

Your guide to scheduling success in Buildertrend

*How to maximize collaboration and minimize
time wasted with our most popular tool*

Why is scheduling so critical to project success?



Before any concrete is poured or windows framed comes one of the most important pieces to any project - creating the job schedule.

Think of it this way. Completing construction projects without a schedule is like taking a road trip without directions or cooking something for the first time without a recipe. The schedule provides your path to guaranteed success.

Put together ahead of time with all the right details included, smart scheduling ensures:

- Improved efficiency and productivity
- Increased transparency with your team, subs and clients
- Better management of resources and personal
- The ability to track milestones and key metrics
- Streamlined workflows from beginning to end
- Adaptability as changes occur
- Less delays and cost overruns
- Flexibility to still meet deadlines even when dead days occur

So, how does smart scheduling happen? Is it with spreadsheets, whiteboards or classic pen and paper? Well, all construction scheduling isn't created equal. It's true there are many options, but the one that helps you achieve all of these benefits is construction project management software.

That's where Buildertrend comes in. Our platform's robust Schedule tool is the No. 1 solution for builders, remodelers and contractors across the world.

Why? We'll show you in this informative guide. We're unpacking pro tips and quick wins to help your team get the most out of one of our most popular features.

How to build a better schedule

The Buildertrend Scheduling tool is located within the Project Management tab and is the best place to kick off any new job. Like other construction scheduling software, you can digitally build timelines from the comfort of your keyboard – but that’s where the similarities end.

Since we cater just to the construction industry, Buildertrend comes equipped with unique functionalities specific to solving your team’s common pain points. In fact, it seems there are practically limitless ways to level up your schedules in Buildertrend.

Check out these pro tips to make your schedule work for you:

Phases

Organize your schedule by assigning your items to the appropriate phase of the job. Phases will allow you to break your schedule into more manageable sections. You can view your schedule in the Gantt by items and by phases. This is also an option for your homeowners. By limiting them to only phases, your clients can better understand where they’re at with their project.

View all jobs in Gantt

When you are project planning and would like to see the highest overview, you can select all listed jobs from the job menu and opt to view them in the Gantt. This would put every schedule item from every job on the Gantt chart. To create this high-level overview, choose to display jobs rather than items. This will show one bar for each job, giving you an overview of start and end dates of all your active projects.

Linked To-Do’s

Our digital tools seamlessly work together, so the best teams link To-Do’s to Schedule items. This provides the opportunity to associate a pre-construction checklist with onsite responsibilities and tasks. Both the to-do and schedule item will have automated reminders for the assigned individual(s), and the linkage assures that the deadline on the to-do will shift with your production schedule. This eliminates the need to send out a daily email with assignments while establishing the Schedule as the single source of truth. Assign To-Do’s to certain members of your team or subs, making it easy to track what’s getting done and by who from one spot.

Schedule item confirmation

When scheduling your users (trade partners or internal users), you can require a confirmation when the user is notified of a new schedule item or if the schedule happens to change. This can ensure that the individual receives the schedule item notification and will continue to notify until the item is confirmed.

Conflict prevention

When setting up trade partners and internal users, you have the ability to activate the conflict tracker. You can select the maximum amount overlap this individual user can have and if you reach that threshold, there will be an in-program prompt. This prompt will be activated when you are ready to turn your scheduling live so you will be alerted of the conflicts across all jobs.

Saved filters

Use saved filters in the month view to display other items like To-Do’s or deadlines for owner invoices and selections. This will allow you to not only see your project schedule but also other important job-related dates without leaving the month view. To increase usability, you can save this filter and see this information on the calendar each time you access your project management schedule.

OK. Your schedule is built.

Now how should you view your masterpiece?

Not all construction teams work in the same way - and, not all projects work the same way either for that matter. That's why Buildertrend gives you options to view your schedules once they're built and ready to be put to work.

Here are the pros of each available view:

Month, Week or Day

For a bigger picture outlook of what's coming up, Month view is best when choosing to see things by date. Zero in on the details as you get more specific with Week or Day views. Plus, you can view all projects at once or just one at a time.

List view

This is just another way to view what's coming up and when - but not in a calendar format like Month, Week or Day. Tasks will come in as a list with most recent deadlines displaying first.

Gantt

The Gantt view allows you to link and rearrange schedule items with ease. This means when you move one item, the others follow suit and adjust accordingly, keeping everything in order.

Agenda

Interested in seeing how much one person has on their plate? The Agenda view allows you to filter and see what items are assigned to a specific user.

Baseline view

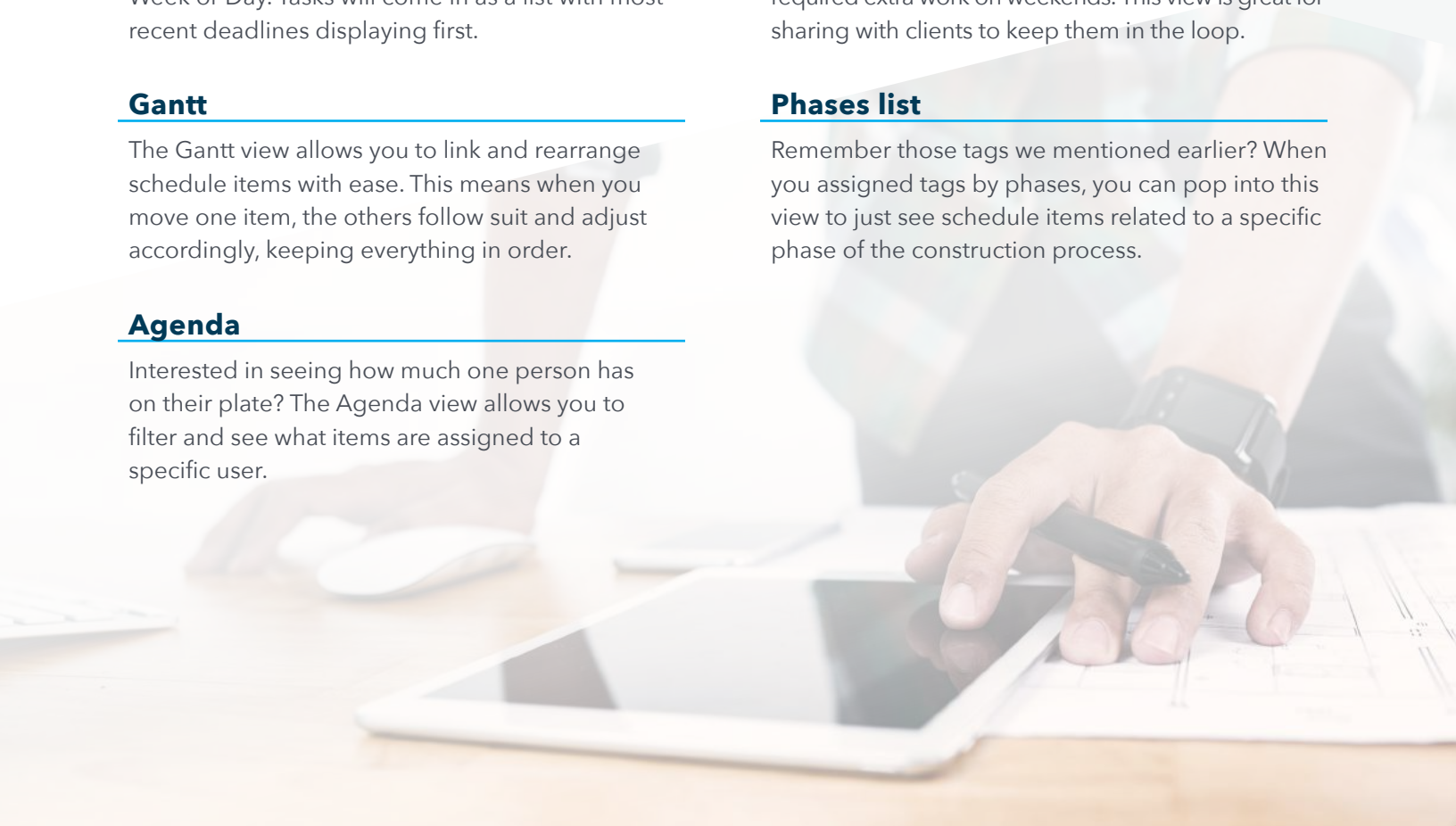
When you complete a schedule, you can next set a baseline. This baseline acts as a screenshot, so if schedule items aren't completed on time or moved, it shows where the time went and why that job is behind.

Workday expectations

This simply shows the days your team works and when you're not, whether it's due to a holiday, rain delays or required extra work on weekends. This view is great for sharing with clients to keep them in the loop.

Phases list

Remember those tags we mentioned earlier? When you assigned tags by phases, you can pop into this view to just see schedule items related to a specific phase of the construction process.





Scheduling to collaborate

How much time per week would you say your team spends giving and getting updates from one another? OK, now what about your subs? And your clients, too? We're probably talking hours upon hours - not just mere minutes.

Buildertrend's Schedule tool takes care of all that back and forth for you. Because it's not just project managers who can view a timeline in our tech. Share with your team, subs and clients, too. The power of this goes beyond keeping everyone on the same page (although the value of that is immeasurable).

Sharing timelines means team communication can be taken to new heights across every stage of the building process. Here's how subs and your crew can collaborate on project details right in the Schedule:

- View To-Do's and mark them off as they go.
- Leave Daily Logs with project updates and pictures, videos or files for added context
- Write comments and questions on tasks

This keeps all correspondence and communication all in one place. However, what if you or

someone on your team would prefer to use their own personal calendar? We've got a solution for that as well.

The Schedule seamlessly one-way integrates with your Google, Outlook or iCal calendar. This makes it simple for you to transfer your jobs and project data to your personal calendar without adding any personal information to your Buildertrend Schedule. Syncing your Buildertrend Schedule with your personal calendar ensures that no matter where you are, you're in the know with all your projects.

Using templates to save time

You did it. You created the perfect project schedule – but now you have another home build coming up and have to start from scratch. Right? Not with Buildertrend.

We know time is money – and our tech is all about saving you dollars and days. That's why you can use scheduling templates to avoid monotonous repetition.

Using templates is a huge time saver when creating a schedule for a new job. Instead of having to begin from square one, you can use a template as the foundation and make changes as needed to fit each specific job.

And, if you ever forget to save a job schedule you really liked as a template before closing it, no worries! You can create

templates from closed jobs, too. By creating templates, you'll save yourself from having to manually fill in information every time you start something new.



Making changes to the Schedule as you go

Unlike schedules created in spreadsheets, on whiteboards – or worse yet – kept in memories, Buildertrend's are reactive. That means you can link items together. If deadlines shift on one item for any given reason, just alter it as needed and

the linked tasks move along accordingly. This efficient way to work comes to life when you're in Gantt view of our tool.

Now, the schedule reflects your most up-to-date changes, keeps things moving forward

but doesn't throw off your entire timeline. All it takes is a few clicks of a button, too. Managing and tracking your progress is seamless and stress free with Buildertrend.

Demystifying the critical path method

If you're not familiar to the critical path method, here is a quick 101. Essentially, this is a model used for highly effective project management. Its foundation is built on dependent tasks or the idea that a new task cannot start until the preceding task is finished.

So, what does that method look like in construction project management? Laying out a critical path prioritizes and allocates resources to get the most important tasks done and reschedules any lower priority work that may hinder your team's progress. Using the critical path method optimizes work on the job site without delaying the end results.

Easily implement this method in four steps with the help of our software:

Step 1

Determine the scope of work and timeline

Before you involve our tech, make a list of all necessary work along with how long each task will take. That should give you an idea for how long your timeline should be.

Step 2

Decide on task dependencies

This is where Buildertrend's Schedule feature really comes in handy. Start by entering in your essential tasks. Then, along the way, easily link individual tasks. This will automatically form dependencies.

Step 3

Define your project milestones

Now's the time to define your deliverables and project milestones. These may be defined as things like completing a full project or a larger group of tasks that have an impact on the overall timeline of a job.

Step 4

Adjust as needed

Did you experience a couple of rain days? Delay in lumber? Unforeseen rework? No sweat. Using the critical path method and predetermined schedule, you can make any necessary adjustments and still avoid pushing the overall timeline or completion date of the build.



How are real-life customers seeing real-life changes

to their business with the Schedule?

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“Things can change on the job site at any moment. With the project schedule, we can easily navigate through those changes and move on to the next part of the project quickly.”

CHARIELLE SOWERS,
director of business development for Owen Homes, Kansas City, Mo.

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“Arguably the most used day-to-day feature since day one and the single best enhancement for project management offered by the platform. Utilizing Templates and To-Do’s linked to the Schedule ensures a consistent process. If Buildertrend was a football team, the Schedule would be their quarterback.”

STEVEN FROSCH,
vice president of construction for Kootenia Homes and Michael Lee Homes, Minneapolis

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“Since using Buildertrend, I’ve noticed that subcontractors are more accountable for their work timelines. For example, subcontractors’ schedules were somewhat up in the air and negotiable before Buildertrend. Now that subcontractors have visibility into a project’s schedule, they aim to complete their work on time since they know that any delays will impact another subcontractor’s schedule.”

BRETT LOTT, founder and president of Brett Lott Homes, Kennewick, Wash.

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“With Schedule templates for design, I can create a new job in three minutes. Then, all of a sudden, clients can access that schedule from Buildertrend and really early on in the process they’re latched on.”

DALLAS STOBBE,
general manager of Haven Builders, Saskatoon, Canada

Ready to see more success with scheduling?

Buildertrend's backbone is the Schedule tool. Why? Because it's what you need to get the job done right and right on time.

- Integrate To-Do's, phases, and reminders to make your schedules more manageable and hold team members accountable.
 - Save time kicking off new projects with templates that can be made custom by job.
 - Centralize communication on project timelines so everyone knows where to look for project details anytime, every time.
 - Link tasks and employ the critical path method to react to changes as you go but stay on track.
- To put it simply: Scheduling in Buildertrend makes complex processes simple. Using our Schedule tool can be simple, too. If you're ready to master this feature, keep this guide handy or schedule a training with your support team.



Or, if you aren't already a Buildertrend customer, talk to a member of our team now.

Adding a quick demo to your schedule is the first step to getting the rest of your schedule in shape.

**Ready to maximize collaboration and minimize
time wasted with our most popular tool?**

Schedule a demo now