SKYSITE®

Getting Started in Construction Management Software

After being slower than most industries to adopt technology, the use of tech in construction has seen a boon in the last 18 months. From construction software to BIM to robotics and drones, the ROI has been proven including benefits in project delivery times, productivity, safety, and reduced re-work.

One sector of construction technology widely being implemented is construction project and document management software. These tools allow you to not only store drawings, but manage them and always keep your teams up to date with real-time sync. As companies of all sizes begin to investigate and use technology in the field, the question becomes not will the firm move on from paper, but when.

Still, choosing a platform can be daunting. A quick search of "construction document management" yields countless results of vendors, review sites, and definitions; it's an overload of information.

To help you get started, we've compiled the top tips on how to choose and implement a construction software platform, as well as a checklist to help you determine and rank your needs. This will help you prioritize factors such as the right tools for your firm, customer support, mobility, pricing, security and more. Armed with the knowledge of what you truly need, you are better prepared to find the right software partner, and not be tempted by bells and whistles that go unused.

Tips to Choose

Don't get overwhelmed by the numerous construction document management options that are available. By following these 11 tips, you'll be able to narrow down the field, prioritize and find the platform that is best for you.

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1. Always check references. Discussing with other users how they are utilizing available tools and what they like or don't like will provide critical insight to selecting a software.

2. Include the various users in your staff in the evaluation to ensure you find a tool that meets their requirements, gains their buy-in, and is a solution they will use every day.

3. Test and interview. Always sign-up for a free trial and make sure to use it on your laptop and mobile. Ease of use is the most critical factor that contributes to adoption rates.

4. During the testing phase, establish a business objective and baseline for assessing ROI.

5. Think about what your immediate needs are, but also how you'd scale the technology in the future. You don't need to buy all the features upfront. Start with what you need and know what you can live without. Don't be tempted by a fancy, pricey package, as many of those features end up going unused. This will help you narrow down which vendors might be the right fit for you

6. Have a strategy ready to go. Companies who adopt construction tech with no formal workflows and processes in place see more difficulties during implementation and see slow gains. Companies who have formal workflows and processes in place will see quicker adaption and ROI.

7. Don't choose something because "everyone has it," or "it's cool." Identify your challenges and then research what tech solution will solve those challenges.

8. Don't buy a generic solution. Make sure you choose an app that is specifically for your industry and understands your needs and challenges.

9. Find out what training and customer support is available. Choose a provider who offers customer support when and where you need it.

10. Don't choose a solution that will dictate your processes for you, pick a versatile solution. Find one that goes from one project to the next without hassle so you can focus on more important project tasks.

11. Consider using a consultant versed in the industry and construction technology options available to help select a platform.

Tips to Implement

Being prepared, having a plan, and exercising patience are the keys to a smooth roll out of new software. Employing the tips below, including tips from current construction software users, will also lead to a faster and easier adoption.

1. Have your project managers pilot it first. This will allow them to become familiar with the software and be able to answer questions post training.

2. Be transparent and address workers' concerns early in the process. Inform them how the technology will impact workflows and may change their daily routine. Let them know the timing and length of their training.

3. Provide training before your team is required to use it in the field. Be understanding, different team members will pick up the technology faster than others.

4. Scale as you learn. Implement features and tools in increments. This will help your staff from being overwhelmed at trying to learn too much at once.

5. Evaluate and adjust. Once your program is up and running, routinely check in on your teams to evaluate and distinguish what is working and what is not, as well as any tools that aren't being used and why. Plan a course of action such as additional training, workflow revisions, etc.

6. Develop and provide easy to read tips that your team can reference for common tasks or commonly used features.

7. Encourage use of the provider's customer support tools. Most software companies have numerous ways to find answers, be it chat, phone, email or resource libraries.

Prioritizing what you need

Armed with what you need to know when researching construction management software, you can now use the checklist below to evaluate and analyze your priorities and needs. At the end, you can plot your top needs and features to determine the construction software direction best for your company.

Features and Tools	Need (Y/N)	Priority 1-5
Designed specifically for the AEC industry		
Easy use on a mobile device		
iOS application		
Android application		
Real-time sync		
Online and offline access		
Document management		
Full content search		
Construction admin tools		
Markup tools		
Local desktop sync		
Photo management		
Auto-hyperlink		
Email archive		
Order prints directly from app		
Customized branding		
Company		
I am looking for a stable company that has been in business for many years.		
I am looking for a company that is an expert in the AEC industry.		
I am looking for a company with physical locations and local support.		
I am looking for a company that offers other complimentary services for my business.		
The platform I choose must provide customer references.		
Reliability		
It is important to me that the platform I select has 99.9% uptime.		
I want a platform that conducts regular releases and/or upgrades.		
I want a platform that is proactive during unplanned downtimes.		

Customer Success	Need (Y/N)	Priority 1-5
The depth and experience of the customer success organization is important to me.		
I want a platform that offers a dedicated customer success manager.		
I'd like to contact support directly from the app.		
I'm looking for a platform that offers a training program to new customers.		
I'd like access to online help and tutorials through a dedicated knowledge base.		
I'd like access to phone support.		
I'm looking for a platform that provides prompt communication on product updates.		
Pricing		
I am very price sensitive.		
I'd like a free trial.		
I only want to pay for features I will use.		
I don't want to be charged for storage.		
Security		
Having my data secure in the platform is important to me		
I want my platform to have Single Sign-on (SSO)		
I want my platform to be ISO Certified		
I want my platform to include 2-Step Verification		

Construction Document Management Priority Summary: Use this chart to determine the best construction software direction for your company.			
Category	**Top Needs**	**Top Priority**	**Notes**
Company			
Reliability			
Customer Support			
Pricing			
Security			