6 SIMPLE STEPS FOR SELECTING THE PERFECT ARCHITECTURAL SOFTWARE

INTRODUCTION

Architectural software with a PM (project management) focus enables architects, engineers, and contractors to more effectively manage their projects and proposals from a unified platform.

Adopting this software makes it easier to organize and plan projects, track time and expenses, collaborate with team members and clients, streamline workflows, and automate your firm's billing and invoicing. It's a more modern way of working because your firm can replace paper-based tasks with digital workflows and automate manual tasks such as time entry. Clients will appreciate it too, since task management, time tracking, resource planning, and automated billing offer them convenience and transparency.

A preliminary Google search will overwhelm you with how many architect-specific project management tools exist, so how do you narrow it down? Start by determining your firm's unique needs and identifying popular architecture software features. Technology requirements will differ depending on your firm's size, area(s) of specialization, workload, and typical projects. *First, let's focus on your goals and priorities.*

STEP **ONE**

DEFINE YOUR NEEDS

Step number one is to identify what your firm needs to make this software investment a success. Consider your current processes, if you want to change them, your objectives and requirements, and the specific problems you're attempting to solve, such as frequent delays or difficulty tracking project expenses.

One of the best ways to identify what you're trying to accomplish is to get feedback from others in your company. Pinpoint two or three fundamental problems that need to be solved. For example, do you frequently miss deadlines? Is it challenging to keep track of your employees' time or which team member is responsible for which task?

Make sure your team reaches a consensus on objectives, deliverables, training, scope, timeframe, approach, and more. Be clear about why the firm needs this software and realistic about where it'll fit into your technology architecture.

Take time to read editor reviews on reputable sites like G2 Crowd and Capterra, as well as user reviews from architecture firms similar to yours. Look for details in the reviews related to customer support, user experience, and typical results. You may also be able to find video reviews and product walkthroughs on YouTube that

give you a better sense of how each architecture software platform functions.

To conduct a successful introductory software search, answer the prompts below:

— What is your staff's general familiarity with technology like this? How much time and effort will it take for them to get comfortable using the platform?

— Consider your current and prospective IT burden. Will this software ease any issues, helping you save time, money, or reduce friction among siloed systems?

— How can the software improve your clients' experience working with you?

— Make a list of the other technologies your firm considers indispensable. Will your new software need to integrate with it or perhaps eventually replace it?

Our suggestion is to draft these questions and answers somewhere easily accessible by you and your team.

NOTE: The questions suggested are starting points; we encourage additional, personalized prompts based on your needs.

STEP **TWO**

NARROW IT DOWN

Once you have your long list of potential solutions, start eliminating options based on what won't work for your firm. Separate your must-haves and nice-to-haves. If you currently use or previously tried similar technology, list what you like about it and where it falls short. This will ensure you don't end up with project management software that still doesn't help your firm improve project performance.

In addition to assessing your current needs, it's crucial to plan as much as possible for your firm's future. Do you plan to hire several more employees? Will you significantly scale your workload or start delivering new types of projects? The software you choose should support your company's growth without needing to hire additional administrative staff.

To further future-proof your project management processes, ask each software vendor about their product roadmap. How often do they release new features and partnerships? Are they planning to introduce more products? Favor solutions built on APIs (application programming interfaces), which offer more integrations, power, and flexibility.

Be on the lookout for obvious reasons to eliminate systems on your list. For example, certain products may not fit your technology architecture. Some may be too new, too expensive, or missing a feature that's essential to your firm. User reviews will also help you spot red flags. Once you've evaluated your list using these lenses, a shortlist will emerge.

STEP **THREE**

COMPARE AND CONTRAST

Now that you have your shortlist, compare each platform's cost, how advanced its features are, the level of customization offered, user-friendliness, logistics, security, and more.

Read testimonials and watch tutorials of the software in action to get an idea of the user experience. Find out if it's recommended by architecture/engineering groups you trust. Then, schedule a call with each vendor to communicate your needs and goals. If necessary, send a request for proposal (RFP) for comprehensive feedback. Discuss the materials you receive with stakeholders on your team, emphasizing the tooling and details that matter most to you.

Map the features of each package against your requirements and weigh the factors to determine which one most closely meets your needs. Assign a number to each solution based on how well it meets each requirement, multiplied by the weighting factor. The one with the highest score across all requirements should be the best for your firm, but you should also have a backup option.

Here's a features checklist to help you assess each architecture software platform. You won't necessarily need all of these functionalities, but it doesn't hurt to be thorough in defining what you want.

— Resource management

— Task management

— Document management

— Billing and invoicing

— Time and expense tracking

— Presentation tools

— Shared calendar

— Collaboration tools

— Reporting and forecasting

— Accounting capabilities or integration

— Native apps for iOS and Android

— Cloud-hosted

— Notifications

— Application program interface (API)

— Security

— Level of customization and scalability

Don't forget to outline what features your company is currently using and which features will benefit your company in a future state.

STEP **FOUR**

SEE IT IN ACTION

Now that you know exactly what you're looking for and have narrowed it down to one or two choices, it's time to get a personalized demo. While you've already had a call with the vendor and watched video tutorials or reviews, it's important to get a sense of exactly how you'll apply the software to existing processes or what you'll need to adjust. Invite the firm's stakeholders to the demo to see if the technology meets their needs, then debrief afterward.

Many SaaS companies offer a free trial of their platform, which you should take advantage of. However, it's still a good idea to first complete the demo and have the software rep explain everything to you and answer your questions. This will ensure the free trial gives you the clearest sense of if the software fulfills your needs.

Whether testing the software yourself or attending a walkthrough, pay attention to the solution's ease of use. If you and your team are confused or notice any issues, address them during the demo, but note that the software might not be the one for you.

STEP **FIVE**

CONSIDER THE LOGISTICS

Even the most seemingly straightforward software programs can give you a headache if they don't fit into your firm's ecosystem. Whether it's customizations, integrations, or IT, you must ensure that the software will work for you.

Once you've tested each program, you should be able to conclude whether or not there's an out-of-the-box product that will fulfill your needs. Talk to the vendor to see how customizable their software is and how much it would cost to include all your required features.

Additionally, a lack of consistency or integrations can cause software to fall short of your needs. Whether you choose a simple vs. advanced solution, or one that incorporates functionality beyond basic project management — such as accounting and automatic billing — ensure it has all the integrations you need. If it doesn't, ask if the integrations are on the vendor's product roadmap or if you can reasonably supplement it.

You must also consider the software's IT requirements. Can you implement this solution today? Is it complicated to install and train your architects, engineers, and contractors to use it? Ask how the vendor will manage updates and upgrades. Ideally, updates should be cloud-based for ease of installation so they don't disrupt operations.

For some companies, it's a good idea to loop in additional stakeholders to make a best decision for cross-functional teams.

STEP **SIX**

KNOW WHO YOU'RE DEALING WITH

Who your software vendor is matters. Find out if the vendor will provide personalized training, either remotely or on-site. Consider the documentation you'll receive, setup support, and long-term technical support. Ask if assistance is available 24/7 or only between certain hours. Note if the vendor has a customer service team standing by the phone or if you can only receive guidance from an online forum or FAQ page.

Ask yourself: Is it easy to work with the vendor? Do they focus on your needs, or are they only interested in selling software? Reread user reviews, but this time, focus on mentions of customer support to determine if the experience is usually helpful or disappointing.

Look into the history of this software provider. How long have they been in business? Check their website's featured clients page to see if they already serve architecture firms similar to yours. Look into the vendor's trajectory and financial health. Are they growing or remaining stagnant?

We also recommend review websites like G2, Capterra, and Software Advice, for unbiased qualitative feedback.

CONCLUSION

Choosing the right architecture project management software can produce significant benefits, including improved profitability, utilization, time management, and client satisfaction. A robust system that centralizes your firm's PM needs allows you to automate manual time/expense tracking tasks, support collaboration, measure KPIs at the project level, and reliably meet deadlines and budgets.

As you evaluate architecture software for your firm, ask yourself these key questions:

— Does the software meet your team's needs? How will it support your top business goals?

— How easy will it be for your average team member to use it?

— Is it straightforward to communicate status updates or understand resource allocation?

— How much does the software cost? Are there fees related to setup, training, recurring, maintenance, and support? Obtain a detailed written summary from the vendor before purchasing.

— What training options are available? Does the provider offer personalized training, either remotely or in person?

With more than 25 years of experience, **BQE Software** is trusted by 400,000+ users worldwide. Its flagship product, BQE CORE, offers project management software designed by architects for architects, to enable you to save time and focus on work you enjoy. It provides all of the project planning and collaboration features you need, with the flexibility to work on desktop or mobile, and built-in integrations for RFIs and ASIs.

CORE includes time and expense tracking, project management, invoicing, and accounting functionality, including pre-filled timesheets, easy-to-use timers, automated reminders, mobile receipt capture, customizable invoice templates, automatic billing, and more. **Book a demo** to see how BQE can help your team improve its processes with minimal effort and maximum accuracy.

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