

# 6 STEPS TO BUYING ESTIMATING SOFTWARE

Choosing an estimating software for your construction business isn't a decision that should be made lightly. Estimating accurately and efficiently is critical to your business and a determining factor as to whether the business will be profitable.

Most contractors are experts at their craft, not at evaluating estimating software. This article provides the framework to help contractors understand what factors to take into consideration and what questions to ask before choosing an estimating software.

Many contractors will make the mistake of buying software based on price alone. But similar to the construction trade, the lowest price doesn't always mean the best quality or performance. Estimating software is an investment in the success of the business and the following areas should be taken into consideration before making a decision on which product to purchase.



**Only The EDGE™ provides a complete estimating solution—Takeoff and Cost Estimating in just one software application**

## 1. CUSTOMIZATION

Each contractor prepares estimates differently so it is important that the estimating software be fully customizable to the way that your business prepares estimates. The software shouldn't force you to shift the way estimates are created in order to conform to preexisting templates.

A good estimating software company should first get to know your business and understand your methods of estimate preparation. This will allow them to customize the software to fit your processes. For example, if your company is estimating a wall project, there may be multiple labor charges and rates involved for different activities such as framing, hanging, painting, etc. It's important that the software is able to be customized to

in your own company to handle the installation? Less expensive software is often delivered that way along with a do-it-yourself video or user manual that leaves the contractor dependent on internal employees to figure it out.

A good software estimating company should act as a consultant to your business. They should learn about your business processes and give you a realistic expectation as to the time frame for the implementation.

It's also important for the employees who will be using the program to be involved in the process. The more involved they are, the more they will understand the software and be willing to adopt it as an everyday tool for the business. Ongoing training and support will play an important role in the software's success.

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accommodate for varying labor rates attached to that wall, rather than use a flat labor rate as is the case with many lower-priced solutions.

The estimating software needs to be a tool that works the way you do and doesn't make you change your methods and processes. The next thing to ask in terms of customization is how will that software be customized? Is this something that will be left to the contractor to figure out or will the estimating software company take the initiative on it? This leads us to the second consideration: implementation.

## 2. IMPLEMENTATION

Implementation is critical to the success of the estimating software within your business. Ask how the implementation process works and the timeframe involved. If the software company just sends you a disk in the mail or a download link, do you have the resources

## 3. TRAINING AND SUPPORT

Training is key to successful implementation and use of the new estimating software. Review what kind of training the company offers for new users. Some simply send a one-page user guide or provide generic how-to videos that might not address the individual needs of your business.

Other companies may offer classroom-style trainings. That runs the risk that someone might be left behind because they learn more slowly than others in the class or vice versa, a fast learner will quickly become bored. The ideal training situation is to provide one-to-one training either virtually via a web-based meeting program or even better, in person at your company offices.

After training is complete, what level of support will be provided for your users? Many estimating software companies will say that they have an extensive online

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knowledge base and video tutorials. While these are great resources, your users might be working on a deadline to submit an estimate and can't spare the time to search through an online support library. Make sure someone is available to answer a phone call for help to provide a quick resolution to any issues.

#### **4. STORAGE AND SECURITY**

When buying estimating software, it's important to consider options for where the program and the data are stored. If a program is stored locally on an office computer, security is left to the contractor. If the program is hosted on the local office network, be sure that the program offers security tools that restrict access to the database.

Restricting access to the database protects sensitive information such as material costs, labor costs and more from being downloaded and potentially taken should an employee or estimator leave the company. Setting accessibility levels for different users is also an important

feature for ease of operations and consistency. The accounting team may require access to view reports or other information but shouldn't have the ability to edit or make changes, whereas the estimator needs the permission to build the estimate and edit as needed.

Many options today offer cloud-based programs and data storage. While this has an attractive convenience factor be sure to ask about hosting and security. Be sure that the software company uses a reputable cloud with redundancy; meaning that they rely on multiple server farms around the country so that if one goes down, its program and data will automatically switch over to a backup location for seamless operations.

#### **5. INTEGRATIONS AND REPORTING**

It will be important for your estimating software to be able to integrate and interact with the other business tools your company relies on, such as customer relationship management (CRM) software and accounting software.

Integration with accounting software is important for creating budgets for projects, job costing and determining where projects are compared to the budget. Communicating with your CRM software will be important for having up-to-date data on each customer and their project history with your company.

Reporting is also an important feature to look at when buying estimating software. What reports will accounting need and does the software have the ability to deliver? What reports will the field crew need in the field? Be sure the software can produce detailed reports that communicate information on the project to crews, the materials and the labor allocated to perform each specific task.

Reports to the customer will be equally important with change orders common on most projects. When a change comes, your company needs the ability to

quickly communicate that change to the customer along with the associated costs.

## 6. COMPANY EXPERIENCE

The last thing to consider before making your purchase of estimating software is to look at the company that is offering the product. Advances in technology have brought a lot of estimating solutions to the construction industry—many of which have been offered in the last couple of years by technology companies who might not understand the construction business.

Look for a company that has an established track record in providing software solutions to the construction industry. Ask for references. It's important to talk to other contractors about their experience in each of the areas we talked about—from the customization, implementation, training and support, through the daily use of the tool in their business.



### About the Author

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Built by trade experts, The EDGE™ is a construction Takeoff & Cost Estimating software solution that enables estimators to automate the process for greater **accuracy**, increased **efficiency** and **consistent** estimates across your company with **anytime, anywhere access**.

Increase job profitability and use it to measure and price the job, review the bid and manage the job by sharing the takeoff details and the estimate with key personnel.

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