# 5 Steps to Standardizing Your Project on PlanGrid
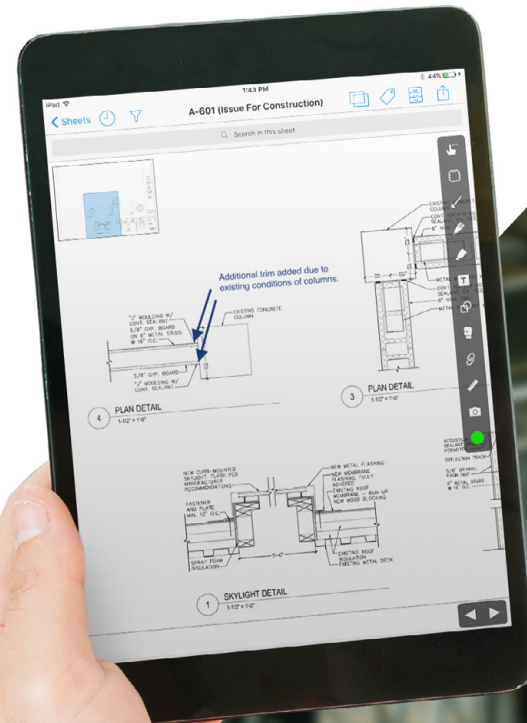
PlanGrid's Guide to Better Collaboration Through Standardization

# What's Inside?

# Introduction

There's a smart Project Executive I know—I'll call him "Sam." Sam's one of the best in the business. He leads multiple high-profile construction projects, finds plenty of time for his family and still gets through a couple novels a month. He has had a successful career and maintains a work/life balance many of us struggle to achieve. Many have asked him how he keeps everything straight with so many responsibilities.

## His answer always boils down to one simple concept: **Standardization**.

Achieving a higher level of success on your project is attainable when you begin applying best practices to your work. If you're reading this you've likely already pulled the trigger on PlanGrid, so let's walk through how to roll it out!

To start this discussion, it's important to be clear on what standardization means. Construction Business Owner defines standardization to mean that "information is stored and generated from a reliable, single format, making both the sharing and reporting of data more timely and effective."[1] Standardizing makes work more predictable and enables your team to get it done efficiently.

When a process has clear definition and a consistent sequence of work, your team wastes less time debating how to solve a problem. With standardization, a problem is defined as anything outside of the specified standard.[2] When work processes are not documented, it causes confusion within a team—especially when problems arise.[2]

**Standardizing PlanGrid across your project will:**

- Improve communication

- Boost productivity

- Reduce training time and costs

- Lower support and maintenance costs

- Gain and retain data and insight for future projects

On the following pages we'll walk through five steps that will get your project team up and running with PlanGrid.

# 1) Find your PlanGrid champions and obtain buy-in

The first step is finding your champions. These are going to be your internal and external PlanGrid advocates. Champions are critical in getting the buy-in necessary from all stakeholders. Internally, you will need champions at the leadership and project levels. Externally, you should find a champion at each organization involved in the project. This could include subcontractors, owners, architects or joint venture partners. Champions need to understand the ROI of PlanGrid in order to share it with their teams and achieve buy-in.

**Project Team Level**

At the project level you will need two champions to make the best possible case, a Project Manager and a field team member. They have the most direct influence on everyone that will use PlanGrid on a daily basis. Your project team champions are the day to day advocates for PlanGrid. They will become power users that others look to for expert guidance.

**Leadership Level**

Nothing hurts the implementation of software more than an unenthusiastic leadership team. Getting their buy-in is critical. Leveraging the project-level champions as PlanGrid advocates is the best path to get your leadership team on board. Demonstrations of the tool and an opportunity for questions may help bolster their support. When the project team sees leadership embracing PlanGrid, it will become a factor in their acceptance of the tool.

**External Stakeholder Level**

You will need buy-in from your subcontractors, architect(s) and the owner of the project. An owner or GC can decide that everyone on the project must use PlanGrid. If that decision isn't communicated well (and paired with training) it will negatively impact adoption.

It's also important to decide who will be paying for the tool. Is it a project or corporate level expense? Will the GC buy extra licenses to assign to key members of subcontractor groups? Will the GC require each group to buy their own licenses? Will the cost be billed to the owner?

# 2) Build your roadmap

To build a proper roadmap and get true cross-team leverage, your processes should be collaboratively defined at the beginning of the project. This is the "who does what and when" part of your implementation. It's crucial to define all your processes, especially those that impact multiple stakeholders.

It's a safe bet that any changes made to a team member's normal working pattern will be met with resistance.[1] Reduce or eliminate resistance with a thoughtful approach to change management. Start by ensuring everyone feels they are able to vocalize their needs. Include representation from all roles on a steering committee or hold role-specific workshops where you demonstrate how PlanGrid will work for them. At the end of these discussions, the best processes will arise as created by the people actually doing the work.[3]

Roll the best workflows discussed into the PlanGrid roadmap. Set expectations around the implementation timeline, outline workflow improvements that PlanGrid will handle and provide an opportunity to align hardware and software requirements across the project.

Here are a few decisions to consider when standardizing your PlanGrid rollout:

**Hardware rollout:** What platform (iOS, Android, Windows) will you deploy and who will manage the devices? Will your IT team implement Mobile Device Management (MDM) software to ensure security?

**Document control:** Is there a single dedicated owner for document control or will different project members be in charge of distinct parts? Which documents will be stored in PlanGrid and what will your folder structure look like? How will you track versions and who will be responsible for keeping the project up-to-date? How will you incorporate subcontractors and other team members?

**Team permissions:** Team permissions may change, but it's best to set up guidelines for usage early. Who will be your administrators? Who can publish their markups to the entire project team (who on your project team, subcontractors, etc.)? Who can upload or delete sheets and documents?

Keep in mind that team members are more likely to embrace the decision to implement PlanGrid when they feel they were part of the decision making process—even if they were initially hesitant for the rollout.[3]

**Workspaces:** Workspaces allows users to have a separate place to access information that's most relevant to them, share sensitive information with only the right people and keep detailed records of work history. Will you use Workspaces to split up your project based on phase, area or trade?

**Issue tracking (Punchlists):** Who owns the punchlist? Will an architect create the first round and assign it to the GC? Who may close a punchlist item and what is the criteria for doing so? Will punchlists be tracked in workspaces or in the main parent project?

**Issue tracking (QA/QC):** Will subcontractors be able to track quality items in the GC-owned project? Will they maintain a separate project for internal teams? Will you use workspaces to track QA/QC?

**Submittals/specifications:** Will you use PlanGrid Submittals? If so, who are the user groups and what will that process look like? Will your team use the Automatic Submittals Log to assist in standardizing the submittals process?

**Shop drawings:** Will you upload shop drawings once approved by the Architect-Engineer? Will you use project tags and upload shop drawings in separate projects, in workspaces or as documents?

**Markup standardization:** Will you provide guidelines for markup colors and shapes? If using markup layers, will you standardize the names and types of layers? Which markups should be published to a project and which should remain private? Will you set a clear workflow for documenting as-built markups as you go?

**RFIs:** Will all RFI stakeholders log into PlanGrid to complete an RFI workflow, or will you use a different method?

**Project turnover:** How will you leverage PlanGrid during project turnover? What documentation will you provide to the owner? Will the owner have PlanGrid, or will you need to export the documentation from the platform?

**PlanGrid Tip**

A strategy that we encourage project teams to consider is a small pilot group to test out the new strategies prior to rolling out to the project at large. This lets you work out kinks in a controlled fashion. A pilot will often include the General Contractor and one or two trusted key subcontractors.

# 3) Address the needs of your project team members

It's important to determine exactly who will be using PlanGrid, so you can best address their needs during the rollout. Users can include project team members, your leadership team, subcontractors, owners, architects and anyone else working on the project.

**Pick the Proper Communication Format**

Adoption determines the success or failure of a software implementation, so be deliberate in how you manage the rollout. Announce the new software in creative ways by bringing the team together with an extra incentives. We suggest a lunch event, paired with a raffle to increase attendance. This event is a chance to show how PlanGrid is going to help the company be successful and make workers lives easier. People care about the success of the company they work for, but they care more about how it impacts their own lives.

Remember—if the rollout isn't communicated well by an enthusiastic leadership team—your new users won't get excited about it.

When you share the benefits of PlanGrid and the reasons for adoption, do so in terms that all team members will understand. Subcontractors will be interested in instant access to approved drawings, visibility into other trades and connecting their field teams to the office. Architects will get excited about sheet revisions automatically being leafed into place. Owners will respond positively to robust turnover packages and detailed electronic as-builts. When people feel informed, they are less resistant to change and may even become a PlanGrid advocate on your future projects.

**PlanGrid Tip**

To get an internal support system started, pick a few excited users who are proficient with construction technology. Establish these key team members as the go-to resource for the rest of the team. This is a great opportunity to let younger employees trade technology expertise with those that are more experienced in the field.

# 4) Implement the proper training to ensure project adoption

Once your roadmap has been completed, it is critical that user training be consistent across the entire project. If it isn't consistent, your users will use the product in different ways.[3] Be sure to include external teams (subcontractors, etc.) in the training. When different groups are left to figure out the tool by themselves, it will cause confusion when they begin completing project tasks in different ways. Finally, hold everyone accountable for their assigned training tasks and completion dates.

We suggest leveraging the training PlanGrid can provide to ensure the success of your rollout. Our most successful customers have PlanGrid Consulting Services come onsite to provide training. Construction professionals often prefer learning in a hands-on environment—that's why many of us are in the industry in the first place. Engaging our Consulting Services group is a great way to provide that environment for your team to learn in. If your organization has an internal training division, we can certify them as official PlanGrid trainers. This will enable you to deliver your own training in-house. To contact our Consulting services group, head over to our website [here](#).

"

"The best part was having a PlanGrid consultant help us step back and coordinate with our superintendents on how to streamline information flow. They really wanted to help us succeed which felt great."

**— John Ramos, Project Manager, rand\* construction**

# 5) Integrate your systems

PlanGrid can easily integrate with many of the software tools you are currently using. Our open API gives you control to create integrations between PlanGrid and almost any software you currently use. Our technical consultants can guide your developers or create these integrations for you.

When evaluating integrations, consider what data will be stored within PlanGrid. We try to stand by the mantra that "if it isn't in PlanGrid, it doesn't exist." If that's not feasible based upon your workflow, document what will be stored elsewhere and define how the other tools will coexist in your processes.

Examples of the types of tools that can be integrated include:

**Project Management Tools**
Keep drawings, teams, issues, RFIs and documents completely in sync between PlanGrid and your project management software.

**Cloud Storage**
Import drawings from and export snapshots and as-builts to cloud storage such as Box and Egnyte.

**Photo & Video**
Import imagery from drones and webcams to document progress on jobsites.

**Business Intelligence, Inspection and Safety**
Analyze issues, RFIs, logs and drawings to uncover trends, performance and insights.

**Bonus Tips!**

- Many customers create a central dashboard or bulletin board with mission-critical information as the first "sheet" in their projects. To ensure this digital bulletin board is leveraged, the jobsite crew is trained to start their day with a fully synced tablet. Here, you can hyperlink company documents, permits, safety manuals and more in a centralized location.

- Ensure all necessary hardware is defined and available in advance of the implementation. Pairing this with the comprehensive training program outlined in Step 4 sets new users up for success.

- Have a clean turnover package full of data created by the General Contractor and subcontractors. This package will be provided to the building owner as an as-built export. The owner will be excited to have such a wealth of information about their facility. Moreover, if the owner is included in the standardization of PlanGrid, they can use the tool throughout the lifecycle of the building.

# References

[1] https://www.constructionbusinessowner.com/technology/software/why-you-need-standardize-your-hardware-and-software

C. A. Martin, Why You Need to Standardize Your Hardware and Software, Construction Business Owner, November 2011


[2] http://www.industryweek.com/companies-amp-executives/beginning-step-toward-improvement-standardize

Jonathan Taurman, A Beginning Step Toward Improvement: Standardize, Industry Week, February 2009


[3] https://www.isixsigma.com/methodology/business-process-management-bpm/standardize-processes-make-change-stick/

Stephen Crowden, Standardize Processes to Make Them Stick, Six Sigma

# See a Live Demo
## or give us a call at +1 (415) 429-1227

PlanGrid's Construction Productivity Software is the easiest and most cost-effective way to get substantial return on your investment in construction mobile apps. By using PlanGrid you will:

- **Complete projects faster:** 90% of project costs occur in the field and not in the office. This includes wasted time and project delays. With PlanGrid, you can reduce wasteful trips to the trailer and time delays, while eliminating costly rework. PlanGrid also allows for faster collaboration and communication.

- **Reduce costs:** PlanGrid allows you to optimize productivity in the field, which eliminates time waste that causes project overruns. By completing projects early or on time with PlanGrid, contractors will benefit from reduced costs.

- **Win more bids:** The best way to bid more competitively is not just to track costs so you can provide more accurate estimates — it's to improve your overall productivity. PlanGrid's Construction Productivity Software will allow you to increase productivity so you can reduce costs and win more bids.

**Try PlanGrid for Free**

 App Store        Google Play        Windows

There is a reason why PlanGrid is not only the #1 construction app, but also the highest rated. With PlanGrid construction productivity software, you can streamline document management, access all project information from any device, and seamlessly collaborate within teams.

11
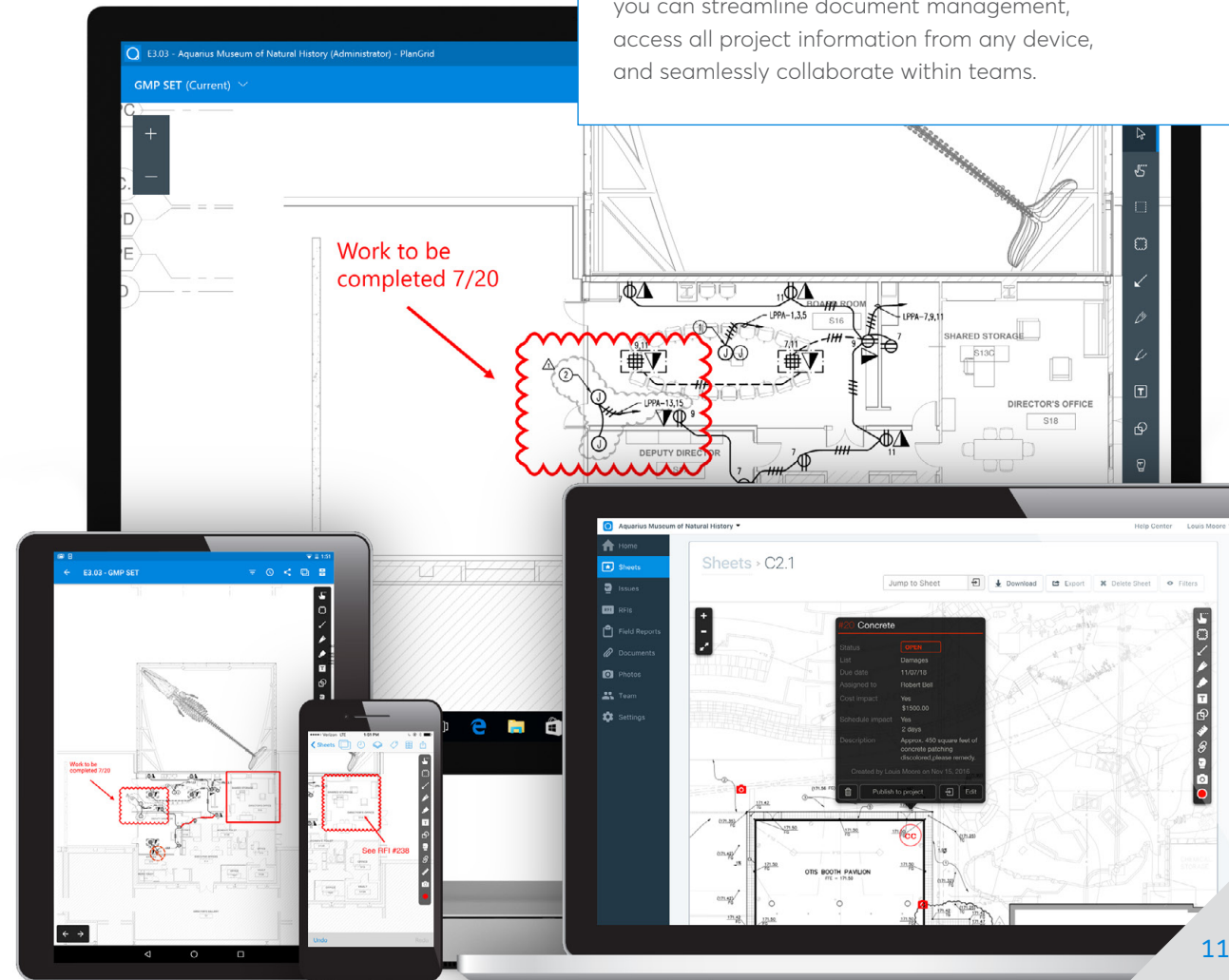
# PlanGrid

Used on more than 1,000,000 projects around the world, PlanGrid is the first construction productivity software that allows contractors and owners in commercial, heavy civil, and other industries to collaborate, collect, and share project information from any desktop or mobile device through the entire project lifecycle.

PlanGrid increases project efficiency by streamlining document management, providing construction teams with easy access to all project information from any device, and enabling seamless collaboration within teams.

Guide Author:
**Eric Thomas**
*Content Marketing Manager, PlanGrid*

──── **Connect with PlanGrid** ────

United States
+1 (415) 963-4088
**www.plangrid.com**

Australia
AUS 1800 316 406
**www.plangrid.com/au**

United Kingdom
+44 (0) 20 3695 0292
**www.plangrid.com/gb**

Canada
(800) 646-0796
**www.plangrid.com/ca-en**
**www.plangrid.com/ca-fr**