

# GOING LIVE:

## COUNTING DOWN TO A SUCCESSFUL CONSTRUCTION SOFTWARE IMPLEMENTATION

By Maribel Scarnecchia

Fall is the time of the year when many contractors plan new construction software implementations. After the summer rush, construction work tends to slow down a bit. So it's natural for companies to focus on internal projects, such as accounting software upgrades, before the holidays arrive.

For some companies, the desire to take advantage of associated tax breaks will drive a year-end software purchase. For others, the need to start a new calendar year with better accounting, job costing, and project management tools will prompt a software search. But, no matter what the underlying reasons are for moving to new construction software, one thing is certain: a well-executed implementation is vital for achieving a swift return-on-investment (ROI).

Since there is no such thing as a one-size-fits-all solution for implementing new software, each vendor will approach this process differently. However, understanding how the proven implementation process outlined in this article works—and why—will help a construction company develop their own strategy for success.

### CREATING AN IMPLEMENTATION TIMELINE

The key to a successful construction software implementation is planning. After 10 years of experience guiding contractors through their implementations, I can conclude that most companies need about 8 weeks of planning and preparation time before going live on a new integrated construction software system. That being said, smaller companies may be able to shorten that duration to 6 weeks and very large companies may want to spend more time preparing for their conversion. But for the sake of creating a realistic, go-live timeline example, this article will assume that an 8-week implementation schedule is planned.

Once a contractor purchases an integrated software solution, the vendor will initiate contact and schedule a discovery session. This is an important question-and-answer time that will put both parties on the same page regarding expectations and objectives. At the end of the discovery session, a go-live date will be set, the contractor will be given supporting materials, such as

implementation checklists and guides, and the first task will be scheduled.

#### 8 Weeks Before Going Live

**Task:** setup of core databases

**Duration:** approximately 2 weeks

The first software implementation task is to set up the company and the core accounting databases in the new software. The databases include vendors in accounts payable, customers in accounts receivable, employees in payroll, and the chart of accounts in the general ledger. This is also the time to set up related information, like union codes and workers' compensation codes in payroll.

If a company is satisfied with their current database structures, this task will be fairly straight forward. Yet migrating to a new construction system provides the opportunity to review and improve current accounting setups. Switching from a short, numeric-only vendor code setup to a longer and more flexible alpha-numeric code structure is one example.

#### 6 Weeks Before Going Live

**Task:** setup of job cost

**Duration:** approximately 2 weeks

Job cost is the heart of a construction accounting system—and the most critical component of a contractor's software implementation. Construction companies shouldn't rush through this implementation task by simply duplicating their current job cost setup in the new system. New software means new job costing features and options that deserve consideration. After all, what's the point of implementing new software if it doesn't improve the company's ability to manage jobs?

After a general job cost discussion, it's important to discuss the specific flow of information between the office and the field to make sure that every need is addressed by the new software. Getting the owner, estimators, and field team involved at this point is a good idea, especially when discussing related topics and modules, such as job buy-out, change orders, purchasing, subcontracts, equipment management, and so forth.

#### 4 Weeks Before Going Live

**Task:** setup of additional modules

**Duration:** approximately 1 week

After setting up the core accounting modules and investing a



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considerable amount of time discussing the nuances of job cost, it's time for the contractor to set up additional modules that have been purchased, including those mentioned in the job cost discussion above. If a company has laid a solid foundation during the earlier setups, getting the additional modules in go-live shape should be relatively easy.

### 3 Weeks Before Going Live

**Task:** process training

**Duration:** approximately 2 weeks

Now that the company's various modules are set up, it's time for process training using the company's actual data in practice mode. Construction company employees that learn how to use software by performing tasks using their own company, jobs, and employees will not only retain more of what they learn, but will also be able to validate that the software setups support their workflow as intended.

Although many vendors still recommend onsite training during a software implementation, new computer-to-computer communication products, like Go-to-Meeting™, allow implementation specialists to perform top-notch training from a remote location. This eliminates the expense of onsite training, and allows the contractor's staff to learn how to use the new software in shorter, more effective blocks of time, which interferes less with their day-to-day work. If the contractor's budget allows for it, having a trainer come onsite during the go-live transition can be helpful.

### 1 Week Before Going Live

**Task:** testing and data migration

**Duration:** approximately 1 week

With process training complete, it's time to run test payrolls and discuss how go-live data migration will be handled. Critical go-live data are payroll year-to-date balances; outstanding accounts payable invoices and accounts receivable items; purchase orders; subcontract agreements; year-to-date job totals; and the trial balance.

With today's technology, exporting information from the contractor's existing software system into Microsoft Excel for clean-up, and then importing the data into the new software, is not a complex task for an experienced implementation specialist.

### GOING LIVE AND BEYOND

If all the tasks outlined above are completed, going live should be something of a non-event. By following the implementation specialist's instructions

and doing the "homework" necessary to prepare for each task, issues that could potentially delay the go-live date should be avoided.

Contrary to popular belief, going live with new construction software is not the end of the implementation process. Once a company is using their new software for daily construction management, many questions will arise. That's okay because

help is just a phone call away.

Even if everything is going well, it's a good idea to have the implementation specialist walk the accounting staff through the first payroll processing and the first month-end close-out. Finally, to optimize ROI, get a training tune-up 4 to 6 months after going live. And be sure to take advantage of vendor-hosted Webinars or other free online training. ■

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