

The Construction Software Fit Check

Is Your Current System Helping or Hurting Profitability?



A practical checklist for construction companies that need better visibility into job costs, cost overruns, reporting, project profitability, and disconnected systems.



JOB COST OVERVIEW

\$2.45M
TOTAL COST

- Labor: \$980K
- Materials: \$765K
- Subcontract: \$540K
- Equipment: \$120K
- Other: \$45K

PROJECT PROFITABILITY

18.7%
Margin

COST VARIANCE

\$215K
12.4%
Over Budget






REPORTING & VISIBILITY

72%
Jobs on Time Reports

28%
Need Attention

Construction software should make your business easier to manage.

But for many growing construction companies, the opposite starts to happen.

-  Job costs live in one system.
-  Project updates live somewhere else.
-  Change orders are tracked manually.
-  Reports are built in spreadsheets.
-  Leadership finds out about cost overruns after the damage is already done.

When software does not match the way your team actually works, your company can lose visibility into the numbers that matter most.

This guide is designed to help you quickly evaluate whether your current software setup is helping your team make better decisions, or creating hidden gaps across job costing, reporting, and project profitability.

You do not need to know exactly what kind of software you need yet.

This checklist will help you identify where your current process may be breaking down.



1. Can your team clearly see job costs in real time?

Use this section to evaluate whether your current tools give your team enough visibility into active project costs.

Check any that apply:

- We can easily compare estimated costs vs. actual costs.
- Labor, materials, equipment, subcontractors, and change orders are connected in one clear view.
- Project managers can see when costs start drifting from the original estimate.
- Leadership can see which jobs are profitable while they are still active.
- Our team does not have to wait until the end of the month to understand job cost performance.





Warning Sign

If your team only sees the full cost picture after a project is complete, your software may be documenting problems instead of helping you catch them early.



2. Are cost overruns being found early enough?

Cost overruns are easier to manage when your team can spot them while there is still time to adjust.

Check any that apply:

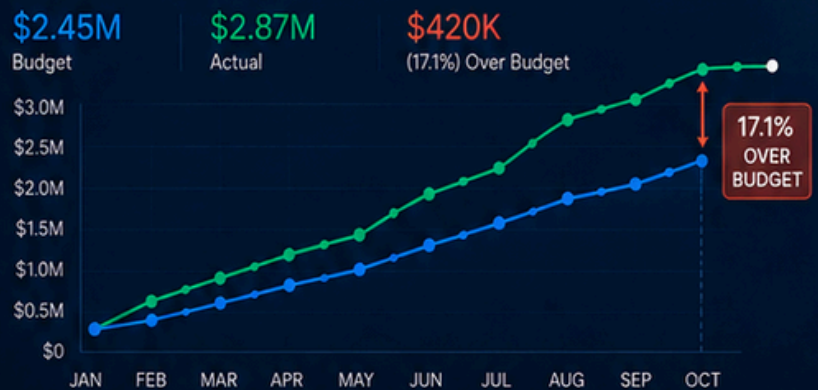
- We can quickly identify when a project is trending over budget.
- Budget-to-actual reports are easy to access and trust.
- The right people are alerted when costs start increasing.
- We can see which category is causing the overrun.
- Our team is not relying on manual updates to catch budget issues.



Warning Sign

If cost overruns are usually discovered after the project is already too far along, your reporting process may be too delayed to support real-time decisions.

BUDGET VS ACTUAL



OVERRUN ALERTS

- Riverside Commons Electrical **+\$185K** Over Budget **High**
- Harbor View Office HVAC **+\$122K** Over Budget **Medium**
- Pinecrest Apartments Concrete **+\$68K** Over Budget **Medium**

[View All Alerts](#)

CATEGORY VARIANCE



Labor and materials driving 75% of total overrun

BUDGET HEALTH



Monitor closely and take action to prevent overruns.

COST DRIVERS



3. Are your reports helping your team make decisions?

Reports should make the business clearer, not create more manual work.

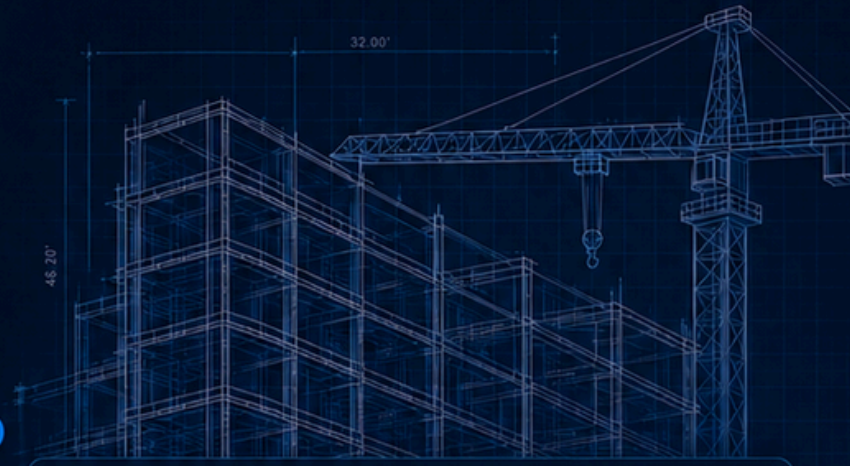
Check any that apply:

- Reports are generated without hours of manual spreadsheet work.
- Leadership can easily see project profitability, margins, and cost trends.
- Our dashboards reflect how our company actually measures success.
- We can track KPIs without pulling data from several disconnected systems.
- Reports show what needs attention, not just what already happened.



Warning Sign

If your team spends more time building reports than using them, your software may be slowing down the decisions it is supposed to support.



EXECUTIVE REPORTING OVERVIEW

PROJECT PROFITABILITY

\$2.87M
Total Profit

↑ 12.6% vs Last Month

AVERAGE MARGIN

18.7%
Gross Margin

↑ 1.8 pts vs Last Month

JOBS ON TRACK

78%
On Budget & Schedule

↑ 9% vs Last Month

REPORT COMPLETION RATE

96%
On-Time Reports

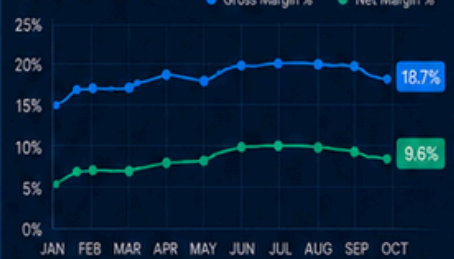
↑ 4% vs Last Month

PROJECT PROFITABILITY



[View Profitability Report](#)

MARGIN TREND



[View Margin Analysis](#)

KPI SCORECARD

KPI	GOAL	CURRENT	STATUS	TREND
Project Profitability	> 15%	18.7%	✓	↑
Jobs On Budget	> 75%	78%	✓	↑
Schedule Performance	> 80%	82%	✓	↑
Change Order Ratio	< 5%	4.2%	✓	↓
Report Completion	> 95%	96%	✓	↑

[View Full Scorecard](#)

DASHBOARD HEALTH



Data Quality: 94% | Timeliness: 91% | Completeness: 93%

[View Health Details](#)

REPORTING EFFICIENCY



[View Efficiency Report](#)

DATA VISIBILITY



98%
Data Sources Connected

- ✓ Financial Systems
- ✓ Project Management
- ✓ Field Data
- ✓ HR & Payroll
- ✓ Equipment Tracking
- ✓ Subcontractor Data

[View Data Connections](#)



4. Does your software match how your team actually works?

The right software should support your process. It should not force your team into workarounds.

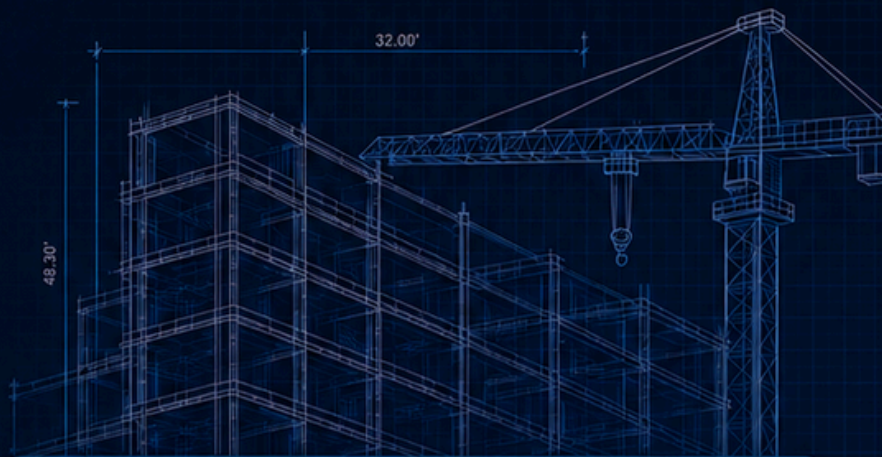
Check any that apply:

- Our software matches the way our team manages projects.
- Field teams, office teams, finance, and leadership all have access to the information they need.
- Employees are not using spreadsheets because the main system is missing key functionality.
- We are not entering the same information into multiple platforms.
- Our current tools support our workflow without creating extra steps.



Warning Sign

If your team has built workarounds around your software, that may be a sign the system no longer fits the business.



WORKFLOW ALIGNMENT



TEAM ACCESS

TEAM	ACCESS LEVEL	COVERAGE
Field Teams	Full Access	98%
Office Teams	Full Access	96%
Finance	Full Access	94%
Leadership	View Access	90%

[View Access Matrix](#)

SYSTEM CONNECTIONS

SYSTEM / PLATFORM	DATA SYNC
PS Project Management	Real-Time
Accounting / ERP	Real-Time
Field Management App	Real-Time
Time Tracking	Real-Time
Procore	Scheduled
Business Intelligence	Real-Time

[View Integrations](#)

DUPLICATE ENTRY

PLATFORMS INVOLVED IN DATA ENTRY



DUPLICATE ENTRY REDUCED



[View Duplicate Entry Report](#)

WORKAROUND RISK

SPREADSHEET DEPENDENCE



- Core System 82%
- Spreadsheets 18%

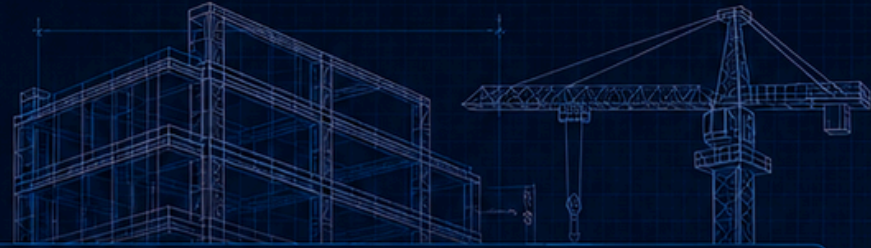
[View Workaround Analysis](#)

PROCESS FIT SCORE



Alignment	Adoption	Efficiency
89%	86%	86%

[View Full Scorecard](#)



5. Are your systems working together?

Construction companies often use multiple tools for estimating, project management, accounting, CRM, scheduling, reporting, and operations.

That is not always a problem.

The problem happens when those tools do not communicate clearly.

Check any that apply:

- Our accounting, project management, estimating, and reporting tools share the right data.
- We do not have to manually copy information from one platform to another.
- Teams are working from the same version of the truth.
- Data from multiple systems can be viewed in one clear dashboard.
- Our systems help reduce duplicate work instead of creating more of it.



Warning Sign

If important information is scattered across too many platforms, your team may be making decisions with incomplete or outdated data.

SYSTEM INTEGRATION MAP



[View Integration Map](#) →

DATA FLOW HEALTH



Overall integration health across all connected systems.

[View Health Details](#) →

SYNC STATUS

SYSTEM	SYNC STATUS	LAST SYNC
Estimating	Real-Time	Just now
Project Management	Real-Time	Just now
Accounting / ERP	Real-Time	Just now
CRM	Real-Time	1 min ago
Scheduling	Real-Time	2 min ago
Reporting	Real-Time	Just now
Field Data	Delayed	45 min ago
Operations	Manual	2 days ago

[View Sync Details](#) →

DUPLICATE WORK REDUCING DUPLICATE ENTRY



[View Duplicate Work Report](#) →

UNIFIED DASHBOARD COMBINED DATA INSIGHTS

Total Projects	Total Revenue
24	\$18.7M
↑ 14% vs Last Month	↑ 11% vs Last Month
Active Jobs	Open Commitments
19	\$3.2M
↑ 19% vs Last Month	↓ 4% vs Last Month

[View Unified Dashboard](#) →

VERSION OF TRUTH SOURCE CONSISTENCY



Data agreement across connected systems.

[View Consistency Report](#) →



What does your software setup need?

Add up how many warning signs you noticed throughout the guide.



Mostly Checked

0-1 warning signs

Your current software setup may be working well. You may only need small improvements, better dashboards, or light integrations.



Stable & Improving



Some Gaps

2-3 warning signs

Your team may be losing time or visibility because of disconnected data, manual reporting, or software that does not fully match your workflow.



Room to Improve



Several Gaps

4-5+ warning signs

Your software may be making it harder to track costs, spot overruns, understand profitability, and manage projects clearly.

This may be a good time to review whether your company needs better integrations, custom dashboards, workflow automation, or custom software.



High Risk. High Impact.



What's Next?

Use what you discovered in this guide to help prioritize the areas that will make the biggest difference for your business.

The right software setup should give you clarity, not create more work.

