

Managing a Tech Change in Your Business

Some of us have been in this business long enough that we remember when using a computer for much more than email was novel. I remember reading David Gerstel's book, "Running a Successful Construction Company" (the 2002 updated version), which proposed using a computer and MS Excel as an alternative way to do estimating. We have seen smartphones become standard equipment for even the most tech-challenged project managers. Project management systems, cloud-based file storage, estimating software, company chat channels, drones, and 3D scanning are part of most remodelers' tool kits these days. What would you have said five years ago if someone suggested using Zoom for a sales meeting? Now, we are watching another generation of project management systems enter the market.

With so many systems, and options within them, available, technological change is an inevitable part of business. Working through a big tech system change can be difficult and is bound to create interference in your business for months, at best. Most of the time, you won't know where that interference will show up until it does. Upset team members, confused clients, lost files, or muddled books are all possible collateral damage. Adding or changing systems is necessary in our current working environment, however, so we as managers need to be prepared to integrate them into our businesses as smoothly as possible.

IS THE RISK WORTH IT?

There are many reasons to embark on a tech change despite the risks. In some cases, we're forced to. For example, I had used CoConstruct for 10 years before its merger with Buildertrend. My choice wasn't whether to change, but to change now or change in a few years when the old product was no longer supported. I decided to change now and have spent the last 12 months sunseting CoConstruct and integrating JobTread into our workflow, instead. Another change many of us are facing is moving from QuickBooks Desktop to QuickBooks Online. It seems inevitable that the desktop version will eventually be a thing of the past. In both these cases, an integral part of our business operation is being changed externally, and we are being forced to adopt something new.

It's important to not get stuck in an "if it ain't broke, don't fix it" mentality. Making improvements is different from fixing problems; small gains in efficiency add up to big time savers over the long term. Take buying a computer and learning Excel for estimating instead of using a yellow legal pad: Your legal pad ain't broke, so why invest the time and money in learning Excel? I'd say that the gains from using

a spreadsheet over a legal pad are more than incremental, but you get the point. The same is true for switching from email to Slack for internal communication or from an Excel spreadsheet to management software; the gains are real and worth the effort and time to make the change. That doesn't mean that every possible change you can make should be made. There are plenty of reasons to not adopt or change systems, but "it ain't broke" is not at the top of the list.

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MANAGING CHANGE

To smooth over the rough spots for all involved in the transition, we made a number of adjustments:

Embrace change. The idea that a system today will remain the same for 10 years is a fantasy. Systems change rapidly, the machines that we use to interface with them change rapidly, none of this is slowing down, and all we can do is to embrace this as a fact of the world we work in. Make change part of your culture.

Be clear on the reasons. Next, proactively identify reasons to make a change. To start with, look for bottlenecks. Then ask: Are there problems, or processes that aren't followed? Have you unsuccessfully tried to create compliance? There could be a tool that will address these issues. I avoided doing seasonal email newsletters, for instance, because the system I used instead of a CRM could not give me a list of email addresses for past clients.

Commit. It's OK to explore the available systems to address the problems you identified, but be intent on making a committed decision. There are so many options, it's easy to get stuck in the multiverse. Many software tools offer an introductory version for free or a 30-day trial with a "money-back guarantee." Though the free versions may not include all the application's features, you can play around with them to see what they can do and what feels right.

POSSIBLE REASONS NOT TO CHANGE

Cost. Good software is expensive, and most cloud-based systems charge a monthly fee. As you add systems to your “tech stack,” the line item for software expenses in your budget will need to increase. Ask yourself if you can get by without this added system or if it will add value to your business. Also, take stock of what you are currently using and remove redundancy if you add a system that replaces the functionality of an existing one.

Not intuitive and takes too long to learn. Every system will have a learning curve, but the investment of time that will require should not prevent you from adopting it. On the other hand, not every system is designed to be implemented and operated by the average person. Make sure that you are not biting off more than you or your team can chew.

Not applicable to your industry or a business of your scale. Not every system works for every type of business. In the remodeling and construction world, there are systems that would be a perfect fit for the contractor who is building a new hospital or a bridge but would not work for a business whose sweet spot is \$250,000 additions and remodels. Likewise, the system that works great for a single-line roofing or exterior contractor will be different from what a custom kitchen specialist will need. Find a system that is designed specifically for your type of business. —Z.S.

Be clear on features. Create a list of features you want and measure the options against it. I suggest you include “Open API” for integration with outside systems; the capability of uploading to and downloading from the system; and good support responsiveness and training resources. If a system checks your boxes, proceed.

Assign someone to “own” the new tech. As you integrate the system into your business, different team members will interact with it differently depending on their roles and responsibilities. Not everyone in your office needs to be an expert, but one person in the office should own the responsibility of knowing the system through and through. In most small remodeling companies, this will likely be the business owner; however, it doesn’t have to be, and there are many reasons that it should not be. Having someone else spend the time to master a new system or link it to another open API system will free the business owner to focus on higher value tasks.

Get buy-in from your team. As I have transitioned to using JobTread at my business, I have had some great conversations with Anna Hunter, director of learning and development at JobTread, about how best to integrate a new system into an organization. I asked her for specifics about how to get team buy-in.

Hunter’s recommendation is to introduce change to your team early and often. She says, “Team members adapt to change

in various ways. Some may adapt quickly and effortlessly, where others may take time to adjust to change. Communicating about change as early as possible gives everyone on your team the chance to navigate the change process at their own pace. Many leaders think that they need to know every detail about the change before they ‘announce’ it to their team. This just delays the inevitable and reduces the time some team members may need to process that change is on the horizon.”

“When introducing an upcoming change,” Hunter continues, “there are three goals: Clarify the current cause and effect relationship of the failed system; gain consensus that a problem exists and that change needs to happen; and secure commitment to resolve the problem. All the details (who, what, why, when, and how) can be addressed later.”

When I decided to consider alternatives to CoConstruct, I sent a survey to my team to give me feedback about what worked and, more importantly, what didn’t work. Asking about what didn’t work got everyone talking about the problem and gave them opportunity to clarify for themselves “why” we were making this change, as well as build consensus that something needed to be done.

Identify team members who can get onboard quickly, advocate for the change, and learn the new system. Some of your team may be 100% onboard at the mention of a new system, others could be indifferent, and some could be vehemently opposed to the idea.

“Consider which employees seem to embrace change and show an eagerness to explore new possibilities,” Hunter suggests. “Find your team members who tend to cope well with uncertainty and even take it upon themselves to ensure they are well informed. Team members who try to understand the ‘why’ behind a change can more easily build support among their peers as they will align themselves with the change and will be eager to share a vision they believe in.” As they get excited about the change and learn the system, they will ease the transition for the oppositional team members.

And once you have buy-in from your team, build momentum and follow through. Being systematic and setting team goals for the transition will be important.

Iterations are OK. It’s OK to partially establish a minimum functionality or understanding that you need to use the tool and move forward with that. Think about your smartphone: Most of us have apps that we never use or even know what they do. That doesn’t stop us from using our phones to make calls, read emails, send texts, and manage our calendars. A tech tool still provides value even if you are not using 100% of its functionality. As you become more familiar with a system, you can use more features or improve on your earlier processes.

Make sure to be open with your team and clients (if client facing) about the iterative nature of the transition and what you know and don’t know. While implementing JobTread, my team spent a lot of time adjusting our workflows. When we put our heads together and decided how we were going to handle a process in the new system, I always reminded my team that this is where we are now and, in a few weeks, we may need to make adjustments. Over time, the processes that work will stick, and there will be fewer revisions.

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—ANNA HUNTER

Where are you going? Make a list of what you need to do when you implement the new system. What functions in your current system do you need to replace? What steps do you need to take to build those features in the new system? Some items will take more effort than others, and some items will be more important. Prioritize your list by difficulty of implementation and importance to your operations. Identify “low-hanging fruit” that you can switch over to tomorrow with some basic training. Focus on those first and get them out of the way so you can concentrate on the more challenging changes. Some of the things that you will want the new system to do will be possible only after you have had real jobs or customer accounts running in the system for some time.

Again, Hunter had suggestions about how to do this and build team buy-in at the same time: “Involve your team in the implementation work. Identify each of your team member’s strengths and delegate implementation responsibilities to them based on what they are good at and what they enjoy doing. Some of your team members enjoy creating systems and workflows while others enjoy organizing data. By inviting them in to help set up the new technology, they will feel committed to the end result and ensure your implementation is successful.”

Hand off as many to-dos from your list as you can. And whenever possible, Hunter recommends, “invest in your team members by sending them to additional training for the software, such as a conference, workshop, or meeting. Not only will they feel valued because you invested resources in their professional development, but they will also connect with a greater community of people who use the technology as well. After all, your people will determine the success of the tools you have. Keep them at the center of the change process and they will see it through.”

Create milestones and goals for adoption. Map out when those changes will happen and set a goal for when to have all new projects in the new system.

If you are like most remodelers I know, projects can last for a long time, so when you are changing to a new project management system, you will be sunsetting your old system over several months and operating both systems simultaneously. I would caution against trying to move a project from one system to another

mid-stream, but you might have a step in your process when you can make the switch. At our design/build company, we work through a long custom design process that turns into a construction project. Design can take as long as six or even nine months, and construction, depending on the scale of the project, can take another six to nine months. Looking at the projects we had in the design phase, I quickly realized that if we did not switch them to JobTread, we would be running two systems for another 12 to 18 months. To avoid that, we decided to move our design projects from CoConstruct to JobTread at specific design milestones or when the job changed from design to construction. This added extra work to keep track of project financials, but it shortened the sunsetting time substantially and was worthwhile.

Include others. If the new tech is client facing, be prepared to train clients and trades. When a good system is set up properly and well understood by the team operating it, external users shouldn’t need a lot of training, but they will have different aptitudes for tech and some may need more assistance than others. I create my own client-facing training videos to address the most important features of JobTread that our clients need to understand to make the system work for them. I use a program, called Camtasia, that provides the ability to edit videos and make templates so you can create a repeatable format for making videos. Having a small library of videos on hand saves me time scheduling and doing one-on-one training with clients and trade partners. People can watch the videos when and how they want to and pause/repeat as needed.

INSPIRES EXCITEMENT OR FOSTERS DREAD?

Not many things in life are certain, and we have control over even fewer. In the 21st century, one thing that is certain is that technology will change, probably faster than we want. We cannot control how, when, or why the systems we use will update, change, or merge with the competition. What we can control is how we manage these changes to minimize disruption.

I was an early adopter of the CoConstruct system, and I can remember feeling that I had no idea what would happen if CoConstruct disappeared. But when confronted with that reality after learning about the merger with Buildertrend, I experienced a feeling of opportunity rather than fear of the unknown. Maybe the merger would be great for the system. Or perhaps I could shed a comprehensive management system all together and operate our systems with home-built spreadsheets and calendars. Or was there something available that was completely different and much better? I acknowledged that changing our system would take effort and cause unforeseeable operational hiccups. But I also saw the potential for improvement. After finding JobTread, learning how to use it, and shepherding my business through this change, I can say that the upside has been well worth the effort. The most surprising thing has been how quickly after starting to learn JobTread my team wanted to jump in with both feet and not look back.

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