The Liberated Practice

Part 3:

Digital Transformation for the Construction Industry

WOODARD™

About the Presenter

- Founder-The Profit Constructors
- Host of Construction Junction Podcast
- Host of Construction Junction Roundtable
- QuickBooks Advanced Certified
- Knowify Certified Advisor
- Wife, mom, chocolate lover

Learning Objectives

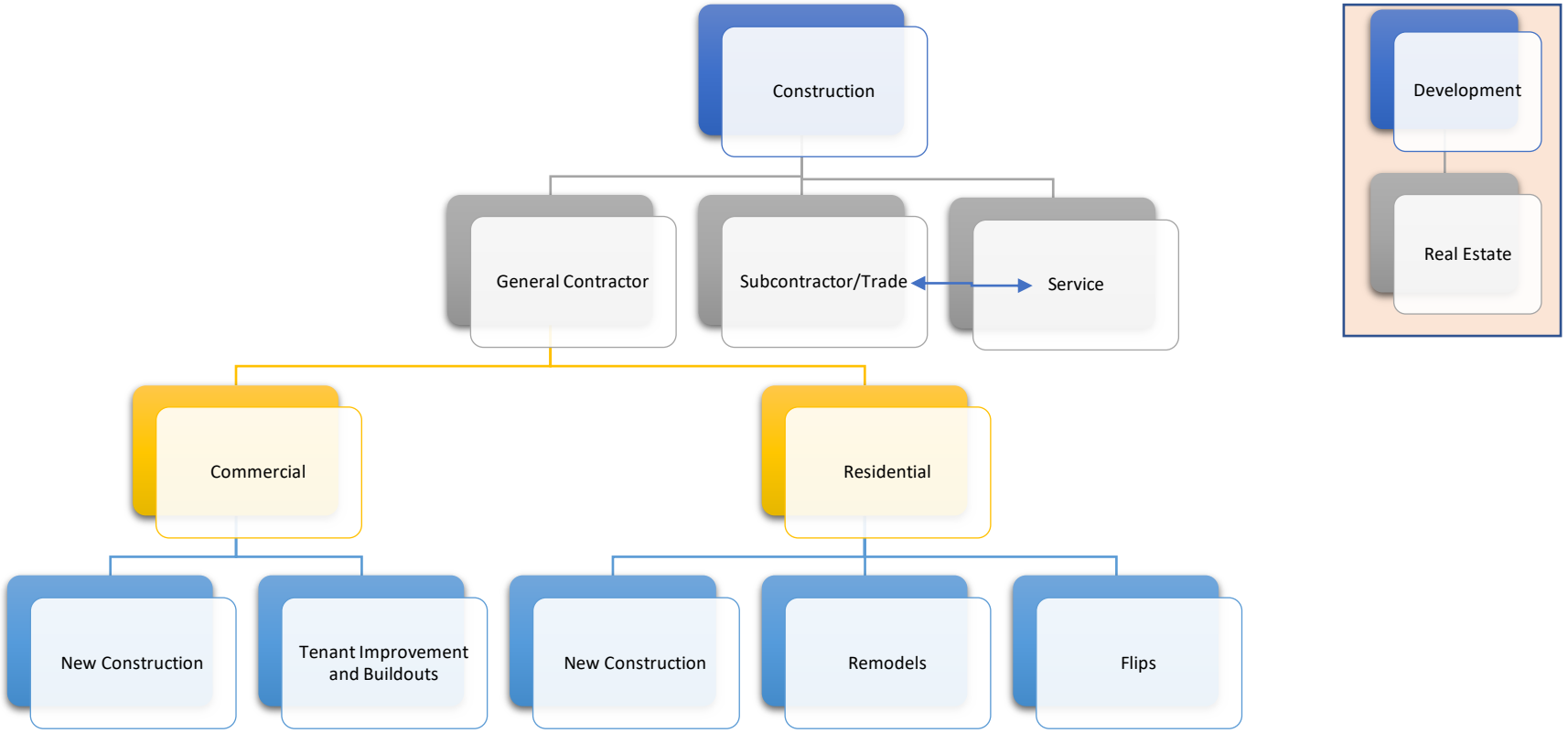
Liberate Your Clients FROM:

- Project Cost Accounting Workarounds
- Item Prison
- Paper Overload

Liberate Your Clients TO:

- Real-time Data
- Better Back-Office / Field Communication
- Better Work Life Harmony

“Construction” Means What?



Example: Feature Needs Assessment

Service Dept

- Scheduling & Time Tracking
- Purchasing
- Billing

New Construction Dept

- Estimates
- Purchasing
- Scheduling & Time Tracking
- Billing

Office Staff

- Purchasing
- Time Tracking

Management

- Reporting
- Commissions

Example: Commercial General Contractor

$500k to $2m	Knowify	Budgeting, Estimating, Limited Task Management, Subcontractor Management, RFIs, Scheduling, Time Tracking, Invoicing (Including AIA billing), Cost Tracking, Customized Forms, Graphic Project Dashboard, Mobile App, limited 2-way sync to and from QBO
	RedTeam Go (formerly Paskr)	Preconstruction, RFPs, Budgeting, Estimating, Subcontractor Management including sub submittals, RFIs, Scheduling, Time Tracking, Invoicing (Including AIA billing), Cost Tracking, Pre-designed forms, PDF WIP reporting, PDF project profitability reports, Mobile App, 1-way Sync from RedTeam Go into QBO
$2m to $10m	ReadTeam Flex (formerly ReadTeam)	Preconstruction, RFPs, Budgeting, Estimating, Task Management, Subcontractor Management, RFIs, Scheduling, Time Tracking, Invoicing (Including AIA billing), Cost Tracking, Customized Forms, PDF WIP reporting, PDF project profitability reports, Mobile App, 1-way sync from RedTeam Flex into QBO, direct integration with Levelset
	Corecon	Preconstruction, RFPs, Budgeting, Estimating, Subcontractor Management, Daily Logs, Meeting Minutes, RFIs, Scheduling, Time Tracking, Invoicing (Including AIA billing), Cost Tracking, Estimate to Procurement Wizard, Workflow Rules, Advanced Business Intelligence Dashboards, Financial Dashboard, requires separate link software to connect to QBO

Example: Residential General Contractor

$500k to $2m	JobProgress	Budgeting, Estimating, Subcontractor Management, Scheduling, Time Tracking, Invoicing, Cost Tracking, Customizable Financial Reports, Mobile App, limited 2-way sync to and from QBO
	Knowify	Budgeting, Estimating, Limited Task Management, Subcontractor Management, RFIs, Scheduling, Time Tracking, Invoicing (including T&M, cost plus and other variable types), Cost Tracking, Customized Forms, Graphic Project Dashboard, Mobile App, limited 2-way sync to and from QBO
$2m to $10m	BuilderTrend	Preconstruction, RFPs, Budgeting, Estimating, Task Management, Subcontractor Management, RFIs, Scheduling, Time Tracking, Invoicing (Including AIA billing), Cost Tracking, Customized Forms, Cash and Accrual WIP reporting, PDF project profitability reports, limited 2-way sync to and from QBO, direct integration with Home Depot
	Corecon	Preconstruction, RFPs, Budgeting, Estimating, Subcontractor Management, Daily Logs, Meeting Minutes, RFIs, Scheduling, Time Tracking, Invoicing (Including AIA billing), Cost Tracking, Estimate to Procurement Wizard, Workflow Rules, Advanced Business Intelligence Dashboards, Financial Dashboard, requires separate link software to connect to QBO

Example: Specialty Trade/Service Contractor (HVAC, Plumbing, Electrical, etc.)

Service Only	Jobber	Scheduling, Dispatching, Time Tracking, Invoicing, Mobile App, Online Booking, Customizable Job Forms, Client Hub, Marketing, Credit Card Processing, Reporting, Manual Sync with QBO
	Housecall Pro	Scheduling, Dispatching, Estimates, Time Tracking, Invoicing, Mobile App, Recurring Service Plans, Online Booking, Customizable Job Forms, Marketing, Call Answering Service, Credit Card Processing, Financing, Reporting, Open 2-way sync to and from QBO
New Construction with or without Service	Knowify	Separate New Construction area from Service Area, Budgeting, Estimating, Limited Task Management, Subcontractor Management, RFIs, Recurring Service Plans, Scheduling, Time Tracking, Invoicing (including T&M, cost plus and other variable types), Cost Tracking, Customized Forms, Graphic Project Dashboard, Mobile App, limited 2-way sync to and from QBO
	BuildOps	Separate New Construction area from Service Area, Preconstruction, RFPs, Budgeting, Estimating, Subcontractor Management, RFIs, Recurring Service Plans, Scheduling, Time Tracking, Invoicing (Including PDF AIA billing), Cost Tracking, Graphic Project Dashboard, 1-way sync to and from QBO

Peripheral Apps

Time Tracking

- Busy Busy
- ClockShark
- Workyard

Lien Waivers

- Levelset
- lienwiavers.io

Others

- Adaptive
- Nettracker
- HammerZen

Discussion Topics

- Liberated construction clients are free FROM old ways of doing things and free TO pursue myriad other things more important to them.
- It's important to understand exactly what a construction client does and needs PRIOR to suggesting apps and solutions

Panel Discussion

A conversation with experts in the areas of Construction

Panel Conversation

Joe Woodard
Founder and CEO
WOODARD EVENTS

Diane Gilson
Consultant, Trainer, Author
Info Plus Accounting, Inc

Laura Madeira
Owner ACS, Inc.
ACS

Cameron Garrant
VP of Marketing at Knowify
knowify

Submit questions for the panel using the chat feature.

Note: This segment is an interactive conversation with inventory experts. No slides will change during this segment.

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