

# THE DIGITAL LANDSCAPE FOR SMEs IN THE CONSTRUCTION INDUSTRY



# CONTENT.

2



Introduction

Why should I invest in Digital?

The Digital Landscape

Digital Maturity - Starting Out

Digital Maturity - Embracing

Digital Maturity - Innovating

FAQ's

Directory

3

4

6

7

8

9

10

16



# INTRODUCTION.

3



Welcome to this guide to the Digital Landscape for SMEs in the construction industry.

The guide gives you a high level overview of what technology is out there to support how you run your business - both specific to construction and more general business related needs.

There are three different digital maturity levels, Starting, Embracing and Innovating. We will take a look at each one to help you breakdown the vast amount of technology out there. You can navigate to specific pages to see a level you identify with, or skip between these levels to pick and choose depending on what is important to you or where you are with your individual journey.

Some commonly asked questions are covered with detailed answers to support you to buy, implement and embed technology in your business, and how to use data.

The end of the guide gives you an A-Z listing of all vendors mentioned in the guide.



INTRO



# WHY SHOULD I INVEST IN DIGITAL FOR MY BUSINESS?

4



## The benefits of digital tools to support your business:

Digital shop front > a website and social media give you an online presence and allow you to showcase what you do and how well you do it to your customers.

- Customers can find you when they search the internet for their construction needs.
- Use your website to showcase the quality and range of your work with photos.
- Customers increasingly expect business to have a website, even just a basic one.

Professionalism > utilising digital tools to create and issue quotes & invoices or communicate with your customers gives you a professional edge.

- Electronic quotes and invoices is a quick way to up your game.
- You can find free templates online to get you started.
- If you do invest in software, you'll also be able to save time by converting quotes to invoices in one click.

WHY?



Reduce admin > use software to reduce the time you spend on admin tasks.

- Utilise apps to scan bills and receipts and upload them to storage for your accountant or direct to your accounting software.
- Manage people using time tracking software, or fully functioning HR software.
- You can see real time savings by going digital which you can invest back into the business or find a better work life balance.

# WHY?

Increase turnover > software can help you manage your work so you can do more.

- Increase the number of projects you work on by using project management software and scheduling applications
- Use a CRM tool to track leads so you always have a pipeline of work

Increase profit > digital tools can make you more efficient, help you see what jobs you do are most profitable and help reduce costs.

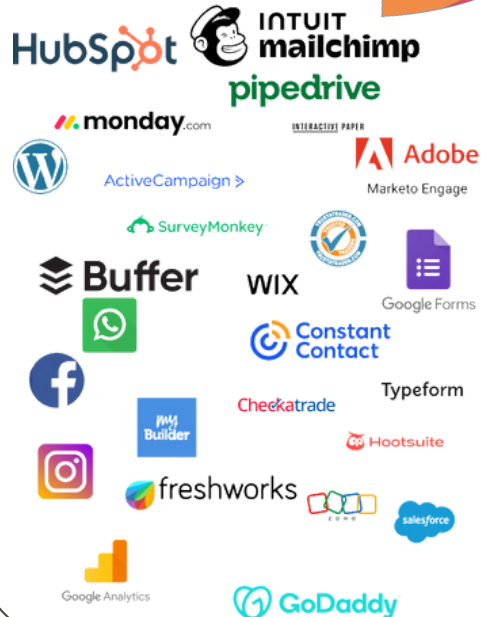
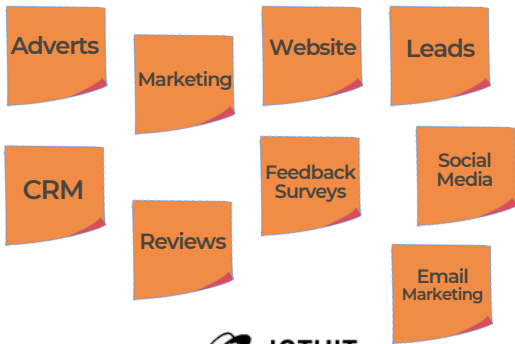
- Use software to reduce outsourcing costs – e.g. run payroll yourself
- Quote more accurately for both time and materials using estimating software & project management tools to see how much money and time it really takes you to deliver jobs
- Capitalise on the professional look of your business and charge what you are worth
- Understand which of your jobs is most profitable and focus bidding on this work



# THE DIGITAL LANDSCAPE

## Deliver Construction Jobs

### Find and keep customers and win work

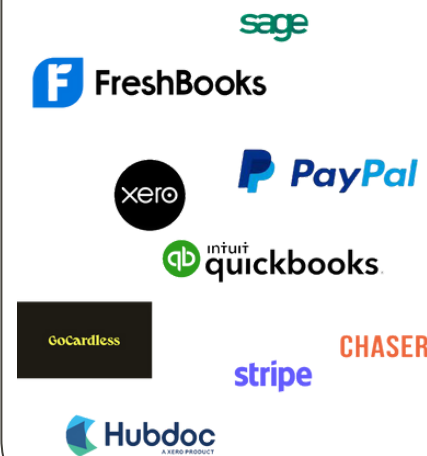


### Deliver construction jobs

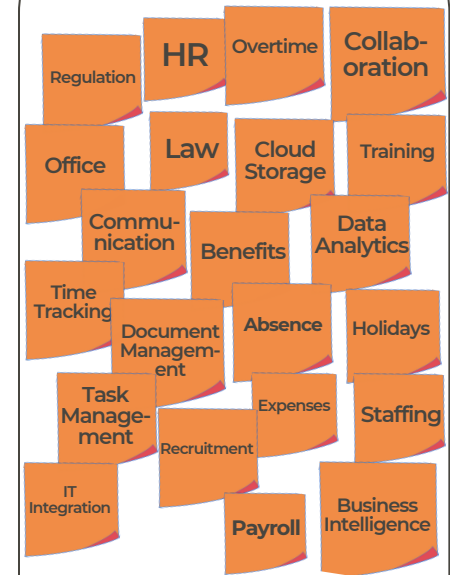


## Manage my Business

### Money



### People & Admin



**Just Starting Out?**  
[Click Here](#)

**Already on your journey?**  
[Click Here](#)

**Ready To Innovate?**  
[Click Here](#)

# Start here if you are just beginning your digital journey

## You might:

- Not have any digital tools or have a few little bits here and there.
- Have little confidence in how to buy and use digital tools.
- Have a workforce who are not confident using technology.
- Not use data, or really understand what it can do for you.

## Your aim is to:

- Spend less time on admin.
- Have insights into key parts of the business.
- Use tech to grow your business.
- Grow your confidence and experience.



### Deliver Construction Jobs

#### Find and keep customers and win work



#### Deliver construction jobs



### Manage my Business

#### Money



#### People & Admin



Some digital tools will fulfil multiple areas of your business and you'll only need to learn how to use one!

If you have an accountant, do they have a finance tool that they recommend?

Use in built reporting to start to understand key data such as profit and loss.

As you add paid for software to your business, make sure you factor in your increased running costs into your quotes.



# Start here if you want to get the most from digital tools for your business

## You might:

- Have been on the digital journey a while.
- Already have digital tools but they are not connected.
- Already use some data.
- Have a somewhat confident workforce.
- Have a digital landscape which has grown organically over time.

## Your aim is to:

- Connect tools to each other so you get the most from them.
- See data from across your business.
- Use data to make business decisions.
- Have digital tools to support the majority of your business.
- Be confident and experienced with digital tools.

8



### Deliver Construction Jobs

#### Find and keep customers and win work



#### Deliver construction jobs



### Manage my Business

#### Money



#### People & Admin



Connect your existing tools through built in integrations.

Expand your digital footprint so your business uses digital tools wherever it can.

Utilise features of existing tools.

As your workforce gain confidence, consider using apps for them to enter their own timesheets or complete tasks.

Use basic data analytics to see more of your data.





# Start here if you want to do something different with digital tools

## You might:

- Already have lots of connected technology.
- Already collect data and act on it.
- Be confident choosing, using and developing digital tools.
- Have a tech confident workforce.

## Your aim is to:

- leverage digital tools to stand out in your market.
- Innovate.
- Embrace emerging technology.
- Use tech to stand out and as a differentiator for you in your market.
- Use digital tools to grow, expand or diversify your business.

9



### Deliver Construction Jobs

#### Find and keep customers and win work

Marketing

HubSpot

Adobe

Marketo Engage

INTERACTIVE PAPER

ActiveCampaign >

Google Analytics

Social Media

Buffer

Hootsuite

#### Deliver construction jobs

BIM

BIMvision

Revit

BIMcollab

BLUEBEAM

GRAPHISOFT BIMx

unity

Virtual Reality

Walk-throughs

Augmented Reality

IRISVR

Matterport

3D Models

Drones

DroneDeploy

dronedirect

PIX4D

### Manage my Business

#### Money

VAT

Invoicing

Costs

Profit/Loss

Accounts

Margin

Self Assessment

Banking

sage

Tax

Getting Paid

GoCardless

CHASER

stripe

Hubdoc

PayPal

#### People & Admin

Document Management

e-Builder

EGNYTE

PROCORE

Business Intelligence

Data Analytics

Tableau

from Salesforce

Add digital tools to take your current work to the next level - using virtual and augmented reality to show a customer what the finished product will look like.

Use digital tools to expand your service offering or reach new customers.

Make it easier for customers to pay or chase outstanding invoices.

Use data analytics and business intelligence tools to manage all your data.



# HOW DO I BUY SOFTWARE FOR MY BUSINESS?

10



- **Knowing exactly what you need it for (your use case) is key - this will help make sure the tech is right for you, and keep you on track with any sales team so you can make sure you aren't buying functionality you won't use.**
  - Identify and understand your business processes you want the software to support.
  - Think about who will use the new software, and where it will be used (on-site?)
    - if you will use the software on-site, do you have suitable hardware (phone/tablet), does the software have a mobile app? Do you have a data plan?
  - Consider your business aspirations - how big do you want to grow? What does the software need to do in the future?
    - how easy to scale is the software? Will it grow with your business?
  - What data will you want to see now, or in the future? (See "Why do I need data and how do I use it?")
  - What other software do you have now, or plan to have in the future? Will you want all your software to integrate?
  - What hardware do you use - iOS, Android, Windows, Mac? Some software isn't compatible with everything.

- Make a list of everything you need the software to do based on the above - which ones are the deal breakers? Which ones are you prepared to compromise on?
- Use the list as a checklist as review the options on the market and narrow them down.
- Narrow down your search by using review sites and see what users think of the products.
- Social media advice groups for trades can be a good place to ask for opinions of what software businesses use - or don't use!
- You can often find free trials or introductory offers, or some software will have a free version for limited functionality or users, so you can test it out and make sure it works for you.
- Vendors may give demo's, so you can see the key features you need in action, and ask questions, including:
  - Is your software GDPR compliant?
  - When is support available and how do I access it?
  - Have you had any downtime recently?
- Cost of software is usually dependent on the number of users, so factor in the cost change if you grow your team
- You can sometimes save by paying for a year's subscription up front, or just pay monthly, spreading the cost.
- Software technology is mostly cloud based, so you subscribe to the service. Some will still need to be installed onto your own hardware though (see "How do I implement and manage software").

# HOW DO I IMPLEMENT AND MANAGE SOFTWARE?

11



- **How do I implement the software?**

- You don't need to use all the features of your software at once - gradually introduce the areas you need the most - so if you have accounting software that also does payroll, get comfortable with one before doing the other (see "How do I successfully embed technology in my business?").
- If your software is cloud based, then implementation is minimal as you generally access it through a web browser or an app.
- The provider will upgrade the features and ensure it's secure for you too.
- Some cloud software might still need you to download an interface to a laptop or a computer.
- If you do buy software that is NOT cloud based, then you'll need to make sure you have the correct hardware, which the provider will list for you, including:
  - Storage space - you need to be able to download and save it, so you need enough room on your hard drive.
  - Memory or RAM - this affects the speed your computer works at, not enough and it will be very slow to respond, or may not even run some software at all.

IMPLE  
MENT



- **When do I implement the software?**

- Software relating to people or money (like accounting or payroll) you might want to align using it with a new tax year, so it's easier to report to HMRC the end of the following year.
- Avoid peak business periods for setting up your new software.
- Plan out the roll-out to make sure that you are comfortable with how long it will take - remember to include time to experiment with your set up and re-configure to get it working just right for you.

# IMPLEMENT



- **How do I manage the software?**

- Make sure you get notifications about new versions with upgrades or more importantly security fixes, and make sure you apply these quickly - it will usually just be a couple of clicks.
- You might need to make backups of your data, so you don't lose any of your information. Look into extra storage, either in a separate hard drive or in a Cloud storage solution.
- If you face problems, get support from the vendor. Often other users have the same questions/issues, so you may find answers on support forums or get direct support.
- Utilise any training available, a lot of common training can be found on YouTube, alongside other users videos.

- **What about the future?**

- You might outgrow the tool and want to upgrade so you'll want to understand how to get your data out - for example all your previous years accounts from finance software.
- This is usually done using some standard methods - most commonly exporting data via "csv files".



# HOW DO I SUCCESSFULLY EMBED TECHNOLOGY IN MY BUSINESS?

13



It can be challenging to introduce technology whilst also working in your business, finding the headspace to do it all properly. If you have a team, or sub-contractors using your digital tools, that can be harder still.

## Just you?

- plan out how you are going to use the tech:
  - Which features first, then second?
  - When will you start to use each of the features?
  - If you want to integrate with other tools in your business, when should that happen?
  - Data and reporting, if relevant - when do you want to start seeing data and using reports?
- Gradually use features of your new software, based on what you need it for most.
- This method will see you grow in confidence as a user, understand how to access vendor support, and start seeing immediate benefit with a minimal impact on your time.
- Once you see the efficiency or time benefit of going digital, that will be the time needed to adopt the next part of the tool
- If you find, after real-life use, it's actually not for you, you haven't invested too much time or tied too many of your business processes to something that needs to be changed



EMBED



## You have a team of users?

- **Communication is key**
  - Explain what benefits they will see from going digital.
  - You might want to get your teams involved in the selection process - Proposing features they would find useful.
  - Give them plenty of notice that you are changing things.
  - Different people react differently to change and some will need time to become comfortable.
  - Take onboard any concerns and consider whether they can be addressed.
  - Do they need training - what support does the vendor have - training videos, or demos tailored to users.
- Get confident yourself with the new tech before introducing it wider, and gradually introduce new features to the team.
- Do you have an engaged or tech-minded team member that you could use as an early-adopter and tester?



# WHY DO I NEED DATA AND HOW DO I USE IT?

15



Data is information about your business - how many quotes you provide, how many jobs you do, how long they take, how many invoices you issue, what your costs are, what your income is...

- The more digital tools you introduce to your business, the more data you are automatically collecting about your business, without you having to do any additional steps.
- A lot of tools will include pre-built reports, which will summarise the data by dates and by categories, or they might provide dashboards.
- If you are new to this, focus on the out-of-the-box reports about the most important things to you.
  - How much is your income versus costs, your profit margin?
  - How many quotes convert to jobs?
  - How accurate are your quotes?
  - How many customers do you have?
  - How many of your customers are repeat business?

Once you are more comfortable with your data:

- You might want to create your own reports within the software itself, based on the exact information you want to see.
  - Tools often have the ability to amend existing reports or build your own using a wizard.
  - Get vendor support and post on software forums to ask for reports that give you the information you need without needing to build it if you don't feel confident.
- You might want to collate data out of each of your tools, and see a combined view using a data analytics tool.
  - This is more costly, in both time and money as you will be paying for additional software and you will need to learn how to use it.
  - You may be able to integrate your software with analytics tools, so your data will be pulled out directly, and you then build a report you want.
  - Without integration you can export data from your software and then upload into an analytics tool.

Once you have become comfortable with existing data, you might wish to expand your digital footprint to include tools designed to gather more data. For example, reaching out for feedback, issuing surveys or creating marketing campaigns to engage your customers. These will add additional cost and effort, so consider how much benefit you will get from them.

When you see data coming out of your day-to-day business, you'll have more information on which to base decisions about what you do next to grow or maintain your business.

DATA





## > **Access PeopleHR**

A cloud-based HR platform that helps UK businesses of all sizes streamline their HR processes, improve employee engagement and give their employees the ability to self-serve.

## > **ActiveCampaign**

Email marketing, marketing automation, and CRM tools

## > **Asana**

Asana is a leader in collaborative project management software for teams, no matter their size or locational distribution.

## > **Autodesk Build**

Seamlessly collaborate and deliver projects on time and on budget with construction project and site management software.

## > **AutodeskRevit**

BIM software to design and make anything. Design buildings and infrastructure in 3D. Build greener projects. Transform the world.

## > **BIM Vision**

BIMvision is a freeware IFC model viewer. It allows to view the virtual models coming from CAD systems

## > **BIMcollab**

Save time and drive model-based collaboration with BIMcollab: model validation integrated with issue management, connected to all popular BIM tools

## > **BIMx from Graphisoft**

Bridge the gap between the design studio, the client's office, and the construction site with award-winning BIMx, the most popular presentation and coordination app for desktops, mobile devices, and the internet.

## > **Bluebeam**

Revu® offers powerful, highly customisable document management, markup and automation tools with a built-in collaboration space, Studio.







## > **Bright HR**

Simplify your people management and compliance with our time-saving HR software and tools

## > **Buffer**

Buffer helps you build an audience organically. We're a values-driven company that provides affordable, intuitive marketing tools for ambitious people and teams.

## > **BuilderTrend**

Our residential construction management platform was built with you in mind. Each feature was carefully designed to help home builders, remodelers and specialty contractors manage projects from start to finish – all in one convenient place.

## > **Chaser**

The number one accounts receivables management software in the UK. Thousands of SMEs worldwide trust Chaser to automatically chase and collect late payments, track debtors and improve their working capital.

## > **CheckaTrade**

We'll introduce you to the millions of homeowners that are searching our website, or reading our printed directories every single month, looking for reputable tradespeople like you.

## > **ConstantContact**

Capture leads. Share updates. Drive traffic. We deliver everything you need to build deeper relationships with your most important audiences.

## > **Dext**

A software application that allows business owners, accountants and bookkeepers to electronically capture and store receipts, invoices and other supporting documents that a firm or business depends on to ensure they keep accurate and secure financial records

## > **DroneDeploy**

Automate site inspections, track construction projects and centralize visual data - all in one platform





## > **Drones Direct**

Professional drones can perform specific jobs quickly and safely. Whether they're improving infrastructure networks, responding to natural disasters or sampling water. They can even create 3D maps, monitor crops, capture live news or inspect solar panels.

## > **Dropbox**

Easy to use, reliable, private and secure. It's no wonder Dropbox is the choice for storing and sharing your most important files.

## > **e-Builder**

The Best Construction Management Software for High Performance. Making Construction Asset Management Easier

## > **Egnyte**

One trusted platform to secure and govern all your company's files, no matter where work happens.

## > **EZOfficeInventory**

Construction Equipment Tracking Software Try the best way to track and manage tools & equipment of all sizes across construction sites.

## > **Fieldwire**

The all-in-one tool for the jobsite. Fieldwire is the place where the entire project team — from each foreman to the project manager — comes together to collaborate and share information in real-time.

## > **FreshBooks**

Easy-to-Use Accounting & Bookkeeping Features

## > **Freshworks**

A powerful Sales CRM that helps you sell smarter and close deals faster

## > **GoCardless**

Collect one-off payments instantly with GoCardless. Direct from your customer's bank account to yours.





## > **GoDaddy**

GoDaddy offers more than just a platform to build your website, we offer everything you need to create an effective, memorable online presence

## > **Google Data Studio**

A unified advertising and analytics platform for smarter marketing and better results.

## > **GoogleDrive**

Store, share and collaborate on files and folders from your mobile device, tablet or computer

## > **GoogleForms**

Easily create and share online forms and surveys, and analyze responses in real-time.

## > **GoogleWorkspace**

How teams of all sizes connect, create and collaborate

## > **HBXL Building software**

Straightforward estimating, drawing, health & safety, legal contracts and job management software tools for your residential building firm.

## > **Hootsuite**

Our suite of social media tools is built to help you save you time, grow your following, and drive results on social media.

## > **HubDoc**

All your bills and receipts in one place. With Hubdoc, you can import all your financial documents & export them into data you can use.

## > **HubSpot**

Marketing software that helps you drive revenue, save time and resources, and measure and optimize your investments — all on one easy-to-use platform.

## > **InteractivePaper**

Marketing made interactive. The immersive marketing experience that delivers results.





## > **IrisVR**

The #1 VR Platform for the Building Industry. Communicate your vision with greater clarity and gain the trust of clients. Make decisions with speed and confidence by experiencing a true to scale space. Run QA/QC to catch costly coordination issues.

## > **Jobber**

Construction software helps business owners schedule crews, track time and materials on the job, and communicate with customers—from anywhere.

## > **Mailchimp**

Take your email marketing to the next level. Deliver your next big campaign and drive sales in less time with Mailchimp.

## > **Marketo**

Adobe Marketo Engage is B2C and B2B marketing automation that also brings sales and marketing together so they can strategise and execute as one extra-hot team.

## > **Matterport**

Explore each job site from every angle. Save time, reduce site visits, and improve communication by adding Matterport to your AEC toolkit.

## > **Microsoft Power BI**

Power BI is a unified, scalable platform for self-service and enterprise business intelligence (BI). Connect to and visualise any data

## > **MicrosoftProject**

Everyone manages projects regardless of expertise. Project gives you the power and simplicity to take on any project successfully.

## > **MicrosoftTeams**

Get the all-in-one app that connects you with other people online. Meet, chat, and share content with anyone from anywhere in an easy and reliable way.

## > **Monday.com**

Plan, organize, and manage resources, activities, and daily functions across your teams and company to improve business efficiency. Manage and track your entire sales lifecycle with powerful features unique to monday sales CRM





## > **MyBuilder**

We help homeowners choose great builders and we help great builders succeed

## > **OneDrive**

Save your photos and files to OneDrive and access them from any device, anywhere.

## > **Paperless Construction**

Effortlessly Manage Training, Compliance, Time & Attendance with our Cloud-Based Construction Health & Safety Software

## > **PayPal**

Get paid fast when you send free professional, customisable invoices that make it easier for customers to pay. Or create estimates to bid for a job.

## > **Pipedrive**

An easy-to-use, effective sales tool that centralizes your data, helping you visualize your entire sales process and win more deals.

## > **Pix4D**

The online platform for ground and drone mapping, progress tracking, and site documentation

## > **PlanSwift**

PlanSwift is the fastest and easiest to use software for accurately completing construction takeoffs on your computer screen

## > **Procore**

Take control of construction outcomes, minimise risk and protect profits with Procore's top-rated construction management platform. Every product you need to plan and prep, build and operate construction on one platform.

## > **QuickBooks**

Save around 8 hours a month on managing your accounts with QuickBooks' all-in-one online accounting software.





## > **RedTeam**

Intuitive construction jobsite management software for efficient, real-time collaboration among field, office and trade workers, that reduces rework and miscommunication. Easy-to-use construction project management software, designed to simplify, automate and standardize tasks for contractors looking to save time and money.

## > **Rippling**

Rippling lets you easily manage your employees' payroll, benefits, expenses, devices, apps & more – in one place.

## > **Safetybank**

Prevent accidents and hazards on your construction site with intuitive management, auditing, and reporting – rolled into one, comprehensive health and safety software package.

## > **Sage**

An affordable business management solution for small and medium businesses in every industry. Manage accounts, suppliers, sales, and more with a scalable solution that's built to grow with your business. Get actionable insights to run your entire business effortlessly.

## > **Salesforce**

A small business CRM is a customer relationship management tool designed to support communication with customers and prospective customers at a price point, and with features, relevant to a smaller businesses.

## > **ServiceM8**

Smart job management for trades & services. Cut paperwork, get more jobs done & provide great service.

## > **Slack**

Slack makes communication easier so that your teams can stay organised, save time and get more done.

## > **Smartsheet**

Streamline all phases of the construction project lifecycle so your team can deliver projects on time and on budget with Smartsheet.





## > **Square**

Invoicing software built to save time and get you paid faster.

## > **STACK**

STACK delivers power and performance from measurements to proposals. Work through takeoffs and estimates faster and with unmatched accuracy, and leverage intuitive tools to bid better and win more profitable work

## > **Stripe**

Stripe Invoicing is a global invoicing software platform built to save you time and get you paid faster. Create an invoice and send it to your customers in minutes. Our advanced features and Invoicing API make it easy to automate accounts receivable, collect payments, and reconcile transactions.

## > **SurveyMonkey**

Build and customise your own high-quality surveys and forms in minutes

## > **Tableau**

Tableau helps people see and understand data. Our visual analytics platform is transforming the way people use data to solve problems

## > **Tradify**

Job Management Software for UK Tradespeople. Cloud-based software to help you quote, schedule, manage jobs, and issue invoices faster than ever before. The all-in-one software for construction projects

## > **Trello**

Trello brings all your tasks, teammates, and tools together. Keep everything in the same place—even if your team isn't.

## > **Trimble MEP**

One Source for Building Services Product Information. Access the largest online product information centre for mechanical, electrical, and plumbing sectors in the UK. LuckinsLive.com has accurate, comprehensive and up-to-date information on hundreds of thousands of products."





## > **TrustATrader**

Build your business together with a valuable reputation by applying for an exclusive membership of TrustATrader. Be rewarded for your high standards of work with a regular demand for your services.

## > **Typeform**

Typeform makes collecting and sharing information comfortable and conversational. It's a web-based platform you can use to create anything from surveys to apps, without needing to write a single line of code.

## > **Unity3D**

Unity's real-time 3D technology enables you to connect BIM data, stakeholders, and every phase of the AECO lifecycle in one immersive, collaborative platform

## > **Viewpoint**

Our award-winning document and drawing management solution and construction field application help you deliver projects on-time and on-budget.

## > **Wix**

Create a website without limits

## > **WordPress**

Build and grow your website with the best way to WordPress. Lightning-fast hosting, intuitive, flexible editing, and everything you need to grow your site and audience, baked right in.

## > **Work Wallet**

Keep your construction sites safe and operational using the Work Wallet Construction Health and Safety Software, trusted by thousands of workers in the UK and Worldwide.







## > **Xero**

With Xero's construction accounting software, you can send quotes, create invoices, track expenses and manage jobs from the mobile app. Make your days easier with accounting software for builders.

## > **Zapier**

Build automated workflows customized for your role and business. Reliable automation that moves you forward. Securely automate processes across departments—increasing your company's productivity, efficiency, growth, and ROI

## > **ZohoCRM**

Engage with your customers through the right channel at the right time and with the right message. With Zoho CRM you can harness the power of omni-channel presence, segmentation, KPIs, predictive intelligence, and more to deliver personalized experiences that breed customer loyalty.

## > **Zoom**

Make meaningful connections with a unified solution for meetings, team chat, whiteboard, phone, and more



