider introducing milestones for them to reach. This will give them direction in their learning, ensure everyone is aware of the expectations placed upon them, and help to maintain momentum in adoption of the software. For example, some simple milestones may be that the new software is installed and accessible, that staff have attended a training session, and that new jobs or projects have been created within the new system.

Contingency allowances

Expect the unexpected. While that sounds impossible, it is possible to anticipate that unexpected roadblocks may arise that will impact the deployment or adoption of the software. Add a buffer to allow for anything that interrupts your schedule.

Create a communication strategy

Your success in implementing estimating software into your company will largely depend on your communication. It is one of the most critical components of any project. You will need to define a communication strategy for your company, detailing what information you will be distributing to your team, how it will be offered, and when it will be given.

Communication around the implementation of new estimating software should start early. Discuss the reasons why the change is needed, and what your team can expect to gain from the process. It will be hard to encourage your team to use the new system if they do not understand why it is being introduced. You should also discuss why your chosen software was selected as the solution to your team's challenges, and how it will help them to perform their work and achieve their goals.

Clearly define the expectations placed on staff, as well as predicted deadlines, to ensure everyone understands what is needed of them. Your communication to your team should start early and happen often. This is an exciting time for the company, and your staff will want to feel part of the change.

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Deployment

After you've developed your plan, created your timeline, and commenced your communication strategy, you will need to determine your deployment approach. We've outlined some of the steps you should consider in the deployment phase.

Installation

Working with your IT department will be essential in the deployment phase of your implementation; which is why having an IT representative on your project team from day one is recommended.

Your IT department will need to work closely with your chosen provider, in order to determine how the software will be installed and configured for your company's infrastructure. You will need to review how your team works and determine whether you will require a network style setup for your work, or whether individual installation is the best way forward.

> It is wise to have partnered with a provider that can offer you help and support during the installation process, to ensure you are set up and operating as efficiently as possible.

This will also help in the case you don't have your own IT department or outsourced assistance.

Data Migration

You may have existing data, like supplier price lists, that needs to be migrated from your old way of working into your new software. You will need to allow time for this process to happen, in order to maximize the uptake of the software, and your team's efficiency using it.

Data migration can happen a number of ways. You have the option of importing your data yourself, however it is important to note that migrating your data may not be straight forward. Your chosen provider may offer migration assistance services to help you with an easy transition. Whatever method you choose, you will need an understanding of the tasks and goals you are wanting to accomplish, and be aware that your new estimating software may have you achieving them in a slightly different way.

Once your data is available in your new software, you may start to set up your templates ready to roll out to your staff with their installation. Your provider may offer you some default estimating templates, or you can have your software champions work to develop some templates that will help everyone transition more seamlessly to using the software.

Testing, Troubleshooting, and Training

Before rolling out the software to your team, you should first have your software champions and power-users start using the software, in a testing and troubleshooting period. This will allow you to start using the software in your native environment and with your own processes.

> By starting your deployment approach in this way, you'll be able to address any issues that arise before they cause any problems throughout your larger team.

Your software champions should also commence training in the new software before extensive rollout occurs. This will put them in the best position to be able to encourage widespread use of the software among your estimating team, and help other users adopt it more readily into their workflow. The importance of training cannot be overstated. We've detailed more on training in the next section.

Rollout

Rollout of the software is the tangible face of change for your team. This is where they come face-to-face with the reality of change, and they have the opportunity to dive into a new system.

It is up to you how you roll out the software to your team. Keep in mind that your team will have questions and need help and support during this period, so keep the communication channels open.

Collate your frequently asked questions and keep them accessible in a central location so others in the team can review or contribute openly. It will also help onboard any new team members you bring on in the future.

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Adoption

Navigating workplace culture to encourage adoption and positive engagement can be one of the most challenging phases of introducing new software to a business.

There are many strategies you can employ in order to foster adoption of your new software. In the first phase of this guide, we discussed involving your team - the end-users of the new software in the decision making process from the start, and to keep communication with them open throughout the implementation process. This is one of the most important ways you can help address any resistance to change, and make the whole process run more smoothly.

We've developed some further suggestions for you on how you can spur early adoption and engagement with your new software.

Utilise your software champions to encourage company buy-in

Your champions have the power to greatly influence how the new software is perceived and used by your team, which is why it is essential to have them defined and included in the process early. It is also important to include your organizational and social leaders - those people who have influence, to be actively supporting use of the software.

> Stress to your influencers the importance of positive uptake of the software, and encourage them to share their experiences and successes.

Consider a staged transition period

When a new technology or process is introduced into any company, time is needed to understand and learn it. Often the problem is that there is not enough time given to transition to new software, and as a result, a lack of confidence or understanding can result in costly mistakes and a severe impact on a company's productivity, reputation, and bottom line. This is one of the reasons that introducing new software solutions can be seen as being too daunting and difficult, and is steered away from by many companies.

A staged transition period is a way you can overcome these issues. Instead of forcing a sudden change on your team, introduce it to be used in tandem with your current method of working. This will give them time to continue to work effectively within their known processes, and start trying the new software without fear of creating errors and costly mistakes for your company or your clients.

This approach will also mitigate the risk of lessening productivity within your team, as a direct result of being forced too quickly onto a new system. It also reduces your need for a roll-back strategy, as it offers your team sufficient time to be able to learn the new software and work through any concerns as they arise.

In order for this approach to work, you will need to keep your staff accountable and have realistic goals and milestones for them to reach, to ensure they are using the new software.

Training is your key to success

The importance of training in the overall success of your software implementation strategy cannot be overstated. Adopting new technologies is hard for many people. Often companies will introduce new systems and processes but not offer enough training for their staff to be comfortable and confident using them, which can result in errors, loss of productivity, low job satisfaction, and loss of profitability.

> As a specialized solution, estimating software requires time to learn it, before it can be used to its best advantage.

In order to have your staff work successfully, you'll need to train them on how to use it. No matter how fantastic your new software is, no one on your team will be able to use it, if they don't learn how to.

Depending on the software you've chosen, some tools may be quite intuitive, but in order to get the most out of it, you should do some formal training to understand how to use it efficiently.

Because everyone learns and retains information differently, it's important to consider a range of training techniques to help your team. Your chosen provider should offer training in a variety of modes. Formal courses, user guides, webinars, and how-to videos will all help you to ensure your team are getting the information they need in order to be successful.

You should also consider custom training options, or onsite offerings that are tailored to the unique tasks, goals, and workflows of your company. Some software providers offer tailored on-site training options, so your team can understand your new software in the context of their own workflows.

Focusing your training in this way will maximise the effectiveness of your time with your trainers, and give your team the leg-up they need to work as efficiently as possible. It will also accelerate the learning of your team, so you are better equipped to meet the milestones of your timeline. There is a high chance that choosing not to train your staff will put these milestones at risk.

Internal training may also be necessary, especially if your workflows and processes have changed as a result of introducing the new software. Be clear on what the new processes are and what the expected output is, so everyone is on the same page and working towards a common goal.

Ongoing support and communication

In order to encourage your team to keep using the software, they will need to know they can reach out for help and support when it's needed. Support should be available from your project team and software champions, as well as from your software supplier.

> Be sure to keep an open dialogue with your estimating team. Regularly discuss the milestones and goals you have set for them, and reiterate the channels they can use for help while using the software.

You will also need to ensure that your software champions are available and have the capacity to help people. It's no use directing people to one of your power-users for help if they are on leave, or working on a high priority project that limits their availability.

It's also important to celebrate the successes of your team in using the software. Commend their efforts when reaching milestones, and celebrate the achievement of common goals. Encouragement and acknowledgement will help your team gain confidence and increase their takeup of the system.

Other strategies to consider

Incentives and gamification are another way you can encourage adoption of your new software. By offering rewards when your team meet specific milestones, they are more likely to work more efficiently to achieve their goals.

You can also consider creating urgency around the adoption of the software, by placing timeline targets on your team's progress. However, you should always be reasonable when planning timeframes, and take into consideration the current workload placed on them, and their practical ability to reach milestones.

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Continuous Improvement

Once your team is set up and using your new software, it's easy to sit back and enjoy the results of everyone's efforts. However, your work doesn't stop there.

It's important to take time to analyze or measure the level of success you're experiencing as a result of introducing the software. Management will be keen to have information reported back, so that they can see the result of their investment.

Evaluation of the effects on your team will let you know whether the process was time and money well spent, and whether or not further change is needed.

You should also consider a company philosophy of continuous improvement. Take time to review how things are going, and where further efficiencies and enhancements to your processes and methods can be implemented.

Finally, you should maintain your relationship with your software supplier. Regularly provide feedback on how the software works for your team and your company, and don't be shy in offering suggestions on what's missing, or how it could better help your team.

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Quick Tips

Make a plan.

Communicate early and often.

Training is key.

Have accessible support.

Celebrate the successes and acknowledge the effort.

Keep communicating with your software supplier.