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THE CONSTRUCTION ASSOCIATION

Quarterbacking the Evaluation, Selection, and Deployment of a Project Management Software

Georgia Loadholt

#AGCTECH24

MEET GEORGIA LOADHOLT

CLANCY & THEYS CONSTRUCTION COMPANY

- Operations Analyst based in Raleigh, North Carolina
  - 1.5 years with Clancy & Theys
  - 4 years in the industry
- Clemson University Alumna
  - Financial Management, BS
  - Construction Science and Management, MSCSM
- Passionate about solving today's construction industry challenges with tomorrow's technological advancements and business strategies.

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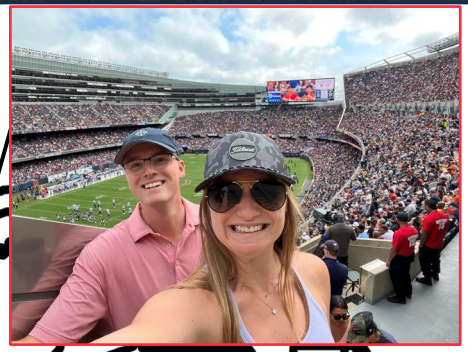

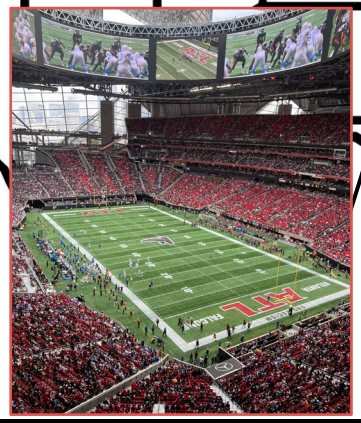

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CLANCY &THEYS
CONSTRUCTION COMPANY

6 LOCATIONS in the Southeast

- 75-year-old privately held firm
- Founded and headquartered in the Triangle
- 275+ employees in NC
- Over $500M in NC
- Nearly $400M in the Triangle

$1B Revenue $2B+ Bonding Capacity/$250M per project

PRESENTATION AGENDA

1. Film Study: Clancy & Theys IT Development
2. Business Problems We Are Solving For
3. Gameplan
   - *Phase 1: Study Enterprise*
   - *Phase 2: Framework*
   - *Phase 3: Data Collection*
   - *Phase 4: Evaluation & Validation*
4. Path Forward
5. Lessons Learned

Learning Objectives

APPLY

the presented plan to evaluate, select, & deploy the right project management software for your company

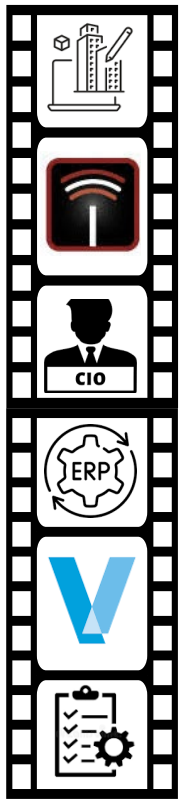
IDENTIFY

the key functions of project management software & determine which are the most important to your company

MANAGE

an evaluation, selection & deployment process, focusing on the resources needed to be successful

Film Study: Clancy & Theys IT Development



2007: Clancy & Theys' first ever Building Information Modeling department was founded.

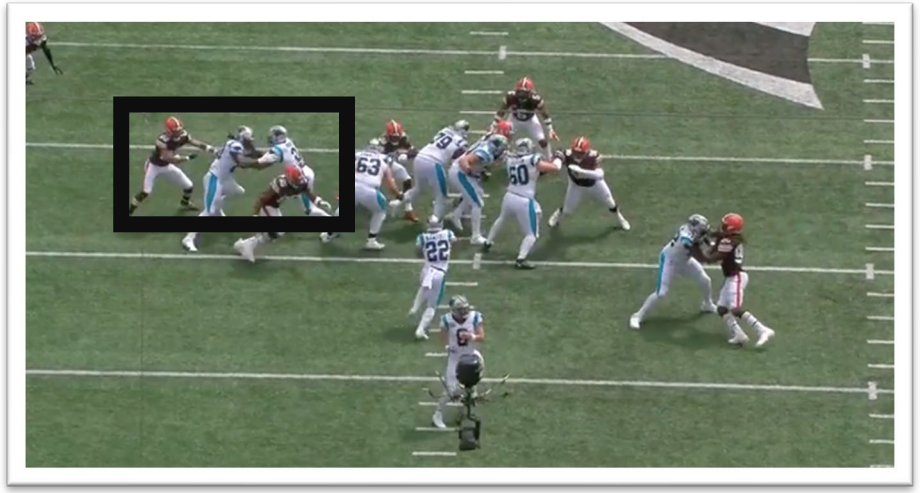
2011: Clancy & Theys' implemented Vela Systems. First time all five divisions were operating off one platform.

2013: The Scarlett Group was hired to review & advise on all Clancy & Theys' IT systems & processes.

2013: Search and evaluation of Enterprise Resource Planning (ERP) software.

2015: Implementation of Viewpoint to modernize the accounting system & provide a project management system.

2023: Search and evaluation of Project Management (PM) software.



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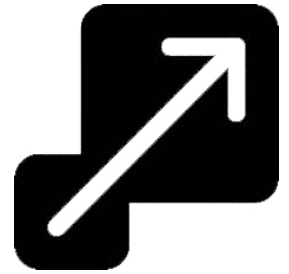
Business Problems We Are Solving For

Fragmented Processes

Inefficiencies

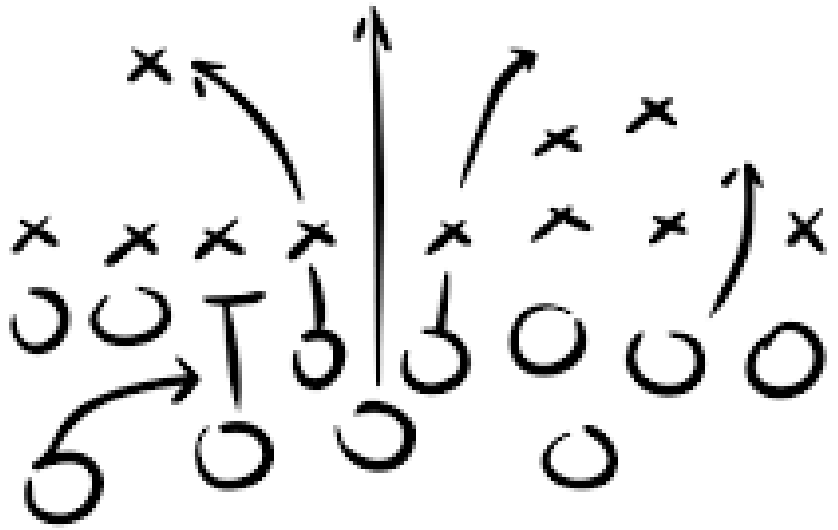
Technology Sprawl



Scalable

GAMEPLAN

- Study the Enterprise
- Framework
- Data Collection
- Evaluation and Validation



Phase 1: Study Enterprise

Survey Employees

- 311 surveys sent to field staff, project managers, project management assistants, virtual design and construction teams,
- **89%** response rate
- Survey questions covered:
  - Quantitative time engagement with software and processes
  - Challenges and successes with current software and processes
  - Daily challenges that project management software could address

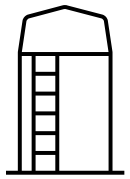
Survey Results

- **Importance Rating:**
  - **All workflows being in one software 8.85/10**
  - **All safety being in the PM software 8.22/10**
- **Key Challenges**:
  - Collect data in a meaningful way that can be leveraged across multiple platforms and pulled into dashboards used for business intelligence.
  - Internal and external collaboration

Survey Results

- Importance Rating:
  - All workflows being in one software 8.85/10
  - All safety being in the PM software 8.22/10

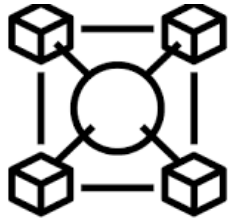
Key Challenges



Data Silos

Document Management

Training



Interoperability

Business Intelligence

Collaboration

Software Shortlist

- Survey identified 22 project management software options.
- Conducted preliminary research on each platform.
- Held initial meetings to refine the list down to three.
- Gate criteria:
  - General Contractor platform
    - Comparable company size to ours
  - Features above industry standards - robust
  - Scalability of the software

Team Structure and Approach

- 19 voting committee members
- 12 non-voting committee members
  - Leadership, Accounting, IT

- Expectations:
  - Attendance at monthly committee meetings
  - Attendance at in person software presentations and demonstrations
  - Prepare a recommendation for a project management software

Team Structure and Approach
IT's Value

Technical Expertise

Security Knowledge

Vendor Evaluation

Cost Efficiency

Recruit the Team

- Every department and role that interacts with the software is represented.
- Every Clancy & Theys division is represented
- Represents a variety of market sectors that Clancy & Theys does business in.
- Candidate is an industry expert and familiar with Clancy & Theys' processes.
- Employee of Clancy & Theys for at least six months, preferably a year.
- Candidates have the necessary time to commit to the project management software search.
- Screened candidates for previous software experience to build a collectively unbiased committee. Find balance in those members who lean towards specific software.
- Inclusions of some blended roles. Allow for a unique perspective across departments, sharing workflows and information.

Phase 2: Framework

Request for Proposal Development

- Analyzed survey data to identify 21 evaluation criteria
- Committee members drafted the RFP and evaluation weighted average matrix
- RFP sent to all three shortlisted software companies
  - Background, purpose, key objectives, weighted average matrix
  - Committee developed RFP questions corresponding to each of the 21 criteria
  - Included unscored criteria:
    - Pricing, business and company fit, roadmap, security (IT personnel)

Category	Rating
Cost Management (+ Vista Integration)	7.7
Drawing Management	7.5
Document Management	7.2
Issue Management	6.7
Analytics + Integrations + Platforms	6.6
RIFs	5.6
BIM	5.3
Submittals	4.7
Project Setup and Directory	4.4
Preconstruction	4.3
Daily Logs	4.2
Mobile	4.2
Reporting	4.1
Specifications	3.9
Training and Support	3.7
Meeting Agendas and Minutes	3.7
Photos	3.5
Safety	3.4
Schedule	3.4
Inspections-Forms	3.2
Project Closeout	3.9

RFP Example

Submittals

1. *Does your software include an automated submittal log generation tool? If so, what are the limitations and reporting of this tool?*
2. *Can users bulk import a submittal registry?*
3. *Can your submittal tool automatically generate due dates based on input key criteria?*
4. *Does your software manage submittal revision history?*
5. *Can submittals be annotated directly within your system?*

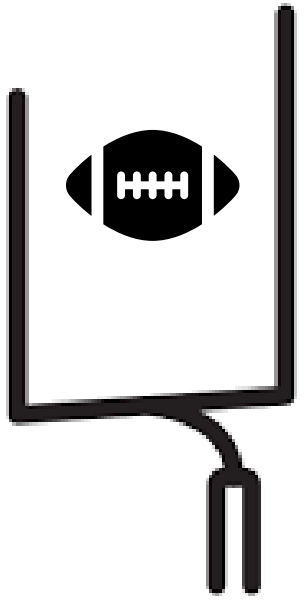
Phase 3: Data Collection

In-Person Presentations + Demonstrations

- Software companies
- Committee + Advisory Members
- Presentations should not be “out-of-the-box.” Should be Clancy & Theys specific.
  - We provided budgets, drawings, project documents for the companies to upload to their systems when presenting to Clancy & Theys

Scoring

- Preliminary Data Evaluations
  - Committee scored each software based on the 21 evaluation criteria
    - Ranking each criteria 1 – 5
  - Committee reviewed scores and removed lowest scoring software from the pool



Scoring Criteria	
1 – not suitable with no roadmap	2 – needs significant improvement with roadmap
3 – acceptable now	4 – acceptable now with improved roadmap
5 – best in class	

Phase 4: Evaluation and Validation

Evaluation Period

- Access into both software platforms
  - Gave hands on experience to help further identify pros and cons
- Further evaluation to expand understanding of each software (over 40 internal and external meetings)
  - Cost management (+ Vista integration)
  - Safety
  - Implementation
  - Pricing (non-voting committee)
  - Roadmap
  - Security (IT personnel)

Validation Period

- Reference calls served as the main source of validation.
  - Spoke with five general contractors

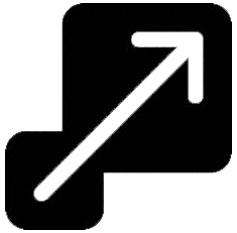
- Management met to select the project management software
  - considering committee recommendation

Validation Period

- The successful platform can host all project data from cradle to grave.
- Standardization workshops led by the successful platform
- Technology: Interoperability
  - Vista Integration
  - Cost management module operated faster, more efficiently and intuitively, more customizable
  - Mobile app increases access to information in the field
  - Cloud-based technology improves collaboration between project teams
  - Automated workflows within tools and modules

Validation Period – Further Considerations

Flexibility



Scalability

Cost

Data Capture

Security Architecture

Path Forward →

1. **IMPLEMENTATION & STANDARIZATION**
    - Duration: Approximately six months.
    - Champion Team: Engaged in standardization workshops.

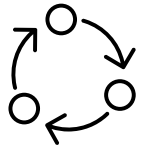
2. **DESIGNATE A SOFTWARE OWNER**
    - Operations Process Manager
    - Dedicated individual tasked with ongoing enhancement of procedures within the project management software
    - Software trainer responsible for educating users.
    - Project setup specialist who configures each project in the software.

3. **TRAINING**
    - Onsite trainings: one in each division.
    - Our construction companies want tools not toys.
    - User empowerment: encourages innovation.

Lessons Learned

PEOPLE

- **Involve stakeholders early**
  - Ensures needs & concerns are met
- **Buy-In**
  - Begins from the top down



PROCESS

- **Have a gameplan.**
- **Define clear requirements.**
- **Evaluate multiple options.**
- **Plan for implementation & training.**

TECHNOLOGY

- **Consider total cost of ownership.**
- **Focus on the capability of technology to connect you company with standardized workflows and software tools.**

ANY QUESTIONS?

ask now or connect to ask later.