RedTeam
on the Road

Learn, Lead, Build, Transform

Orlando, May 9

![REDTEAM®]

Driving Project Success with Integrated

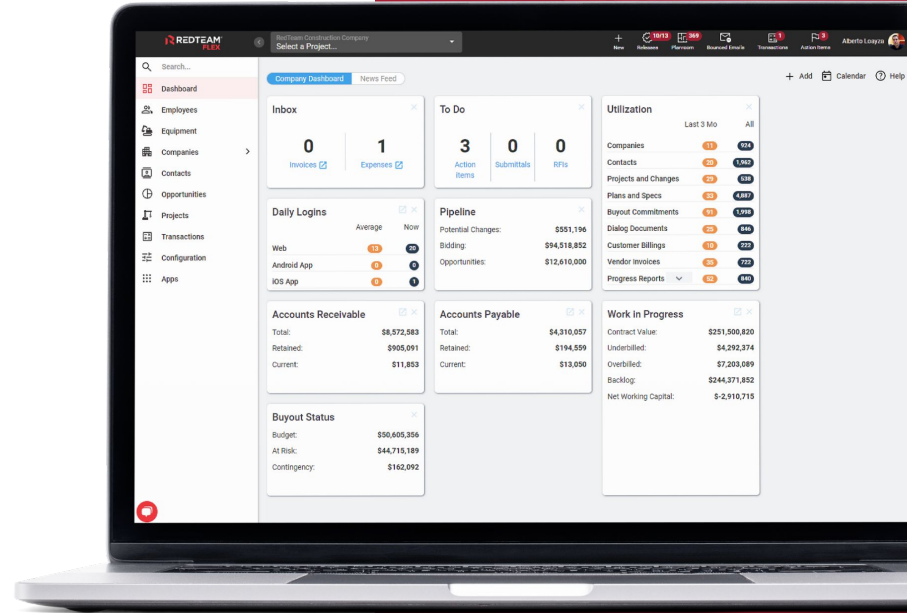## Preconstruction Best Practices

Orlando | May 9, 2024

Driving Project Success with Integrated Preconstruction Best Practices

RedTeam Flex Training

A dedicated training session all about preconstruction best practices. This workflow deep-dive session will share tips and tricks on how to get your projects started using construction management software to simplify workflows and standardize processes for your precon teams from the start. We'll address your workflow questions live and will solution the most effective ways of setting up your projects for success.

AIA Approved Continuing Education

Session learning objectives

After attending this session, you will...

1 You'll learn how to approach setting up construction projects for success starting with preconstruction

2 You'll understand recommended methods and learn best practices to build estimates and request vendor bids during preconstruction

3 You'll learn when and how construction management software helps save time and enables standardization of preconstruction

4 You'll walk away with the knowledge of how best to prepare all project information to submit a proposal to the owner

About me

Austin started his career as a restaurant manager. He became Head of Local Marketing for the Downtown Orlando area. When a great opportunity came along, he decided to shift gears and began working in Construction Management Software on the Customer Service Team for RedTeam. It was there that he learned the ins and outs of the software and how it can meet our clients' needs. From there, he moved to the Configuration Team, where he applied his knowledge setting up new client databases. Now, as an Implementation Specialist, Austin makes use of his extensive RedTeam Flex knowledge to equip our clients with the tools and know-how they need to ensure successful utilization of RedTeam Flex.

About RedTeam

Construction is one of the world's most challenging industries. We get it, because we've been there. RedTeam understands what success looks like every step of the way. That's why we're focused on the entire project team from the office to the field. Your job will never be easy, but having maximum control over schedules, safety, quality and cost makes the day-to-day run better and more smoothly than ever before.

Austin Miller

Implementation Specialist

Preconstruction Steps

- Gather all project Information
- Discover your costs and price
- Prepare all information to submit to the customer

1 Scope Details
Enter the Scope and details of this Project.

2 Project Preferences
optional
Preferences, Phases, Cost Codes, Cost Categories, Unit Prices.

3 Plans & Specifications
optional
Plans & Specifications.

4 Cost Estimate
optional
Add Cost and Project Price.

5 Vendor Quotes
optional
Request Quotes from Vendors.

6 Schedule of Values
optional
Create and update the SOV.

7 Proposal
Prepare and send the Project Proposal.

Project startup
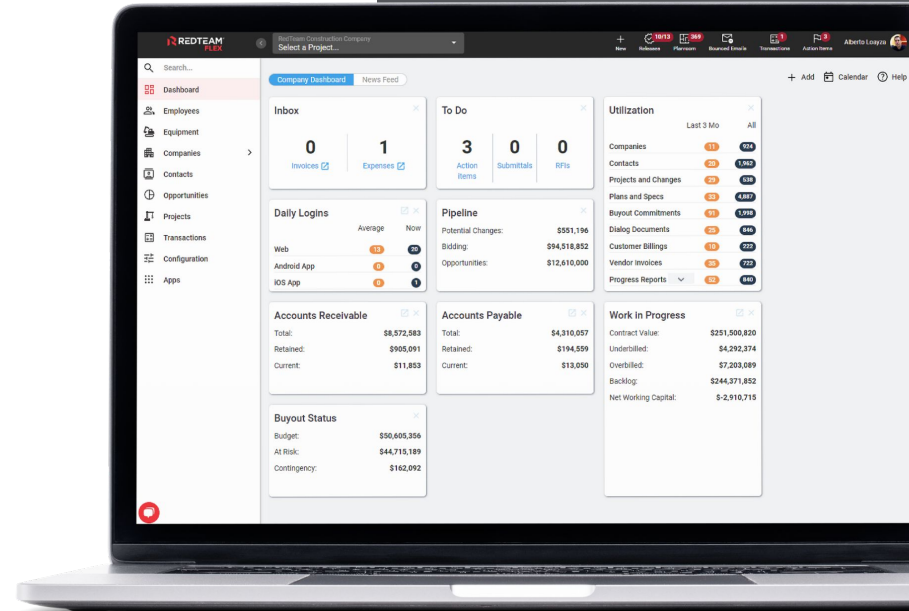
1. **Create a new project**
   a. Ensure accurate customer information

2. **Add additional scope details**
   a. Add additional project information

3. **Upload plans and specs**
   a. Fill out plan information
   b. Name manually vs OCR
   c. Split or don't split plans

REDTEAM® FLEX

Highly configurable construction management software designed to help general contractors manage their construction projects from start to finish.

This product is built for commercial construction companies with complex business organizations and sophisticated workflows that demand advanced integration and configurability.

Estimating and quoting

1. **Add Cost Codes**
    a. Create assemblies
    b. Add estimated cost
    c. Set unit prices

2. **Create bid packages**
    a. Add or assign cost codes
    b. Add bidders

3. **Send Request for Quotes (RFQs)**
    a. Email RFQs in bulk

4. **Upload quotes**
    a. Add vendor quotes to bid packages
    b. Select vendors as best

Creating and submitting proposals

1. **Prepare your proposal**
   a. Select estimate lines you would like to show on proposal
   b. Add attachments
   c. Make edits as needed until you Commit

2. **Submit Proposal**
   a. Promote project
   b. Email proposal

3. **Promote Project**

Session learning objectives

Recap: today you have learned...

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