



For Contractors & Home Builders

# LOOKING AT CONSTRUCTION SOFTWARE?

Here are 15 questions to help you  
find the best construction  
software company.

## Contractors & Home Builders

# 15 questions to ask when evaluating construction software companies.

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- 1. Who at your company has a background in my specific industry or type of work?

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  - 2. Do you use your own software?

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  - 3. What is your setup or on-boarding process?

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  - 4. Is the software and data available from anywhere on any device?

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  - 5. How is my data protected?

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  - 6. Do you share or sell my data with anyone or any company outside of your organization?

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  - 7. If I choose to cancel, what is your cancellation policy?

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  - 8. What is your training policy?

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  - 9. What are your support policies?

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  - 10. During the on-boarding process, do you clean, dedupe, and scrub my data?

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  - 11. How often do you release major or minor enhancements?

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  - 12. How do you handle customizations?

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  - 13. How many years have you been in business?

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  - 14. How many customers do you have that are similar to us?

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  - 15. How do you charge for your services?

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## Q1. Who at your company has a background in my specific industry or type of work?

- Did they provide **names, credentials, and experiences** in your industry?

### Why does this question matter?

Do they really understand your challenges? At a minimum, this helps you create a connection to the company. A way to discuss issues that may or may not be software related.

More importantly, this is an indicator that they understand you. They understand your typical day and the challenges you face. With this understanding, they'll work harder on creating functional software. Software that's geared to be effective and solve the problems they experienced themselves.

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## Q2. Do you use your own software.

- Did they answer with a commanding **yes**?

### Why does this question matter?

For a company to really understand the user experience, they need to be a user. By their team using it daily, they'll be more proactive on addressing bug fixes and user experience issues.

Additionally, this shows the software they're recommending is powerful enough for their own use. If your software provider is an expert and they don't use their own software, what does that tell you about their own product offering?

### Q3. What is your set-up or on-boarding process?

- Did they provide a **structured, outlined, and documented** approach?

#### Why does this question matter?

The sooner you're on-boarded, the sooner you can experience a positive return-on-investment.

The team should be proactive on helping you get on-boarded and setup. If they're expecting you to do most of the work, this is an indicator that it'll be a slow set-up. Additionally, it's an indicator their training and support is not a top priority.

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### Q4. Is the software and data available from anywhere on any cellular-enabled device?

- Did they answer with a commanding **yes**?

#### Why does this question matter?

Contractors are rarely in their office. Most commonly, they're out driving between projects.

If the software is available anywhere, you'll be able to access and update your data between jobs. Not only will this increase your own detailed notes and data, but it will increase communication and collaboration between your team/co-workers.

## Q5. How is my data protected?

- Did they provide a **detailed and documented** approach to data protection?

### Why does this question matter?

Many software providers will collect sensitive information from you. Additionally, many will store your clients information too.

Be prepared to ask your software provider how they protect your data against hackers. What would happen in the event of a system failure. How often your data is backed-up and where it's placed.

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## Q6. Do you share or sell our data with anyone or any company outside of your organization?

- Did they answer with a commanding **no**?

### Why does this question matter?

Unfortunately, sharing and selling data is more common than you think. However, each organization must explain how they'll use your data in their privacy policy and their terms of service.

With that being said, verify they have some sort of privacy policy and terms of services. This is something that is commonly offered on their website. If you feel uncertain about the answer you receive, you have every right to review these terms personally or have them walk you through it.

## Q7. If I choose to cancel, what is the cancellation policy?

- Did they provide you with a **detailed and documented** cancellation policy?

### Why does this question matter?

With any product and service, sometimes it just doesn't work for you. This can be caused by a variety of reasons - some avoidable - some not.

It's important that you receive a detailed explanation in the event of a cancellation. Do you get a full refund within 30-days? Do you get a full refund within 60-days? How do we go about the cancellation process? Will they make you jump through multiple hoops to cancel? Make sure the software provider gives you a detailed and documented response.

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## Q8. What is your training policy?

- Did they provide you with **detailed and document** training options?

### Why does this question matter?

You and your team will need training to learn the new software system and its features. This will take multiple training sessions to cover all of the topics. Additionally, training sessions can quickly grow if you add new members to your team.

The training you receive can be conducted live online, through recordings, and/or onsite. With these multiple options, be sure to ask the software provider which trainings come at a cost and which ones come at no cost. However, you should expect to get some form of training without paying for it. Lastly, don't forget to ask how often training is offered. You should expect training offered a couple days each week.

## Q9. What are your support policies?

- Did they provide a **detailed and documented** approach to support?

### Why does this question matter?

Any form of software or technology will experience some issues. However, it's important for your software provider to offer detailed options in the event of a failure.

At a minimum, you should expect email support and phone support offered during business hours. Be sure to ask them for turnaround time based on priority. For example, a response to a critical issue should be within two hours, important issues within one day, and moderate issues should be within 48 hours. Don't forget to ask how you can escalate if you're not happy with the support.

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## Q10. During the on-boarding process, do you clean, remove duplicate contacts, and scrub my data?

- Did they answer with a commanding **yes**?

### Why does this question matter?

Any major transfer of data and information is the perfect time to clean and consolidate your data.

To increase your chances of success with the software, the software provider should offer data scrubbing as part of the on-boarding process. This will help guarantee the information in the system is accurate and any future additions of data will be built on a solid foundation.

## Q11. How often do you release major and minor enhancements?

- Did they provide a **detailed and documented** approach to enhancements?

### Why does this question matter?

A company should release major enhancements once a quarter and minor enhancements every six weeks, at a minimum. If they're not, it's a sign they're not proactive on improving the software and more importantly, not listening to their customers. A subscription-based software should provide minor enhancements at no charge. Major enhancements should only be charged to you if they add new functionality that adds tangible value specific to your business.

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## Q12. How do you handle customizations?

- Did they provide a **detailed and documented** approach to customizations?

### Why does this question matter?

You shouldn't expect every piece of software to fit your needs perfectly out of the box. It's extremely common for software to require customizations to fit your specific needs.

For any construction software, you should expect some degree of customization. For many of you, this can come in the form of custom reports and dashboards. Be sure to discuss the process of adding customizations to your account. How long do these customizations usually take and how much do they typically cost? This will help you plan accordingly.



### Q13. How many years have you been in business?

Did they tell you their **company story**?

#### Why does this question matter?

Multiple years of experience in the industry can show how much they've grown. It's an indication that they've learned to adapt and the software has continued to be helpful for many years in a competitive industry.

Be sure to listen to their story and why they became a business. No one wants to work with a software company that's just around to make money.

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### Q14. How many customers do you have that are similar to us?

Were they able to share **customer examples**?

#### Why does this question matter?

Every contractor experiences unique daily challenges. Reviewing a client list for your industry can help prove the software is designed to help your company.

Don't be afraid to ask how the software has been developed to help your specific industry. It may not have every feature you need, but it will show they are making an active effort to continually improve the software to address your industry's specific needs and wants.

## Q15. How do you charge for your service?

Did they provide a **documented** approach to pricing?

### Why does this question matter?

Congratulations! You've asked some critical questions to help learn more about this specific software provider. Now we come down to how this software provider will charge for their products and services.

The first question to ask is if they charge annually or monthly for their software. For many subscription-based businesses, you can expect a per user per month charge. Additionally, this is the time for them to explain their policy in the event of a price increase.

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## Conclusion

It's our hope that the questions above will help you find the best construction software company. Each software company is structured differently and offers slightly different products and services, but they should be able to answer these questions quickly and easily.

If you have any additional questions or need any additional explanations, please contact our team for assistance, we're here to help!

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**Thanks for reading!**