— SPECIALTY CONTRACTORS

Guide to the Guide



PROCORE®

2021

— INTRODUCTION

A guide to building better starts here.

Rolling out new technology to your field teams can be both exciting and challenging. In order to help set you and your field teams up for success, Procore worked side-by-side with your industry peers to identify ideal tool adoption strategies and initiate key conversations to ensure you've set clear expectations and everyone is on the same page regarding what success looks like.

To get started, check out the following recommended onboarding paths here. These paths were created using the advice and guidance of your peers and have been identified as paths that get your field teams comfortable using Procore—without overwhelming them. Use these recommended paths or let them inspire you to create your own custom path.

Second, fill out your company- specific Field Onboarding Guide throughout your Procore Implementation Phase, leveraging your Procore Implementation Manager for feedback. Begin by filling out all editable fields. Once you've completed the workbook, you can save the PDF and distribute it to your teams.

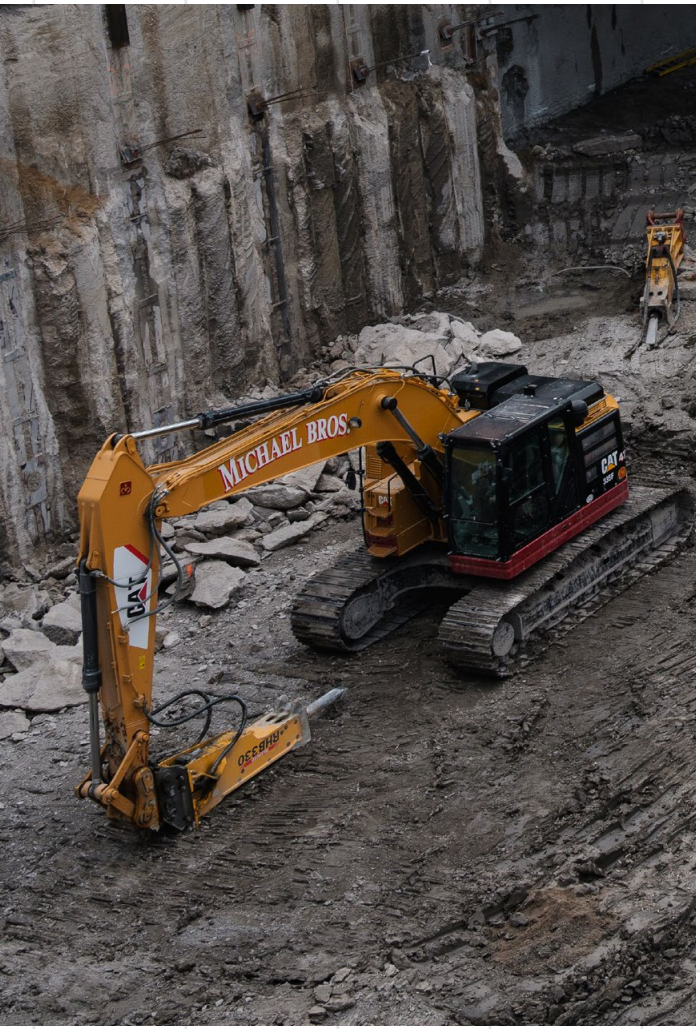
Lastly, have your field teams leverage your completed guide in tandem with these training videos. These are short, but effective, mobile training videos that will give them enough information to navigate each tool successfully.

"Within six months, individuals were able to run two jobs at the same time. I wouldn't have thought that to be possible."

Jake Walters
Project Manager
Haggard Electric

"I wish I had this guide 2 years ago. It gets rid of 80% of the fear and unknown that goes along with transitioning to technology."

Matthew Slaughter
Project Manager
Victory Woodworks



— HOW TO LEVERAGE THE CONTENTS OF THIS GUIDE:

Our top challenges.

The top challenges that initiated your evaluation of Procore should be listed in the "Our Top Challenges to Focus On" section of the guide. For the purposes of this guide, it is helpful to make these challenges field specific. We recommend you survey your field prior to filling out this guide to get feedback from your field teams directly on areas they feel there are challenges. By listing challenges that they have brought to your attention, you are giving them a voice and will be more likely to want to help in the solution.

All your apps. Integrated.

Often times, introducing a new piece of technology can feel like "one more thing", but with Procore's app marketplace you can connect to, and leverage the data of applications you're already using. This reduces double entry across teams and ensures that up-to-date information makes it into the hands of the right people. So, Procore isn't just one more thing, it's actually streamlining communication while allowing your teams to continue using the tools they love. We have listed some of the most commonly used integrations, as well as free integrations to connect today. Check out the Procore App Marketplace for a full list of integration opportunities.

Phased rollout.

Each phase of onboarding a set of Procore tools should last a duration of time. Each company is different and has different strengths, challenges, and resources. While some companies may give their field teams one month to onboard four tools, others may give them three months to complete the first phase. Think about the complexity of the tools involved and your field teams' comfort with technology. The completion of each phase is a milestone to celebrate.

By writing down what success looks like for each phase, expectations are set before you begin your onboarding process. Write it down now and highlight where you were successful or need improvement later in the phase. We've listed a few examples of success statements for you here:

+ We are successfully accessing drawings, specs, documents and specific company forms on our mobile devices.
+ We are logging our installation QA/QC via checklists and digitally documenting what's keeping us from moving forward.
+ We are documenting and keeping up with out-of-scope work by tracking it via Procore.
+ We have officially moved our time tracking into Procore.

Procore phased rollout chart.

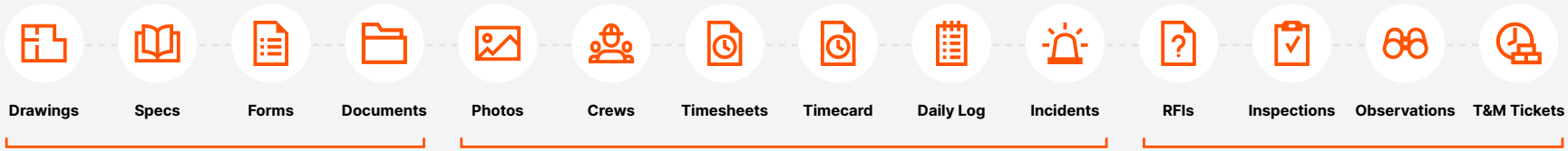
This chart is what your field team members will reference when they begin their training. Reference the peer-recommended paths here for inspiration. Regardless of whether or not you have all of the tools listed within the recommended paths, you can use these paths for inspiration and leverage your Procore Implementation Manager for advice.

Not everyone buys all the Procore tools within the first year, so we left a space for you to highlight tools you are interested in for the future. Listing these tools can act as a carrot, motivating field team adoption, as well as giving your Procore Customer Success manager insight into assets, webinars, or case studies that may be helpful for the future.

List the order in which you would like your team to view the training. In the example below, the path indicates that you should access the Drawings tool training first, followed by Specs, then Forms, then Documents.

Which projects will we begin to run on Procore?

Whether you plan on rolling Procore out to all projects at once, or to a select few at first, utilize this area of the guide to clearly mark which projects will be using Procore and which projects will not.





Every day starts and ends with your Daily Log.

Mark which logs within the Daily Log you want to ensure your field team members are filling out. We've identified which logs most companies consider as their priorities and have listed additional logs to consider. *If you do not have or do not plan to use this tool, delete this page from your guide.

How will we log time in Procore?

Leverage this page to create clarity around how you plan to log time. Which tools will your teams leverage? Who will be involved? Will you be creating any additional 'types' of time-keeping logs? *If you do not plan to log time in Procore, delete this page from your guide.

Logging your time or your crew's time in the "Timesheets" tool.

This graphic shows the user interface of this tool. Your field team should print this out and take notes on this page while they watch the short training video. *If you do not have or do not plan to use this tool, delete this page from your guide.

Navigating the Daily Log.

This graphic shows the user interface of this tool. Your field team should print this out and take notes on this page while they watch the short training video. *If you do not have or do not plan to use this tool, delete this page from your guide.

Create a "Crew" or "Worker" to log time.

This graphic shows the user interface of this tool. Your field team should print this out and take notes on this page while they watch the short training video. *If you do not have or do not plan to use this tool, delete this page from your guide.

Logging your time in the "My Time" tool.

This graphic shows the user interface of this tool. Your field team should print this out and take notes on this page while they watch the short training video. *If you do not have or do not plan to use this tool, delete this page from your guide.

Which Observations will we be logging?

Use this sheet to create clarity around which Observation Types you'd like to log and keep track of. We've listed a few that we recommend and have left space for you to create some unique to your business needs.

What information is important to capture (within the Observations tool)?

while others you can make 'required', 'optional', or hide all together. We suggest hiding all fields you do not intend on using to cut down on the noise and simplify the experience for your field teams. Watch this on-demand training to help navigate how to do this across your tools.

Navigating Observations.

This graphic shows the user interface of this tool. Your field team should print this out and take notes on this page while they watch the short training video. *If you do not have or do not plan to use this tool, delete this page from your guide.



Which Tasks will we be logging?

The Tasks tool gives Project Management, and field teams the ability to assign and track project items for both internal and external team collaborators. For example; the project manager could assign the BIM detailer a Task to publish the coordinated model for the first floor. *If you do not have or do not plan to use this tool, delete this page from your guide.

Navigating the Tasks tool.

This graphic shows the user interface of this tool. Your field team should print this out and take notes on this page while they watch the short training video. *If you do not have or do not plan to use this tool, delete this page from your guide.

How will we be using the Punch List tool?

While the Punch List is typically used at the end of the project, it can also be leveraged by internal teams as a pre-punch list to minimize the number of punch items identified at the end of a project. By using the Punch List as a pre-punch tool, project teams can initiate a 'zero' punch policy and provide a higher-quality product than the competition.

Procore has provided you with templates to enable your field teams to capture information quickly and in a standardized format, optimizing reporting capabilities. Check out all the templates here and identify which templates your field teams should use. Dependent on your trade or focus, you may want to only select a few a delete the rest.

What information is important to capture (within the Punch List tool)?

Many of the Procore tools have configurable fields. Some fields mandatory fields, while others you can make 'required', 'optional', or hide all together. We suggest hiding all fields you do not intend on using to cut down on the noise and simplify the experience for your field teams. Watch this on-demand training to help navigate how to do this across your tools.

Navigating the Punch List tool.

This graphic shows the user interface of this tool. Your field team should print this out and take notes on this page while they watch the short training video. *If you do not have or do not plan to use this tool, delete this page from your guide.



What information is important to capture (within the RFI tool)?

Many of the Procore tools have configurable fields. Some fields mandatory fields, while others you can make 'required', 'optional', or hide all together. We suggest hiding all fields you do not intend on using to cut down on the noise and simplify the experience for your field teams. Watch this on-demand training to help navigate how to do this across your tools.

Navigating the RFI tool.

This graphic shows the user interface of this tool. Your field team should print this out and take notes on this page while they watch the short training video. *If you do not have or do not plan to use this tool, delete this page from your guide.

Access checklists within the Inspections tool.

Checklists are a great way to document, track, and manage your QA/QC or safety program. Out-of-the-box Procore provides a few templates you may find useful. You can edit these templates to best suit your business. Outline other templates you will add at the company level, so that your teams can access them on each project. *If you do not have or do not plan to use this tool, delete this page from your guide.

Navigating the Inspections tool.

This graphic shows the user interface of this tool. Your field team should print this out and take notes on this page while they watch the short training video. *If you do not have or do not plan to use this tool, delete this page from your guide.

Forms we've added.

Give your field team access to any paper form, digitally. If you have any specific documents that have a special format and can't be added to the Inspections tool, add them to the Forms tool. This tool enables your teams to fill out fillable PDFs in the field. Permits, Job Hazard Analysis, and Tool Box Talks are just a few that come to mind.

List out which forms your teams should now access through Procore here.
*If you do not have or do not plan to use this tool, delete this page from your guide.

Navigating the Forms tool.

This graphic shows the user interface of this tool. Your field team should print this out and take notes on this page while they watch the short training video.
*If you do not have or do not plan to use this tool, delete this page from your guide.

Team Leads to lean on.

Selecting a Procore Admin or Procore Committee to help you during iImplementation and oOnboarding is essential to the success of your investment. We recommend having a field- focused person for people to turn to. Someone that speaks their language and understands what they are trying to accomplish on a day-to-day basis.

When filling out "What you should go to them for," you'll want to clarify the type of questions this person can answer—IT questions, Procore questions, process questions, etc.

Additional Details.

These small but mighty details have been highlighted as hurdles that field teams brought up during onboarding. Your peers recommend making sure that these items are talked about prior to rolling out Procore.



Produced by
PROCORE TECHNOLOGIES, INC.

Procore manages your projects, resources and financials from project planning to closeout. Our platform connects every project contributor to solutions we've built specifically for this industry—for the owner, for the GC, and for the specialty contractor. Our App Marketplace has over 150 partner solutions that integrate seamlessly with our platform, giving you the freedom to connect with what works best for you, even if we don't build it. The ability to easily communicate across disparate teams makes it easier to work together by eliminating silos and establishing a single source of truth. It's how Procore gives your team access to everything they need to know to get their job done.

If you have any questions, email us at:
support@procore.com

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