### Roll Out Plan:

It’s recommended that Procore be implemented using a “phased” approach as opposed to an “instant-on” approach. The most common strategies for roll out are:

* **OFFICE ROLL OUT**: Roll out to corporate offices first then strategically to branch offices.
* **BUSINESS UNIT/MARKET SECTOR ROLLOUT:** Roll out by market sector (i.e. Commercial, Industrial, etc.)
* **PROJECT START DATE:** Roll out projects chronologically as they come online.

## training requirements for roll out to new project teams

Procore should be rolled out the defined groups or projects in a phased approach. Which generally looks like this (more details of each phase below):

* Phase 1
  + Approx. 2-3 weeks prior to required Procore usage, users are invited and added to a test project.
  + At this same time, a separate email is sent to the users letting them know about Procore, and what is required of them training wise.
* Phase 2
  + Approx. 1 week prior to required usage, 1 or multiple training sessions are scheduled and run by the internal implementation manager.
* Phase 3
  + Users then begin using the system, and internal implementation managers check in at regular intervals to see if there are questions, and ensure users are utilizing the system as intended.

### Phase 1 – Initial Project(s) Invite and Self-Training

Before a new project team is brought online, employees should complete Procore’s role-based certifications, attend weekly training webinars, and be given access to the sand box test project. Details below:

**Sand Box Test Project.** Invite all new employees to the sand box test project. This test project provides an area to practice and review the material that is covered in the Procore Certification Program.

[**Procore Certification**](http://learn.procore.com/)**.** Procore offers both foundational and role-based training courses to teach new users the basics of the system. All courses are self-paced and consist of tool-specific training videos and quizzes.

Two weeks prior to project start date:

1. Add users to the project directory and invite them to Procore.
2. At the same time, separately send them this email, editing the content to take into account the training that you require of them.

Hello [ROLE],

I am excited to announce that our organization recently engaged Procore software as a tool to enhance and streamline our project management efforts. This decision is a culmination of months of research by select project team members to identify the best project management solution on the market.

The next step is to get all of our project teams to use the system. To begin this process, you'll receive an invitation email with the subject line "Welcome to Procore" which will allow you to setup your user ROLE and password to access our Procore account. Once received, please complete the training requirements outlined in the [Getting Started with Procore: Internal Users Guide](https://support.procore.com/getting-started-with-procore-internal-users)article.

We will be having a training meeting to go over all of the features and responsibilities on [insert date]. Prior to that meeting, please complete the following:

* Procore Certification
* Training Webinars [dictate which ones you require]

Thank you in advance for embracing this tool and for all your efforts as we continue to strive for excellence in all that we do.

### Phase 2 – Group Training

Once the above items are completed, your organization’s Implementation Team should work with new project teams to get initial project(s) online, and invite users to their actual Projects if they have not already been. Implementation Project Managers should conduct training sessions with your project teams to ensure complete adoption of the system. We recommend building out a project training schedule as outlined below:

* 1. **User permissions and project creation**
     1. Review permissions for each project role
     2. Discuss the project creation process
  2. **Plan Management**
     1. Review the drawing upload process and as-built functionality
     2. Review the specification upload process and revision management
  3. **Budget and Commitment management**
     1. Review the budget upload process
     2. Demonstrate the buyout process
  4. **Change Management**
     1. Review the workflow and process creation for Change Events, RFQs, and Change Orders
  5. **Collaboration and Mobile tools**
     1. Review the workflow and process creation for RFIs and Submittals
     2. Highlight mobile capability for field team members
        1. Managing Daily Logs
        2. Quality management
        3. Progress photos

### Phase 3 – Go Live and Continued Support

Once the users have gone through a session where your organization’s specific requirements have been laid out, and they have a solid understanding of the system and what is required of them – they can begin using the system.

# Continued Education for Procore

As you roll out Procore, it is common to identify practices that are working well for your company and practices that could be improved upon. Considering this along with the speed at which Procore releases new features and functionality, it is recommended that you develop a plan for continuing to educate your users on features or internal process updates. As a best practice, we've found that peer-to-peer learning and sharing lessons learned between team members can be some of the best training. A few common strategies to facilitate this learning are:

* **Add Procore as an agenda item to your regularly scheduled Project Management meetings**
* **Bi-Weekly or monthly Procore-focused sessions**
* **Procore Q&A/Best Practices sessions with new projects**

Procore will also keep users informed about new features through monthly email campaigns, quarterly product webinars, and posting updates along with corresponding documentation in the notification center C:\Users\Gabe Miller-Smith\Desktop\bell icon.png which can be accessed in the top right hand corner of any page in Procore.