Integrating Disparate CRE Software Systems: The Basics

By: Dom Pernai, President
Cornerstone Solutions, Inc.

At its core, the goal of every technology partner within the construction and real estate space is to develop solutions that serve to boost efficiency, productivity and growth across all levels of a construction business. And there's no denying that the whole CRE universe is and has been in the midst of an enduring technological renaissance for years, if not decades. This is a revolution that has systematically taken hold in nearly all facets of construction organizations – both multi-entity and small – to profoundly impact and streamline their daily operations. From project management, customer relationship management and AP automation to field operations, time tracking and industry-specific accounting software, key decisionmakers in the construction and real estate market have witnessed a prolific introduction to and adoption of new technologies in their industry – and there have been no signs that that trend will be slowing any time soon.

However, what can become a clear pitfall to this rapid and widespread proliferation of new technologies and solutions occurs when disparate systems aren't properly integrated. Without full adoption and integration of a new technology, businesses may find themselves reverting back to the manual methods and endless string of spreadsheets, emails and CSV documents that they were trying to avoid in the first place. In fact, recent surveys conducted for the 2017 Construction Technology Report by JBKnowledge on the general use of technology in the construction industry concluded that of all the construction professionals questioned for the study, 30% reported that none of the applications in use at their organization will integrate, an increase of 3% since 2016. Overall, the survey indicates that when choosing a software solution, contractors and related businesses are "seriously underestimating the importance of integration" in their purchasing decisions. Where a business might have found greater efficiency and a boost in its bottom line by embracing a new solution, a lack of system integration or precise data transfer during the implementation process can lead to inoperability across departments, resulting in gross inaccuracies, missed communications, loss or redundancy of data and more.

Following are just a few steps businesses can take to ensure that the implementation, integration and data migration processes progress smoothly, so that you and your team can get the very most out of your newly purchased solution. By extrapolating on these basic guidelines, you can more readily measure the success of your system integration and meet the expectations initially promised in adopting the new technology.

During the software selection process, do your due diligence.

In the beginning stages of choosing software to review, make sure you gather all leaders and relevant department heads together to create a list of needs that must be met. How must data communicate both internally and externally? How many points of integration are available, so you won't have to duplicate processes later? Doing your homework ahead of time is the first step to finding a solution that will most seamlessly fit into your current business practices.

Once a software has been selected, create a detailed data integration and management plan – and stick to it.

At the very center of the dilemma of integration is the crucial nature of the data itself – how it's maintained, managed and communicated within the infrastructure of the new system. Join forces with IT resources, or consult your third-party technology partner, to develop a comprehensive data migration and integration plan that ultimately ensures your data will be (1) presented in a consistent manner, (2) immediately – or nearly immediately – available to all critical project team members and personnel within the organization and (3) is congregated on a single, centralized platform for access by all project participants. By administering clear directives in a detailed integration plan, the presentation of your data will be that much more uniform, reliable and objective when referred to later in making significant project decisions. The creation of a plan means you'll be able to address any discrepancies at the integration's inception for a timelier adoption process.

Promote full adoption and training on the technology across the entire organization – not just within the context of a single department.

Consider how the data will be handled and communicated organization-wide, and advocate for integration at the enterprise level, instead of department by department. Dedicate ample time for training all pertinent personnel on the workings of the new solution to solidify the importance of the technology in company culture. Spend time with project team leaders and members to answer any and all questions, and present ways in which embracing the new system will increase productivity, quality of work life and nurture relationships with clients. Create a pilot testing environment to make sure everything is running smoothly before the organization-wide launch, audit all system changes and be willing to listen to feedback from multiple perspectives within the company. With an all-on-board attitude, you'll find greater success with the overall integration process.

Evaluate your process after the integration roll-out is complete.

When adopting any new technology, make it a priority to conduct an after-action review to extensively examine – step-by-step – the integration roll-out and the outcome. Did your team hit any snags along the way? What kinds of challenges, if any, has your team faced since? Has the data that was transferred been reviewed for accuracy? How many personnel have already incorporated the new system in their day-to-day? Consider ways in which you can measure productivity levels and efficiencies since implementing the solution and begin to verify the value of your investment. If you need to, enlist the expertise of your trusted technology partner to remedy any issues that have cropped up, or provide additional training for staff that might need it. After all, in the end, finding success in integrating disparate systems is only achievable through company-wide education, careful implementation and a willingness to commit all necessary resources to the endeavor.

Have questions, or looking for more information on the most cutting-edge technologies in the construction industry and how to implement them in your own business? Reach out to Cornerstone Solutions at (866) 482-3400, or [fill out our custom form on our website](#) to be contacted by a Cornerstone expert.