

# Key takeaways

## Streamlined project planning

### Mastering production revolves around sound Buildertrend fundamentals

#### Finalize your schedule, then set the baseline on every project

- Build Schedules that can be used again and again in templates
- Base your job on the schedule; different project types will use different schedules
- After setting up the project, capture the timeline using the baseline feature
- Introduce the schedule to the team after getting comfortable with the functionality

#### Adjust your schedules consistently, so they are always up to date

- Set up a weekly team meeting to review project schedules
- Create expectations for when the schedule should be adjusted
- Train team on updating the schedule from the mobile app for easy in-the-field communication

### Take the time to organize key settings for your employees

#### Add default text to features in "Setup" to ensure consistency

- Daily Log standardization
- To-Do's structure
- Custom fields that will help specify information needed for each

#### Create Roles for your internal users based upon job duties

- Set these up first, then invite users to join
- Roles should reflect which features each user needs to adopt to use Buildertrend correctly

#### Customize user access, filters and notifications to keep them on task

- Walk through how to find information using filters with your team
- Ask for feedback on which notifications are causing issues and address them

### Be consistent in the production process from beginning to end

#### Ensure members of your team understand their place in your process

- Create rewards and incentives for your team to use Buildertrend
- Log in as each user to set up filters, grid views and job access
- Talk about Buildertrend during meetings, so everyone knows where information is going to be before they ask

#### Master the use of templates for the most streamlined job starts

- Name templates appropriately, so they are easy to use for all team members
- Create templates for different projects types
- Make sure templates include multiple elements: Schedules, To-Do's, folder structure per project



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