

BEST DOCUMENT MANAGEMENT STRATEGIES & TACTICS FOR CONSTRUCTION



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One of the most common questions we see asked in the construction industry today is: what are some of the newest/best productivity tools for construction document management? And while keeping up-to-date with the newer tools for document management is important, what most people don't realize is that it's not just about the tools you use, but the practices, strategies, and tactics you use, too. So today, ZBRELLA is going over some of the best document management strategies and tactics for construction.

- **Capture All Information Digitally-** One of the most important practices your company can adopt to ensure better document management in construction is to, above all else, capture all workflow digitally and have it already wrapped up in your business before anything else even happens. There are a number of software programs that can do this, and as long as you are able to capture information (for example in a database or PDF), you're one step ahead of the game.

It's important to have a line of business or a system in place that allows you to capture all of your necessary business activities digitally so that information goes to, and is stored in, one place for immediate access at all times. Capturing info digitally is one way of eliminating the extra step of documenting information manually and after it's obtained, allowing your company to run faster and more efficient.

- **Tie Your Files to Jobs-** Right under capturing information digitally is tying your files to projects. Why is this important? Because it eliminates a large majority of human error that occurs when this process is not automated. When files aren't tied to jobs, there is a lot of room for people to misinterpret documents and who and what they're supposed to be affixed to.

If this step is taken care of in the beginning, an employee opening up a document will be able to know immediately what project that document is tied to. Take the example of approving a job quote. An application (or suite of applications) that can automatically enter the action into a database will then be able to also automatically generate a document and tie it to a customer or project for future use. By using software than can allow you to adopt this practice, you're eliminating several steps and enabling a much more user-friendly way of actually finding the right documents for the right projects.

- **Use a Barcode Scanner-** This is only if you're dealing with paper files, but for those of you that are, using a program or system that can read barcodes can be a great document management best practice. There are multiples programs and software that exist that allow you to scan in your paper files. Barcode scanning is essentially scanning in multiple documents in a single shot.

Depending on the software you use, it will then automatically name and organize all of your files based on the embedded barcode information. Barcode scanning is a relatively popular means of document management as it's been proven to improve speed, accuracy, and efficiency of document management workflow, and can be a lot less intimidating than other solutions and practices.

- **Enforce File Naming Standards-** One of the easiest and most effective ways to ensure better document management is to enforce good file naming standards. What do we mean by that? Simply set a standard for naming your files that all workers must follow, and make sure you enforce it.

For example, including specific dates, company names, project numbers, and functionality are all good categories to use when trying to adopt a higher standard of file naming. Try to avoid saving files with long names and saving files in folders that are within folders that are within folders. The point is create easy to identify, concise, short file names, so keep them obvious and within plain sight, and your document management should become increasingly easier.

- **Experiment With a Combination of Cloud Tools-** Sometimes, not one practice or application will be enough to truly remedy document management. Every company is different and unique, and experimenting with a combination of Cloud tools can often be a great strategy for more efficient document management.

Using something like Google Drive in combination with Slack, a real-time messaging, archiving, and search engine for companies, is just one example of being able to create a historical log of where every document was posted. Using something like Slack would allow you to instantly search those documents, proving that experimentation can sometimes be the key to hitting the right document management solution. Don't be afraid to try new things.

Conclusion

At the end of the day, document management is really all about knowledge management, IE: where is the information I need right now, is it easy to access, can I identify it quickly? And when these questions need to be addressed, efficient document management is really what companies need to be concerned with. Good practices, well thought-out strategies, and clever tactics are the ways in which efficient document management can truly be achieved, and if you're committed to implementing just a few of the standards we've covered, you're already putting yourself in a much better position. yourself in a much better position.