

How to Successfully Implement Procore

With Whitaker/Ellis's Project Engineer, Casey Walker

Ready. Set. Implement.

Whitaker/Ellis is a specialty concrete contractor based in Portland, Oregon since 1997.

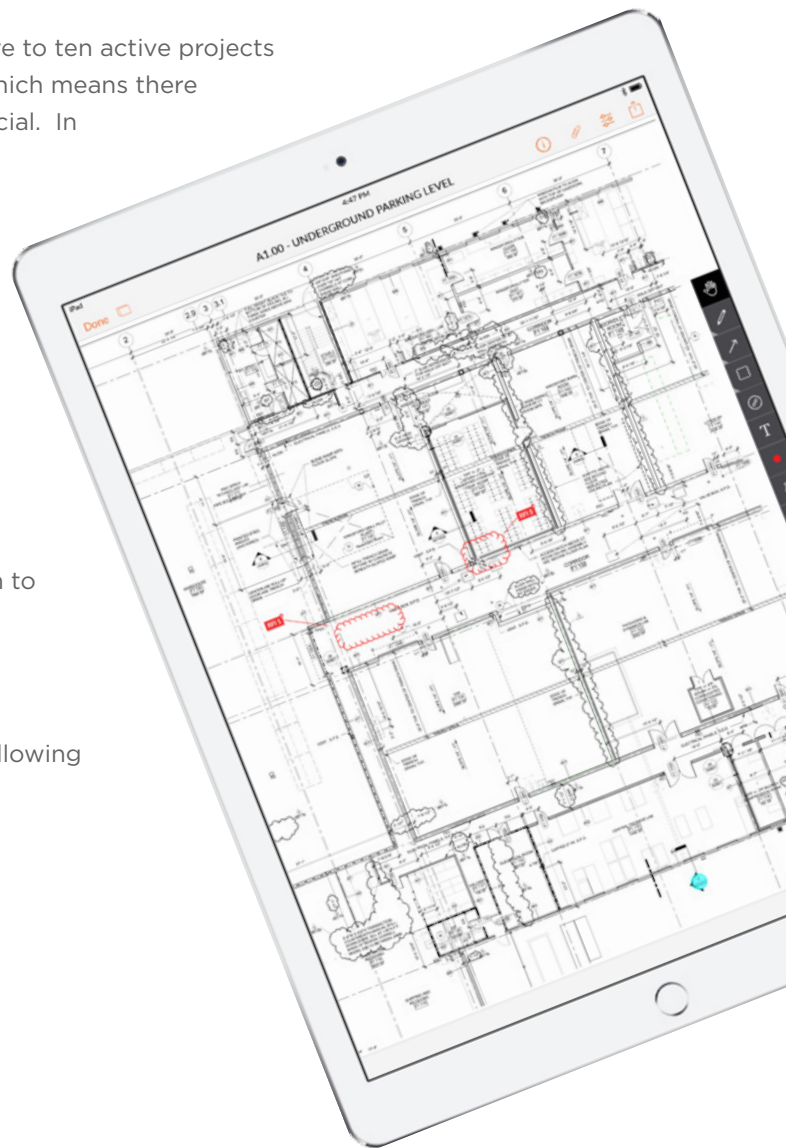
Their teams used a combination of Microsoft Outlook, Dropbox, and Excel to manage their projects. None of these solutions were integrated or allowed for the communication and collaboration necessary for maintaining efficiency on fast-paced projects.

At any given time, the Whitaker/Ellis team is working on five to ten active projects at once, with another ten projects in queue for planning, which means there is little room for mistakes and real time collaboration is crucial. In order to continue their reputation of great work, upgrading outdated project management solutions was necessary.

With Procore, Whitaker/Ellis' Project Engineer, Casey Walker, was able to implement a solution that could solve his company's problems.

Procore's document control functions, collaborative tools, and cloud based platform allowed Whitaker/Ellis' field and office teams to communicate and collaborate in real time for efficient workflows. Procore Drive has eliminated the need for a separate Dropbox solution and allows their team to store an unlimited number of documents.

But Casey says that the real winning play for the Whitaker/Ellis team was not having to wait months for a lengthy implementation. Procore was implemented within weeks, allowing their teams to streamline workflows on all of their projects.



Casey Walker's Tips for Successful Procore Implementation



KEEP TEAMS IN THE LOOP

As soon as Whitaker/Ellis signed with Procore, Casey began setting up 30 minute meetings with his teams. His agenda addressed the reasons for adopting Procore, how better efficiency could save everyone time and money, and the general plan for software rollout. He found that engaging his teams in the process increased their willingness to adopt a new solution.



PARTNER WITH AN IMPLEMENTATION MANAGER

Procore provides all teams with a dedicated implementation manager (IM). Together, Whitaker/Ellis and their IM navigated the onboarding process, set general timelines, and implemented strategies to reduce their time to value. Each week the Whitaker/Ellis team was well ahead of schedule. "Because onboarding was so easy, we finished ahead of schedule and were working efficiently in Procore as soon as we needed to."



TAKE ADVANTAGE OF 24/7 CUSTOMER SUPPORT

In-between appointments with their dedicated implementation manager, Whitaker/Ellis used Procore's world-class support team to answer questions in order to ensure there weren't any lingering questions and there was minimal downtime during the onboarding process.



DEMONSTRATE PROCORE'S INTUITIVE WORKFLOWS

Casey has worked with a wide range of collaborators. But he says that even those with little technology experience are able to learn the workflows quickly. "One field collaborator that I'm working with now has rarely used computers, but I'm pleasantly surprised with his progress. I've only worked with him a few times and he's already looking through drawings, managing RFIs, and submitting daily logs. All the feedback I'm getting is that it's really intuitive."

"As a subcontractor, we don't have years to plan projects. Our schedules are very fast-paced so we needed a solution that we could implement now. Procore helped us to succeed."

CASEY WALKER,
PROJECT ENGINEER