

Ten Office Workflows for Construction



When examining workflows in construction, it is vital to understand the office based workflows as they create the “sandbox” in which projects are built and the foundation for how field workflows function.

10 Office Workflows for Construction in 2016

1. Estimating & Takeoff
2. VDC (Virtual Design Construction)
3. ITB (Invitation To Bid)
4. Plan Management (Compare, Distribute, and Markup).
5. Scheduling (Planning and Tracking)
6. Project Management (RFI, PCO, CO)
7. ERP (Enterprise Resource Planning)
8. CRM (Customer Relationship Management)
9. Safety (Documents, Training, and Records)
10. Asset Management (Equipment, Tools, and Vehicles)

#1 Estimating & Takeoff: The process of reviewing a set of project plans, quantifying the scope of work involved, and calculating the price to complete the work. This is the first work flows from which all others flow from. The Takeoff process consists of reviewing a set of plans and counting the number of items or quantifying the area of material required to complete the work.

#2 Virtual Design and Construction (VDC): The process of managing 2D drawings and 3D models for the construction project. It is the more a holistic approach to the use of technology to solve issues, reduce risk and break down silos of information.

#3 Invitation to Bid (ITB): The process of soliciting and compiling project cost estimates from multiple contractors and producing a final project proposal to submit to a Project Owner. General Contractors use an online platform to upload, distribute and track the project plans.

#4 Scheduling: The process of developing a series of workflow events that follow in sequential order. This workflow has two streams: (I) General Contractor trying to coordinate multiple Subcontractors and (II) General Contractors or Subcontractors trying to coordinate their internal work.

#5 Plan Management: The process of managing the multiple revisions of plans generated for a project. This involves cataloguing, organizing and reviewing the individual sheets in every set of plans. General Contractors use an online platform to upload, distribute and track the project plans.

#6 Project Management: The process of managing Request for Information (RFI), Potential Change Orders (PCO), and Change Orders (CO) that are relate to the project documents.

#7 ERP (Enterprise Resource Planning): This process managing and integrating key office functions such as sales, planning, accounting and operations. These functions can operate independently, however a system that is fully integrated will allow a company to operate much more efficiently.

#8 CRM (Customer Relationship Management): The process of managing customer interaction, contact information, automate sales, automate marketing, and tracking vendor / customer partnerships.

#9 Safety Management: The process of managing the safety activities and documentation. This can cover items such as Employee new hire orientations, site safety meetings, and site safety inspections.

#10 Asset Management (Equipment, Tools, and vehicles): The process of managing tools, equipment, and tools on project sites. This can be completed through bar codes, tags and sensors. The goals is to have a complete inventory of all the company assets and know the current location and utilization.

