

# PlanGrid's Ultimate Standardization Checklist

Achieving a higher level of success on your project is attainable when you standardize it on PlanGrid. If you're just getting started, we've put together a checklist to help you quickly get your team up and running.

**Hardware rollout:** What platform (iOS, Android, Windows) will you deploy and who will manage the devices? Will your IT team implement Mobile Device Management (MDM) software to ensure security?

**Document control:** Is there a single dedicated owner for document control or will different project members be in charge of distinct parts? Which documents will be stored in PlanGrid and what will your folder structure look like? How will you track versions and who will be responsible for keeping the project up-to-date? How will you incorporate subcontractors and other team members?

**Team permissions:** Team permissions may change, but it's best to set up guidelines for usage early. Who will be your administrators? Who can publish their markups to the entire project team (who on your project team, subcontractors, etc.)? Who can upload or delete sheets and documents?

**Workspaces:** Workspaces allows users to have a separate place to access information that's most relevant to them, share sensitive information with only the right people and keep detailed records of work history. Will you use Workspaces to split up your project based on phase, area or trade?

**Issue tracking (Punchlists):** Who owns the punchlist? Will an architect create the first round and assign it to the GC? Who may close a punchlist item and what is the criteria for doing so? Will punchlists be tracked in workspaces or in the main parent project?

**Issue tracking (QA/QC):** Will subcontractors be able to track quality items in the GC-owned project? Will they maintain a separate project for internal teams? Will you use workspaces to track QA/QC?

**Submittals/specifications:** Will you use PlanGrid Submittals? If so, who are the user groups and what will that process look like? Will your team use the Automatic Submittals Log to assist in standardizing the submittals process?

**Shop drawings:** Will you upload shop drawings once approved by the Architect-Engineer? Will you use project tags and upload shop drawings in separate projects, in workspaces or as documents?

**Markup standardization:** Will you provide guidelines for markup colors and shapes? If using markup layers, will you standardize the names and types of layers? Which markups should be published to a project and which should remain private? Will you set a clear workflow for documenting as-built markups as you go?

**RFIs:** Will all RFI stakeholders log into PlanGrid to complete an RFI workflow, or will you use a different method?

**Project turnover:** How will you leverage PlanGrid during project turnover? What documentation will you provide to the owner? Will the owner have PlanGrid, or will you need to export the documentation from the platform?

## Additional Tips for Getting Started

### Start a Pilot Group

A strategy that we encourage project teams to consider is a small pilot group to test out the new strategies prior to rolling out to the project at large. This lets you work out kinks in a controlled fashion. A pilot will often include the General Contractor and one or two trusted key subcontractors.

### Pick Power Users

To get an internal support system started, pick a few excited users who are proficient with construction technology. Establish these key team members as the go-to resource for the rest of the team. This is a great opportunity to let younger employees trade technology expertise with those that are more experienced in the field.

### Create a Dashboard

Many customers create a central dashboard or bulletin board with mission-critical information as the first "sheet" in their projects. To ensure this digital bulletin board is leveraged, the jobsite crew is trained to start their day with a fully synced tablet. Here, you can hyperlink company documents, permits, safety manuals and more in a centralized location.

### Choose the Hardware

Ensure all necessary hardware is defined and available in advance of the implementation. Pairing this with a comprehensive training program sets new users up for success.

### Simple Turnovers

Have a clean turnover package full of data created by the General Contractor and subcontractors. This package will be provided to the building owner as an as-built export. The owner will be excited to have such a wealth of information about their facility. Moreover, if the owner is included in the standardization of PlanGrid, they can use the tool throughout the lifecycle of the building.