



 **CONNECT**

Tech Stacks for Construction Client Success

Leslie Shiner

November 7th, 2018

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CPE Process



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- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPE**
- CPE certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

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Today's Speaker



Leslie Shiner
Owner, The ShinerGroup

Financial & management consultant for over 25 years

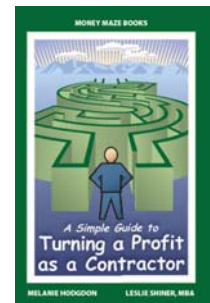
- MBA in Accounting and Finance from U.C. Berkeley
- Advanced QuickBooks ProAdvisor

Columnist (Remodeling Magazine)

CPA Practice Advisor Top Thought Leader

Author:

- *A Simple Guide to Turning a Profit as a Contractor*
- (www.MoneyMazeBooks.com)



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Agenda

- Explore different programs and applications available for contractors
- Analyze how to integrate technology within your company
- Obtain an overall understanding of accounting, project management, time tracking and other solutions available
- Discover ways to reduce multiple information sources and data input

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How Are You Utilizing Technology?



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Caution!

This presentation includes only a high level survey of tools and products available for remodelers

It's not complete by any means!
It's not a sales presentation
And we only have 60 minutes!



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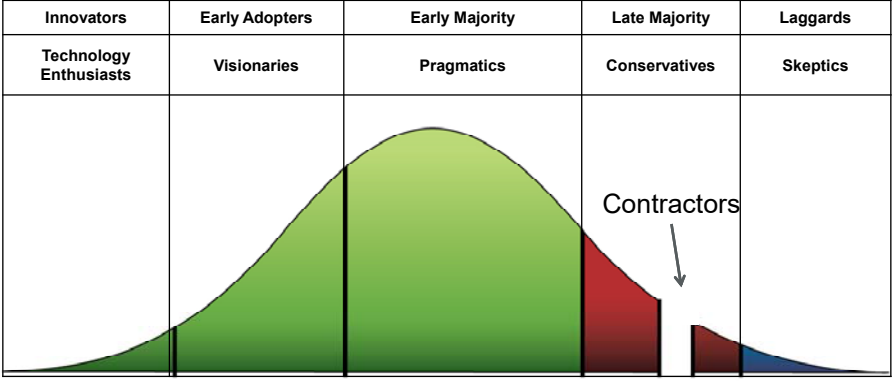
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“Construction professionals have been slow to adopt mobile apps, cloud-based systems and other technology, but are slowly recognizing the advantages tools offer especially in terms of cost-cutting and quicker communication.”

*JBKnowledge Inc.'s Construction Technology Report

<https://jbknowledge.com/2017-construction-technology-report-survey>

Technology Adoption Cycle



Where are you?

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Much is Still Done Manually

Or created using Excel®

How is data collected in the field?



<https://jbknowledge.com/2017-construction-technology-report-survey>



Find Solutions for Different Needs

- Project Management
- Estimating
- Scheduling
- Accounting
- Time Collection
- Customer Relations Management (CRM)
- Others?

The question to ask:
“Can they talk to each other?”

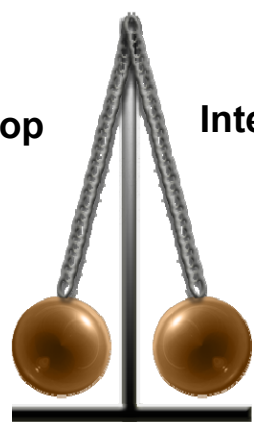
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The Pendulum Swings

One-Stop-Shop Software

Integrated Programs or Apps



What are contractors looking for?

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Integrated Programs

The goal is “interoperability”
Having systems that “talk” to each other



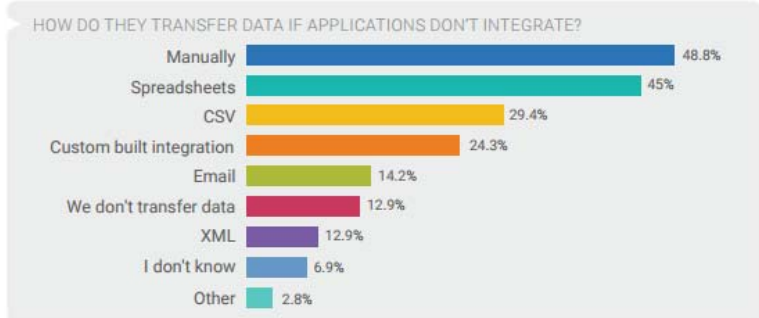
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How is Data Integrated Today?

“Survey says!”

Once again, manually and spreadsheets win the day



<https://jbknowledge.com/2017-construction-technology-report-survey>

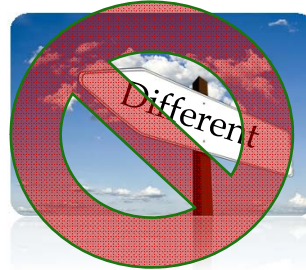


Change

People want things to be better



Just as long as they are not any different



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Start with Accounting?

QuickBooks is the market leader for accounting for contractors

But what version?

- Desktop vs. Online

QuickBooks Online is the future

- But as of today, it has limited to no job costing

QuickBooks Desktop

- Need to create strict rules and follow them to get the management information needed
 - Even though QuickBooks will let you break the rules!
- Not mobile or web based
 - (unless using 'hosted' version)

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Integrate Apps with QuickBooks?

Let QuickBooks do what it does best!

- Manage cash in and cash out
- Then find other systems to meet the needs of the contractor

Look for systems that integrate with QuickBooks

- However, easier said than done
- Not all integrations work the same
- Not all integrations work as promised

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Be Aware of One-Way Streets

Determine Workflow for your contractor clients

Where do you enter the information first?

And more importantly, where do you change or update the information?

- Is there bi-directional syncing?

Who is responsible for entering, modifying and managing the information?

Finally – which product will be used to create reports?

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The Type of Contractor is Important

General Contractors may need:

- Estimates and Proposals
- Create Change Orders
- Track Change Orders
 - Prime (Client) and Budget (Costs)
- Job costing
- Progress Billing (AIA)
- Subcontract Control
- Time tracking (with Certified Payroll)
- Client portals
- Transmittals, Submittals

Trade Contractors may need:

- Work Order Tracking
- Dispatching (Scheduling)
- Invoicing at client site
 - Receive payment at client site
- Inventory management
- Time tracking
- Expense tracking

Decide what's most important

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Robust Integration

- Cloud based
- Estimating
- Contract administration
- Change order management
- Procurement
- Dashboards
- Scheduling
- Time Tracking



For Commercial Contractors



For smaller GC's

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Builder Trend



For Remodelers and Home Builders

Pre-sale process

Limited estimating

Project management

Daily logs, scheduling, documentation

Financial tools

PO's, Change Orders, Limited integration with QuickBooks

Customer management

Client portal and mobile app

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CoConstruct



For Remodelers and Home Builders

Single entry estimating

Including lead tracking

Track change orders & expenses

Create change orders and get sign-off

Focus on client communications

Captures and tracks communications

Coordinate schedules

Project specific as well as company overall

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Knowify



For Trade Contractors

Focus: Invoicing and cost tracker

Job costing tools with dashboard

View project and budget progress

Invoicing

Including progress invoicing, and T&M (Time and Materials)

Contract and Change Order Management

With built-in e-signature capture

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Other Solutions

For Trade Contractors

Scheduling, dispatching and invoicing

Service Titan



ePonte



FieldEdge



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Other Web Project Management Tools

Project Management

UDA Technologies

Integrated approach to project management, project scheduling, and customer management

Procore

Project collaboration, including submittals, RFIs, contracts, schedules, and drawings

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Mobile Time Collection

Lots of options for mobile time cards

Beware of website entry vs. application entry

Some include GPS

Make sure you can limit jobs, items (or cost codes)

Some come bundled with a payroll service

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Mobile Time Collection– Just A Few Construction Examples

Just A Few Construction Examples



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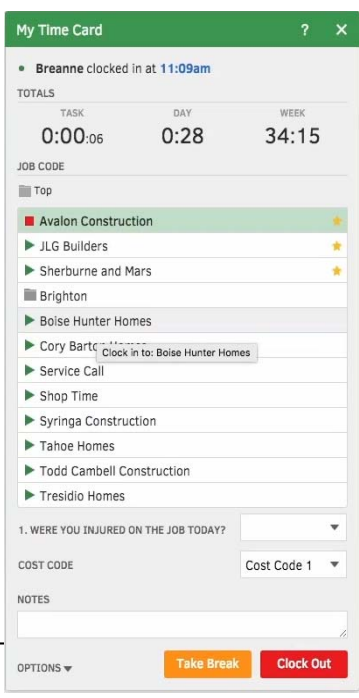


T-Sheets Example

Specific to Contractor Needs

DCAA and DOL Compliant

Worker's Comp Audit Compliant
Requires clock in and clock out time, not just hours
(Check your State's laws)



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CRM Packages

Customer relationship management

- Track sales, leads, etc.
- Typically integrate with Outlook

Zoho



Method

method:CRM

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Method

More than a CRM system

- Field Services for dispatching

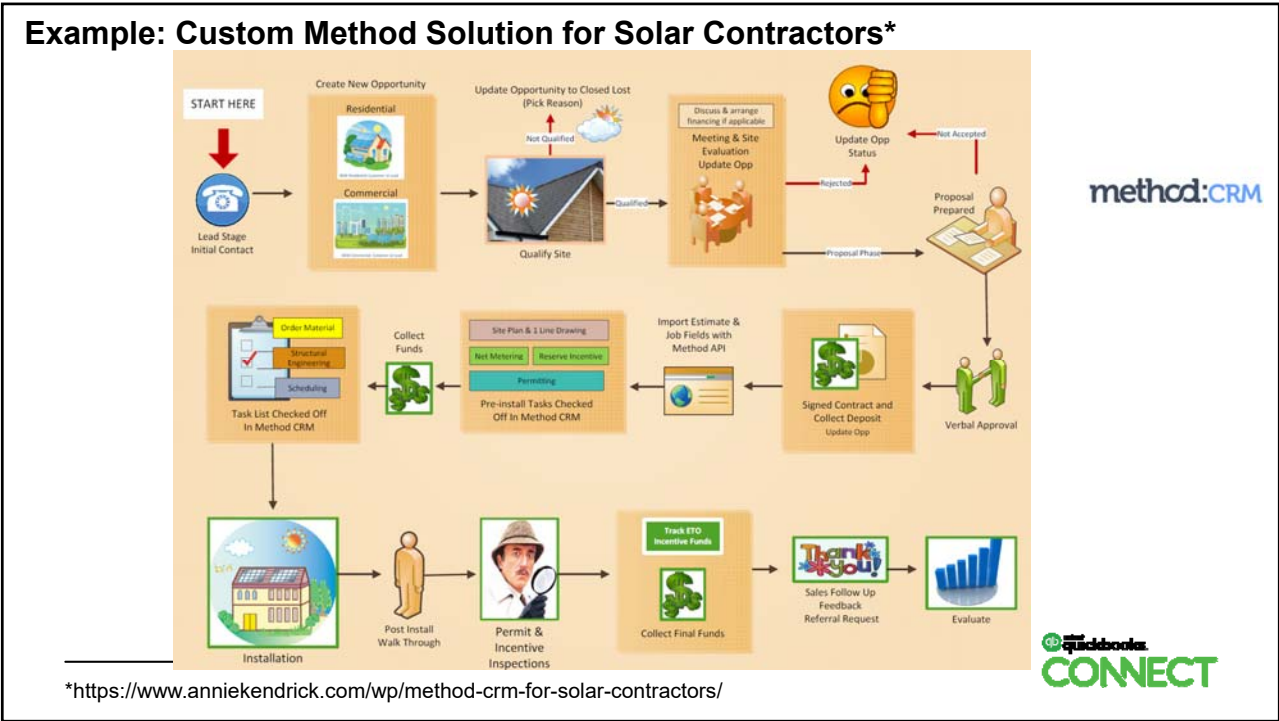
Allows you to customize the software to the way you operate

- Instead of having to change operations to match the software
- Full integration with QuickBooks

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Single Use Apps



Apps that focus on just one solution

- Can be used in conjunction with other apps

Example: Receipt Management

- Expensify
- Receipt Bank

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Visit the app store

<https://appcenter.intuit.com/>

Search on Construction, Project Management, Scheduling, Job Costing, etc.



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Sometimes Simple is Better (and Cheaper)

Did you know how powerful Google is?



- Each job has its own email, calendar, Google docs page...
- Can be used for scheduling
- Can be used for sharing documents
- Can be used for tracking documentation
- Can even use Google Voice for specific phone number by job
 - Transcribes and texts phone messages

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Absolutely Awesome Field Apps That are Free*

*Or practically free

Fieldwire

- Plan viewing, document management, scheduling & punch list management

The iHandy family of apps

- iHandy Carpenter (\$1.99), iHandy Level (Free)

My Measures

- (\$7.99 or free version)

Roof Pitch Factor, Pitch Gauge, Rafter Help...

OSHA Heat Safety Tool, Concrete & Agg Calculator

Just Search "Construction" in your App Store



It's So Confusing!



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Moving Forward

- Do the research!** • *Get references and talk to users*
- Test integration** • *Don't just listen to the sales person*
- Budget for training** • *Budget for testing too!*
- Create a plan** • *Implement in phases and project manage just like a construction project*
- Start small** • *Test with innovators, not complainers*

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One Step at a Time

- Determine needs**
- Do the research**
- Create a plan**
- Implement the plan**



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Leslie C. Shiner, MBA



Questions?

LShiner@ShinerGroup.com
(415) 383-6255

www.ShinerGroup.com

www.facebook.com/TheShinerGroup

Twitter: @TheShinerGroup



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