

Define a Procore Rollout Strategy

Background

During the Rollout phase of your Procore Implementation, your internal implementation/training team should get together to discuss how you're going to successfully rollout Procore going forward.

Things to Consider

To help define your Procore rollout strategy, you should take the following items into consideration.

- **Who are members of your internal Procore Committee?**
It's important to identify the few individuals who will become the in-house Procore experts within your organization. They will serve as a valuable training/support resource, as well as provide insightful guidance when defining your company's best practices.
 - **How will you successfully onboard new members and train them on how to properly use Procore?**
When new employees are hired, how can you best streamline their onboarding process to ensure that they will be properly trained on how to use Procore YOUR way. Below is a list of resources that you can use to train both internal and external collaborators.
 - [Procore Certification \(https://learn.procore.com\)](https://learn.procore.com): Self-paced, role-based certification program
 - [Support Center \(https://support.procore.com\)](https://support.procore.com): Product user documentation (Tutorials, FAQs, etc.)
 - [Training Center](#): Custom, company-specific documentation that explains how to use Procore according to your best practices and SOPs.
 - **What are your Procore best practices?**
It's important to document your company-specific procedures in order to encourage consistent usage of Procore by all key stakeholders.
 - **Which projects will use Procore?**
For example, maybe you want all new projects to be managed in Procore. Typically, if a project has already started and is currently being managed with your previous construction management solution, it's not recommended to switch to Procore mid-project. However, if you do wish to switch mid-project, you should first discuss it with your Implementation Manager.
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Rollout Phases

Below are the most common Procore rollout strategies for our clients. Getting early buy-in from your project teams is integral for achieving company-wide adoption. Regardless of the chosen rollout strategy, it's important to identify the key person(s) who will serve as your internal Procore Implementation Manager for each office, division, or business unit. Please work closely with your Procore Implementation Manager for insight and guidance during this critical stage of the implementation process.

It is recommended that Procore is implemented using a “phased” approach as opposed to an “instant-on” approach. The



most common strategies for rollout are:

- **Office Rollout:** Roll out to corporate offices first then strategically to branch offices.
- **Business Unit/Market Sector Rollout:** Roll out by market sector (i.e. Commercial, Industrial, etc.)
- **Project Start Date:** Roll out projects chronologically as they come online.

Training Requirements for Rollout to New Project Teams

Procore should be rolled out to the defined groups or projects in a phased approach. Which generally looks like this (more details of each phase below):

- [Phase 1](#)
Approx. 2-3 weeks prior to required Procore usage, users are invited and added to a test project. At this same time, a separate email is sent to the users letting them know about Procore, and what is required of them for training.
- [Phase 2](#)
Approx. 1 week prior to required usage, 1 or multiple training sessions are scheduled and run by the internal implementation manager.
- [Phase 3](#)
Users then begin using the system, and internal implementation managers check in at regular intervals to see if there are questions and ensure users are utilizing the system as intended.

Phase 1

Before a new project team is brought online, employees should complete Procore's role-based certifications, attend weekly training webinars, and be given access to the sand box test project. Details below:

- **Sandbox Test Project** - Invite all new employees to the sandbox test project. This test project provides an area to practice and review the material that is covered in the Procore Certification Program.
- [Procore Certification](#) - Procore offers both foundational and role-based training courses to teach new users the basics of the system. All courses are self-paced and consist of tool-specific training videos and quizzes.

Two weeks prior to project start date:

Add users to the Project Directory and invite them to Procore. At the same time, separately send them this email, editing the content to take into account the training that you require of them.

Hello [ROLE],

I am excited to announce that our organization recently purchased Procore software as a tool to enhance and streamline our project management efforts. This decision is a culmination of months of research by select project team members to identify the best project management solution on the market.

The next step is to get all of our project teams to use the system. To begin this process, you'll receive an invitation email with the subject line "Welcome to Procore" which will allow you to setup your user ROLE and



password to access our Procore account. Once received, please complete the training requirements outlined in the article.

We will be having a training meeting to go over all of the features and responsibilities on [insert date]. Prior to that meeting, please complete the following:

Procore Certification

Training Webinars [dictate which ones you require]

Thank you in advance for embracing this tool and for all your efforts as we continue to strive for excellence in all that we do.

Phase 2

Once the above items are completed, your organization's implementation team should work with new project teams to get the initial project(s) online and invite users to their actual projects if they have not already been. Implementation Project Managers should conduct training sessions with your project teams to ensure complete adoption of the system. We recommend building out a project training schedule as outlined below:

- **User Permissions and Project Creation**
 - Review permissions for each project role
 - Discuss the project creation process
- **Plan Management**
 - Review the drawing upload process and as-built functionality
 - Review the specification upload process and revision management
- **Budget and Commitment Management**
 - Review the budget upload process
 - Demonstrate the buyout process
- **Change Management**
 - Review the workflow and process creation for Change Events, RFQs, and Change Orders
- **Collaboration and Mobile Tools**
 - Review the workflow and process creation for RFIs and Submittals
 - Highlight mobile capability for field team members
 - Managing Daily Logs
 - Quality management
 - Progress photos

Phase 3

Once the users have gone through a session where your organization's specific requirements have been laid out, and



they have a solid understanding of the system and what is required of them – they can begin using the system.

[Continued Education for Procore](#)

