**Expanded Plan for Execution – Build IQ**

**1. Purpose and Value Proposition**

* **Primary Goal:** Allow GCs, subcontractors, and small construction businesses to quickly and accurately estimate rental equipment costs for their bids.
* **Value:** Saves time, reduces manual work, increases bid accuracy, and creates a direct pipeline of leads for rental companies.

**2. Core Features (Expanded)**

| **Feature** | **Details** |
| --- | --- |
| **Project Information Input** | Users enter project type, location, duration, size, equipment needs, and optional notes. AI assists with pre-filled suggestions based on project type. |
| **AI-generated Equipment List & Costs** | Based on inputs, AI generates a recommended equipment list (excavators, lifts, generators, etc.) with average rental prices from local/national vendors. |
| **Bid Template Generation** | AI formats the equipment estimate into a professional bid-ready document including equipment descriptions, costs, and optional markups. |
| **Save, Duplicate, Edit** | Users can create versions of estimates for multiple projects or revisions for the same project. |
| **Print & Share** | Easy exporting to PDF or direct email to clients/stakeholders. |
| **Lead Generation for Rental Companies** | With user consent, project data (location, type, equipment list) becomes a lead for participating rental companies, which can provide competitive quotes. |
| **Rental Company Marketplace (Optional Add-On Later)** | Users could also request live quotes from rental companies directly within the platform. |

**3. Execution Steps**

| **Phase** | **Actions** |
| --- | --- |
| **Discovery & Research** | Interviews with GCs, subcontractors, and equipment rental companies to confirm pain points, pricing needs, and bid process. |
| **Data Collection** | Gather rental cost data for all common equipment across regions. Use existing databases or partnerships with rental companies. |
| **AI Model Training** | Train AI on bid templates, equipment lists by project type, historical rental pricing, and regional pricing variations. AI should also learn from user inputs over time. |
| **UI/UX Design** | Design simple form interface for users, intuitive estimate page, and customizable bid template with branding options (logos, footers, terms). |
| **Lead Capture Integration** | Build backend that tags each estimate with project details, automatically populating lead database for rental companies. |
| **Beta Launch** | Soft launch to a pilot group of small GCs and contractors for feedback. |
| **Rental Partner Outreach** | Offer lead subscriptions to equipment rental companies for targeted access to projects in their service area. |

**4. What Users Should See**

| **Step** | **User Experience** |
| --- | --- |
| **Homepage/Intro** | Clear value statement: “Create Professional Equipment Rental Bids in Minutes.” Option to Start New Estimate or View Saved Estimates. |
| **Project Input Form** | Simple fields (project name, type, size, location, duration). Drop-downs with common selections (commercial build, site prep, road work, etc.). |
| **Equipment List & Costs** | AI-generated list with equipment type, description, average rental cost (daily, weekly, monthly), optional recommendations (e.g., safety gear). |
| **Bid Template Preview** | Professional layout with customizable branding, easy text editing, space for terms, and automatic cost totals. |
| **Save & Manage Estimates** | Dashboard with saved estimates, status (draft, submitted), and ability to duplicate/edit. |
| **Share/Export** | Buttons to export to PDF, email directly, or generate shareable link. |
| **Lead Confirmation (for Users)** | Clear notice explaining that anonymized project data may be shared with rental companies for better pricing offers. Option to opt out. |
| **Lead Portal (for Rental Companies)** | Secure dashboard where companies can see relevant leads and respond with offers (if marketplace feature is enabled). |

**6. Competitor Research - Similar Tools**

| **Company** | **Tool** | **Notes** |
| --- | --- | --- |
| **BigRentz** | Online Equipment Rental Marketplace | Offers equipment rental price comparisons but lacks dedicated bid creation. |
| **RentalYard** | Rental Listings & Quotes | Focuses on connecting renters to equipment but doesn’t offer tailored bid templates. |
| **Procore** | Construction Management Software | Procore offers bidding tools, but equipment cost estimation is not its core focus. |
| **BuildingConnected (Autodesk)** | Bid Management | Focuses on connecting GCs with subcontractors but lacks rental-specific cost estimating. |
| **PlanHub** | Construction Bidding Platform | Covers bid management, including some cost estimating, but focuses more on connecting GCs and subs. |
| **ToolFleet (smaller player)** | Equipment Tracking & Rental Costs | Focuses on equipment management but doesn’t offer AI-powered bid generation. |

**User Flow (Wireframe-Style Outline)**

**1. Landing Page / Homepage**

**Headline:**  
*"Create Accurate Equipment Rental Bids in Minutes with AI."*

**Subhead:**  
*"Save time, win more bids, and get competitive pricing for every project."*

**Main CTA:**  
[Start Estimate]  
[Explore Features]

**Secondary Info (for Rentals Partners):**  
*"Rental companies: Get real-time leads from active projects."*  
[Join as Equipment Partner]

**2. Project Info Input (Step 1 of 3)**

* Project Name
* Project Location (Zip or City/State)
* Project Type (Dropdown: Site Prep, Commercial Build, Road Work, etc.)
* Project Size (Square Footage, Acres, or Linear Feet if roadway)
* Duration (Start Date, End Date)

[Next]

**3. Equipment Needs (Step 2 of 3)**

**Smart Recommendations Based on Project Type:**

* Pre-filled list of common equipment (excavators, lifts, generators, light towers, safety gear, etc.)
* Users can add or remove from list
* AI can suggest items they may forget (e.g., safety barriers for road work)

**For each equipment type:**

* Recommended quantity
* Average daily/weekly/monthly cost (regional data-driven)
* Option for user to adjust or enter their own known rates

[Next]

**4. Estimate Review & Bid Creation (Step 3 of 3)**

* Clean, professional bid preview (like an invoice but tailored for equipment bids)
* Fields:
  + Project Info (auto-filled)
  + Equipment List + Costs
  + User’s Logo (upload option)
  + Terms & Conditions (template provided or custom field)
  + Optional Markup %
* Options:  
  [Download PDF] [Email Directly] [Save & Edit Later] [Duplicate for Similar Project]

**5. Dashboard (For Returning Users)**

* Saved Estimates (Draft, Submitted, Won, Lost)
* Quick Actions (Duplicate, Edit, Export, Delete)

**6. Lead Generation Confirmation**

* Pop-up: *“Want competitive quotes for this equipment? Allow rental companies in your region to see this project and send you direct pricing offers.”*  
  [Yes – Share My Project Info]  
  [No, Skip This]

**7. For Equipment Rental Companies (Separate Portal)**

* See filtered leads by location, project type, equipment need
* Option to submit a quote directly through portal
* Dashboard of pending/won/lost leads

**Build IQ - User Experience Design**

**Target User**

* General Contractors (GCs)
* Subcontractors (Earthworks, Demolition, Site Prep, etc.)
* Small construction companies bidding for work (often on tight deadlines)
* Office Admins/Estimators who prepare bids for field teams

**Design Principles**

* **No fluff:** Construction pros don’t want jargon — keep it straight to the point.
* **Speed:** The faster they can complete a bid, the more valuable the tool.
* **Flexibility:** Allow them to customize bids (some are formal, others are quick quotes).
* **Mobile-First Friendly:** Many will use this from job sites, not just desks.
* **Trust Signals:** Highlight AI accuracy and data sources (rental companies, regional data) to build credibility.

**User Flow: Screen-by-Screen**

**1. Landing Page (Web & Mobile)**

**Purpose:** Welcome, value prop, and immediate action.

**Headline:**  
*"Estimate Equipment Costs & Build Bids in Minutes"*

**Subhead:**  
*"Powered by AI + Real Rental Data"*

**CTA Buttons:**  
[Start Estimate]  
[See How It Works]

**Visual:**  
Hero image — split screen showing form on left, professional bid preview on right.

**Footer:**  
Trust signals — “Powered by [Data Partner], Trusted by 500+ Contractors.”

**2. Project Information (Step 1/3)**

**Purpose:** Gather core project data to customize equipment list and pricing.

**Fields:**

* Project Name
* Location (Zip Code / City Dropdown)
* Project Type (Dropdown: Site Prep, Commercial Build, Road Work, Demolition, etc.)
* Project Duration (Start Date / End Date)
* Optional Notes Field (for unique needs)

**Pre-filled suggestions:**  
If “Commercial Build” is selected, suggest common equipment automatically in Step 2.

**Progress Bar:**  
Step 1 of 3

**CTA:** [Next - Select Equipment]

**3. Equipment Needs (Step 2/3)**

**Purpose:** AI auto-suggests equipment; user confirms or edits.

**Design:**  
**Split screen:**

* Left side: Suggested Equipment List (editable)
* Right side: Cost Preview (running total in real-time)

**Each Item Row (Example):**  
[Excavator - 50,000 lbs]

* Qty: [ 2 ]
* Rental Duration: [ Weekly ]
* Cost per Week: [ $2,500 ] (editable)

**Smart Suggestions Pop-Up:**  
*"Projects like this also often need safety barriers & temporary power. Add these?"*

**Manual Add Button:** [+ Add Custom Equipment]

**Progress Bar:**  
Step 2 of 3

**CTA:** [Next - Create Bid]

**4. Bid Review & Customization (Step 3/3)**

**Purpose:** Finalize bid appearance & export.

**Sections:**

* **Project Info Block** (auto-filled)
* **Equipment Table:** Item, Qty, Duration, Cost
* **Subtotal + Optional Markup Field:** (%) (auto-calculates total)
* **Terms/Notes:** Pre-filled legal boilerplate (editable)
* **Add Logo:** [Upload Company Logo]

**Preview Area:** Live preview of final PDF/Doc layout.

**Export Options:**

* [Download PDF]
* [Email to Client]
* [Save Draft]
* [Duplicate for Similar Project]

**Lead Sharing Notice:**  
*"Want to receive competitive equipment quotes directly from trusted rental companies? Share this project anonymously."*

**Toggle:** [Yes] [No]

**5. Dashboard (For Saved Estimates)**

**Purpose:** Central hub to manage bids.

**Layout:**  
Table view:

| **Project Name** | **Status** | **Created Date** | **Actions** |
| --- | --- | --- | --- |
| Site Prep - Downtown | Draft | Mar 6 | [Edit] [Download] [Duplicate] [Delete] |
| Commercial Build - Orlando | Submitted | Mar 5 | [View] [Download] |

**Filters:**

* By Status (Draft, Submitted, Won, Lost)
* By Date Range

**CTA:** [+ New Estimate]

**6. Lead Portal (For Rental Companies)**

**(This is optional for Phase 1 but key if you want rental partners engaged)**

**Dashboard:**

| **Project Name** | **Location** | **Equipment Needed** | **Timeline** | **Submit Quote** |
| --- | --- | --- | --- | --- |
| Site Prep - Downtown | Orlando, FL | Excavator, Light Towers | Mar 12-20 | [Submit] |
| Road Work - I-4 | Tampa, FL | Traffic Barriers, Light Towers | Mar 15-Apr 1 | [Submit] |

**Quote Submission Form:**

* Equipment Pricing Table
* Delivery Details
* Contact Info