



7 Steps to Standardizing Your Enterprise on PlanGrid:

The Essential Guide to Streamlining Field Operations for Maximum Efficiency

Increase revenue, make better business decisions, and improve bargaining power with vendors.

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Introduction

When you have one way of doing things, everyone knows what to do and when to do it—in a construction zone, that simplicity can make everything move more efficiently and allow everyone to be more productive. Your construction business depends on processes that are repeatable and that outline the steps your team needs to take to be successful. If you can't create a set of procedures that can be repeated, with results that can be measured, you simply won't have a way to tell how well your team is performing—and each project will be making their own decisions, leading to poor data quality.

By ensuring you build in processes that can easily be repeated and standardizing construction software so everyone can use it, you make it easier for your team to succeed and create a workflow that ensures your projects proceed as they should and complete on time. PlanGrid is designed to help you craft clearly defined, standardized processes that can be successfully implemented and repeated as needed in the field. What makes standardization so crucial, and how can you make the most of the process? Our latest guide reveals our secrets to standardization and construction project success.



What Is Standardization and Why Is It Important?

Hint: You're Losing Revenue Without It

One weakness of traditional management processes is the lack of standardization; there is no one set, single standard to refer to. Project managers are often chosen based on their previous experience—and end up keeping the same practices they used with previous projects, whether these procedures are truly applicable or not. This typical practice can lead to large amounts of variation in a company—sometimes every department or team ends up doing their own thing and the entire organization suffers. The first step is to admit when a process is broken. Construction productivity hasn't substantially increased in 50 years, so we have to be open to making fundamental process changes.

Lack of standardization makes it more difficult for teams to communicate; often they're using different devices and

software and relying on paper notes and memory to make things happen. Every additional device or single piece of software makes the data your team is working with less reliable and useful. Pulling every bit of information under one umbrella streamlines and simplifies the process because it requires each member of your team to communicate using the same format, the same language and the same tools. Standardization is one of the reasons PlanGrid is such a time saver for our construction partners because it eliminates all the different (often ineffective) solutions put into place over time and without forethought.

The idea that standardization of equipment and software is beneficial to construction companies is nothing new; companies were working towards standardization decades ago. As long ago as 1987, guides were extolling the benefits of standardization, "A standardized approach to the preparation of construction documents, including specifications, can aid owners, architect

engineers, and contractors."¹ Fast forward thirty years and standardization is still a crucial factor for projects. Construction software apps like PlanGrid make standardization simple and ensure you don't run into the problems experienced by those organizations with too much software and too many policies and procedures.



Communication Problems Lead to Business Problems

When your team can't effectively communicate because of standardization issues, your entire organization suffers. It's a common scenario: construction companies are often pushed apart by the different stakeholders and the numerous phases of work that are ongoing. This disparity leads to problems with communication and information processing across the different factions. These problems begin to create friction and adversarial relationships, which only make communication and information processing more difficult.

The most common complaint according to "A Case Study for Improving Construction Project Management" is the difficulty in requesting information and relaying that information to the various team members, i.e., communication. This "requesting and relaying of information" is the biggest hurdle for a construction company—and a problem that can be addressed by having different teams and divisions use the same operating software.

By not standardizing your mobile construction software, you lose some of the return on your investment. Lack of standardization adds friction between groups and departments because every team is using different technology and may think their way is the "right way." This dynamic hampers communication between your teams.

A lack of standardization in an organization can also increase overhead costs. The additional employees, tools and hours needed to compensate for the poor communication rapidly inflate your costs and result in mounting frustration. Data integrity is also affected by the teams using different technology. It is hard to share documents and information across different operating systems, so some of that data may be lost or altered over time, resulting in projects with poor outcomes.



Benefits of Standardizing with PlanGrid

By standardizing your construction software with PlanGrid, your teams will be able to communicate more effectively and efficiently. Since everyone in effect begins speaking the same language, using the same forms and taking the same approach, your teams begin to work together and collaborate, instead of constantly competing to determine which way is the right way to get things done.

A 25% increase in productivity will increase your profit margins by 1%.

Standardized construction software like PlanGrid benefits your company in more ways than one, including:

- Reduce time and costs associated with training; since there is only one process in place, any manager or supervisor can help someone new learn. Standardization allows for "interchangeable personnel" too. Many large construction companies either experience personnel turnover on projects or have a rotation program where operations personnel are swapped out of projects frequently. Standardization allows for this flexibility and reduces the learning curve when new people are introduced to project teams
- Lower support and maintenance costs; multiple pieces of software that all do different things each require their own maintenance tasks—PlanGrid eliminates these costs entirely
- Easy, standardized budgeting and cost management provides more control of your budget, giving you better bargaining power with your vendors
- Boosted efficiency that leads to increased revenue
- Standardized processes make it easy to measure results, so you can have a better understanding of your company's performance and get the insight needed to make the best decisions for your company

Best of all, the efficiency brought about by standardizing your software can improve productivity. A 25% increase in productivity will increase your profit margins by 1%. Increased revenue and the deeper visibility that your company will experience with PlanGrid can allow the project managers and the business to attain better outcomes for their own divisions and for the organization as a whole.



7 Steps to Standardization with PlanGrid

PlanGrid is designed to make the process of standardization easy and pain-free. When you begin to work with PlanGrid, you'll consider the way your projects are set up, the people who work on them and the way you want information to flow through your business. Most important, you'll spotlight those trouble zones that are wasting time and costing money and end up with a fair and impartial way to measure results.

Consider the following steps when you implement a standardized approach to your construction and projects needs with PlanGrid:

Step 1: Consider Project Setup and Participants

PlanGrid can be adapted to project specifications and different participants. Will you use PlanGrid for all projects? The software is flexible and designed to support any project your team needs to tackle, so using PlanGrid for all your projects will help you enjoy the full benefit of standardization in a hurry.

By answering these key questions, you can plan how PlanGrid can best benefit your company:

Which projects will use PlanGrid? We recommend switching all applicable projects to the standardized software to take full advantage of all the features.

Who creates projects? Knowing which team members can create and manage projects allows you to fully train your management group.

What are the expectations for the teams collaborating? Clearly defined goals and expectations written right into the project and accessible for everyone ensure the job flows smoothly. By setting expectations on who will collaborate on PlanGrid, you can write this requirement into project specifications at the very beginning to ensure that all team members are on board without additional costs after construction begins.

Which roles in a team will collaborate? Defining which teams and individuals need to work together ensures everyone is onboard from the start.



Step 2: Establish Field Technology Goals and Uses

Establish from the beginning what your company is hoping to accomplish with the project. Perhaps the goal is to reduce costly rework by keeping a single current record set. Maybe your aim is to increase the communication between owner, architect, and contractor. The goal may be to reduce reproductions or printing costs by going paperless.

With PlanGrid, your company can select features to align with your goals to drive your desired results. For example, if you want to reduce costly rework by keeping a single current record set (goal) then you should standardize on the document control feature of PlanGrid (use).

Use these key questions to help identify your field tech goals:

- What are your project goals?
- How do you prioritize these goals?
- How will you use PlanGrid?
- Who will be responsible for PlanGrid during each project phase?

Step 3: Assign Responsibilities and Permissions

PlanGrid allows you to select responsible team members for each step of your project. Only the assigned people with the correct privileges can make changes, see a document, submit a report or manage budget details. The safeguards that prevent anyone from making changes can help protect your company while clearly establishing responsibility.

Answer these questions while you set up your PlanGrid accounts:

- Who is responsible for uploading and distributing project documentation?
- What permissions need to be established?
- What details need to be established for specific types of data?
- Who needs to access the documents and plans related to this project?
- Who is ultimately responsible for the success of the project and has the final say in conflict or when differences of opinion arise?



Step 4: Develop Workflows

Establish the workflows for the requisite reports and documents to make sure everything is completed on time and accurately. How will design changes make their way from the design and planning team, to the field team and to the persons ultimately responsible for completing the work? Knowing how you want information to flow through your system helps improve communication and ensures you are using PlanGrid to its fullest potential.

At this step, you'll consider which workflows need to be developed and decide how information should be shared and accessible to your team. Inviting people from all levels to contribute to the conversation is crucial. A process that makes sense to you while you are sitting at your desk may not work as you anticipate in the field. Input from the supervisors you depend on and trust in the field is very valuable at this stage.

Gathering team input helps in another way as well. When you roll out PlanGrid to replace the disparate mess of programs and solutions your team has been using, it will be easier to get everyone to buy-in if your people at every level have had a say in the processes you've chosen.

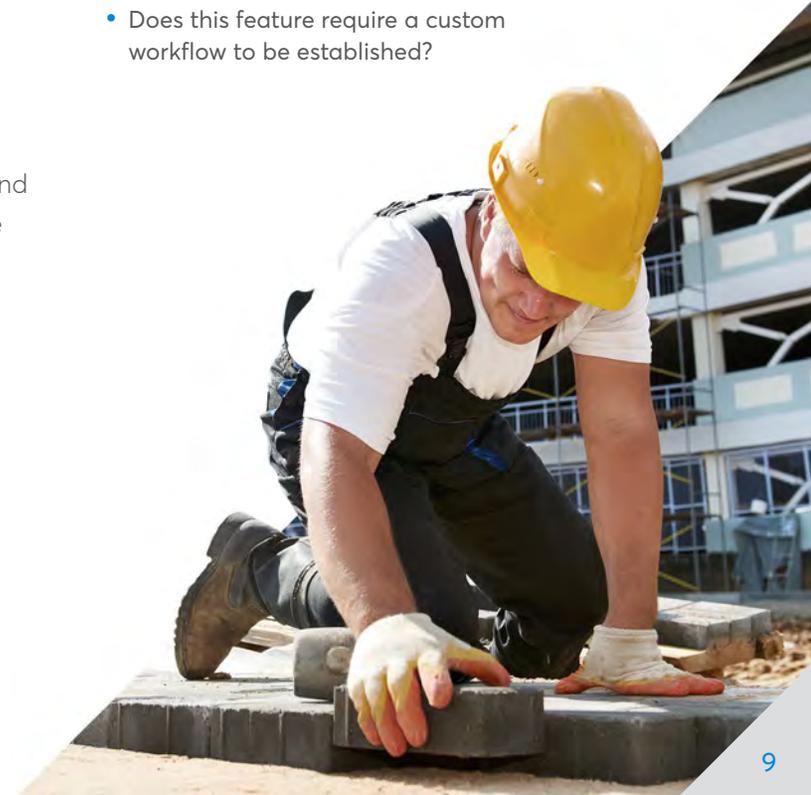
Step 5: Standardize Tools and Workflows

By standardizing the tools and workflows you use, different teams from within your organization will use PlanGrid the same way when it comes to submitting reports and managing documents. The field reports will be handled in the same way by every member of your organization, even by different members of different teams.

Even budgeting decisions can be routed and handled the same way by different people in different departments. Standardizing your forms, tools and even your workflow helps improve communication and reduce errors since everyone knows where to look for the details they need.

The tools you use for each part of your workflow can be customized; here are the key questions to ask when you are standardizing tools and workflows for your team:

- What standards need to be developed for each feature?
- Will this feature be used as a standard?
- Who is involved in each workflow and what are their responsibilities?
- Will we have a custom company standard for this feature?
- Does this feature require a custom workflow to be established?



Step 6: Align Hardware and Software Requirements

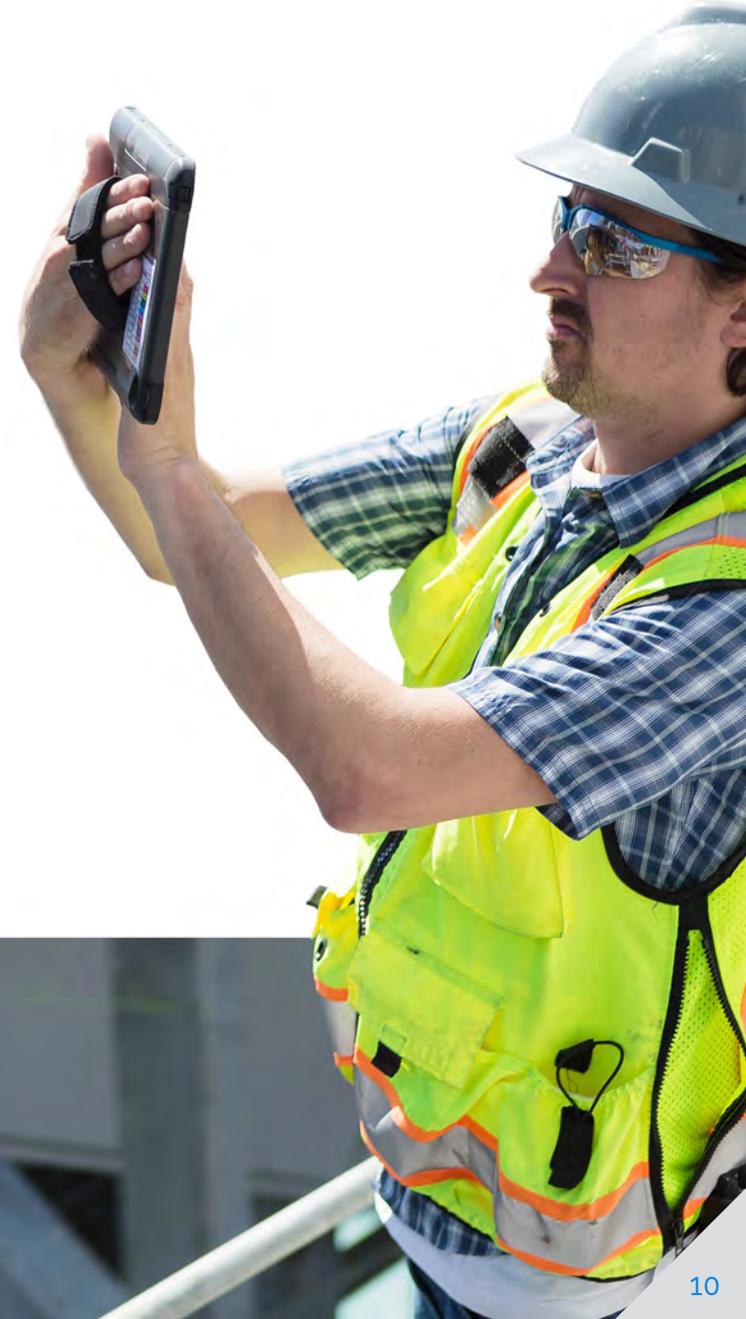
Making sure the hardware and the software are compatible and meet the needs of the company is an important step in standardization. Without this step, PlanGrid may not perform the same for every department or member of your team, so some people will miss out on all the benefits.

Standardizing your hardware ensures that your team members don't have to learn to use a new gadget every time they start a new project or take over an existing one. Anyone on any team can work with your hardware and software once you standardize, because they will naturally and intuitively know where everything is.

Here are the important questions to consider as you align the hardware and software requirements:

- What are your hardware standards?
- Will you allow BYOD (Bring Your Own Device)?
- Can you retain some pieces or does your existing lineup of hardware need to be replaced?
- Do you need detailed requirements for tablets and hardware?
- How can you ensure the software is utilized and updated?

One of the benefits of rolling out new hardware at the same time as your standardized construction software is that it streamlines training on hardware and software in one shot?



Step 7: Establish Project Deliverables and Metrics

How will you measure success? You won't be able to tell how well you're doing unless you have a way to compare your current effort to your previous ones. Accurate measurement also helps you determine how well different teams are handling projects and tasks; when you have standardized measurements to compare your team's results to, you'll know which groups need more help and training and which ones to deploy to work on your most important incoming projects. For example, if your goal was to reduce rework by 50% by keeping everyone on a single, current set, did you accomplish this?

Knowing how to measure the different internal aspects of each project can also help you identify trouble areas and help you continually improve your approach. By using PlanGrid to establish project deliverables and metrics, team members can see how the project is evolving and what needs improvement. When you know what is going on you can make adjustments that yield the results you want, often in real time.

With PlanGrid, incidents can be tracked and resolved in real time and projects can be evaluated. Not only will this give you a better idea of your overall performance, it will also help you better prepare for growth and future projects. The more you grow, the more complex your needs become, so standardizing and mastering specific, repeatable, scalable processes can help as you scale things up and take on more complex work and time-consuming tasks.

When you have 100, 200, 500, 1,000 users, scalability through repeatable processes is the ultimate goal with standardizing on any software.

Consider these important questions as you establish project deliverables and metrics:

- How will you deliver your project turnover package?
- What facility operations data will be uploaded as part of the closeout deliverable?
- Do you have standards developed for digital closeout manuals?
- How will your operations team involvement be coordinated?
- What metrics should you use to track your goals?

After each project, take the time to assess your performance using the reports provided by PlanGrid. You'll be able to spot areas that could be improved in future projects and provide your team with the feedback they need to succeed.



Standardization Starts with PlanGrid

PlanGrid can manage many different aspects of a construction project lifecycle and allows you to fully standardize your projects. By standardizing the entire company with PlanGrid, your organization will save time and money in the short run and enable scalability when the time is right. For most companies, standardization results in better revenue, increased ability to make business decisions, and better bargaining power with vendors. Clearly, when you're dealing with only a single vendor for a sizeable purchases, you have more influence. Because your business is more valuable to the vendor, they are more likely to provide discounts and other benefits to ensure the relationship lasts.

Could your company benefit from the increased efficiency and productivity that PlanGrid provides? Contact us to speak with a construction pro—not a sales person—and to learn just how much of a difference standardizing your construction software can make for your company. We're here to help you make the most of every project and to get the results and support you need to effectively grow your construction business.



See a Live Demo

or give us a call at +1 (415) 429-1227

PlanGrid 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:

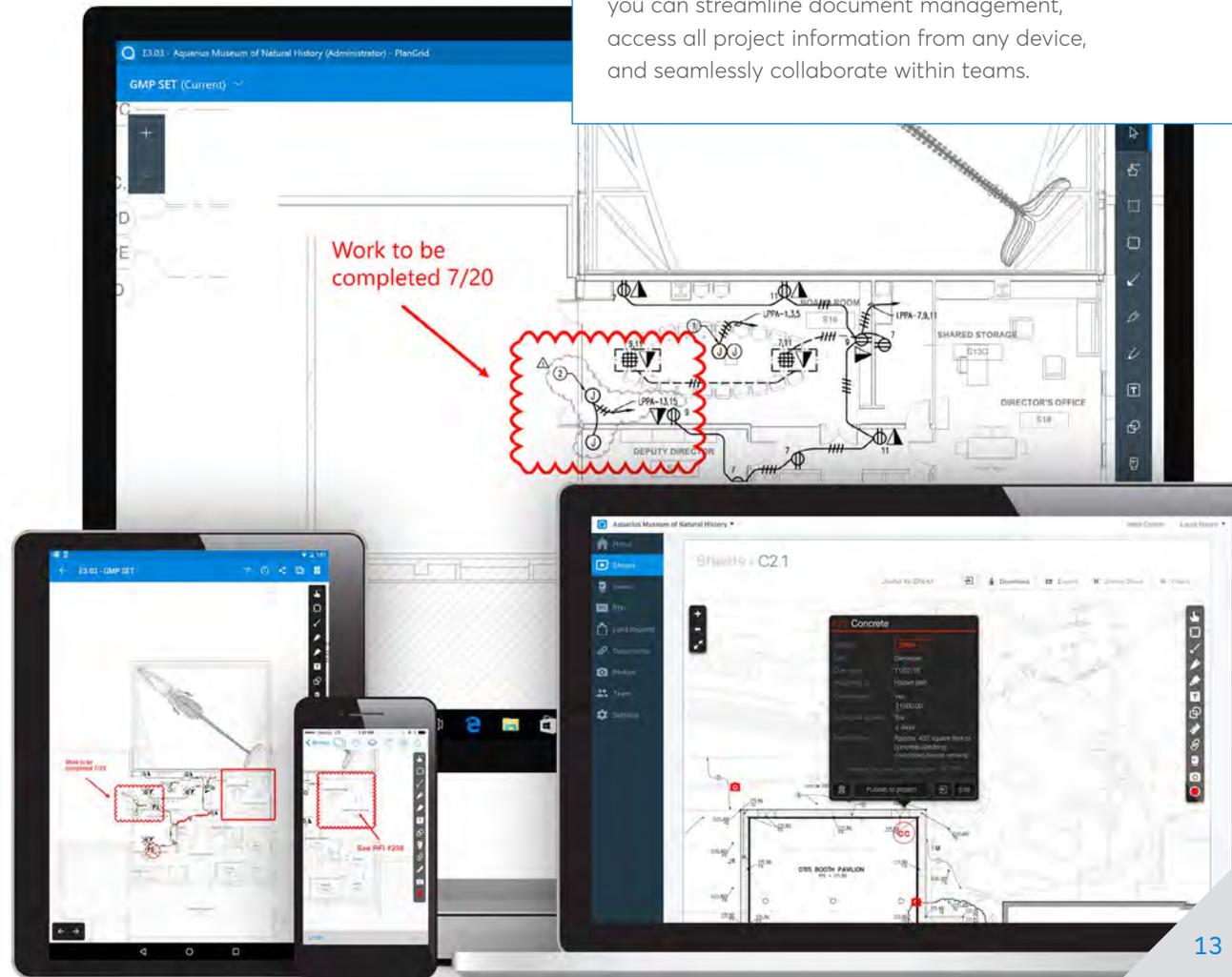
- **Complete projects faster:** 90% of project costs occur in the field not the office and most can be attributed to time waste or delays. With PlanGrid, you can reduce wasteful trips to the trailer and time delays while eliminating costly rework with faster collaboration and communication.
- **Reduce 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



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.





Used on more than 500,000 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.

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