



Personalized Training Services Ensure Smooth Implementation

Client Westphal Electric Used a Train the Trainer Strategy
When the Company Changed its Electrical Estimating Software

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Software Systems

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Westphal & Co., a full-service, family-owned electrical construction company based in Wisconsin, needed to replace its electrical estimating software.

After a rigorous search led by CEO John Westphal, the company chose to purchase ConEst's IntelliBid estimating software, SureCount takeoff software, and ConEst Electrical Formulas.

ConEst designed and implemented four days of personalized training for Westphal's CEO and a Project Manager to learn the new software and ensure the applications were optimized for the company's existing operations so that they could transfer the knowledge to their employees.

Westphal's leadership returned from the training with a comprehensive understanding of their new software, as well as modifications that would allow the company to hit the ground running after getting its workforce up to speed with their new estimating software.

The new estimating software from ConEst was implemented on the company's schedule and has quickly become a trusted and useful tool that enables the company continued success.

The Decision

Why ConEst was the Electrical Contracting Software for Westphal

Westphal Electric launched a search for new estimating software after its previous estimating vendor was acquired by a company that chose not to support the estimating product.

Westphal's CEO, John Westphal says, "We had been a customer of ConEst competitor MC Squared, so we needed a replacement because the product we had been using for 30 years was not keeping up with the times and the technology."

After participating in demonstrations of ConEst's products and weighing the differences between ConEst and a competing product from Accubid, the decision was made to purchase ConEst's solution, which Westphal says has a more holistic approach.

"ConEst actually cares about their assemblies – not only whether they are

logical, sensible, easy to use, arranged correctly, etc., but that they return real world, current, non-obsolete products out of the database. Not some generic easy to create database item, but the actual manufacturer's part number. The fact that IntelliBid hangs its hat on having everything accurate from top to bottom, and in a complete fashion, is what made the decision for us."

According to Allan Goodwin, ConEst's Director of Product Development/QA, "As of March 2019, we had 482,675 assemblies and 130,582 items in our database."

As part of a team of eight people that evaluated various estimating software solutions, the CEO took a close interest in the process of acquiring and implementing new electrical estimating software. "We were looking for a company that would continue to grow

and support our business needs.”

According to the CEO, electrical estimating “is a critical function in our company and the accuracy and usability of the estimating software is a

strategic critical tool. It's a line of business practice that must be as good as our ERP (Enterprise Resource Planning) software. I've always believed that, and I've never wanted to delegate that to anybody else.”

The Training

Customized Instruction Means Efficient and Effective Knowledge Transfer

“Most customers have developed a way of doing business over the years and it's nice to be able to show them how to use our software and still keep their methods of operating going.”

In the past, Westphal used a train-the-trainer strategy to deliver instruction efficiently and with a schedule that was optimized for its operations. CEO Westphal says, “We always knew we wanted to do a train the trainer process. It's worked for us in the past, with our previous software, where we had a few super users who would be both really proficient with the application and would be the people who would be the admin users.”

After discussing their training options, classroom, online and onsite, with ConEst Training Co-ordinator Barbara Makris, it was determined that customized training at ConEst's main office in Manchester would best suit their needs.

ConEst works with the customer to plan a training experience that's amenable to their organizational processes. ConEst, Makris says, “has a diverse set of customers, so we don't approach training as one-size-fits all, instead we consult with our customers and tailor training to accommodate that customer's particular needs. Our customer base reaches beyond traditional electrical contracting. A lot focus on low voltage, wastewater treatment plants, schools, government jobs.” Explained Makris, “In the end, we teach people, across all of these related industries, to use our software and get a return on their investment.”

Westphal and estimator / project manager, Nate Vande Zande travelled to ConEst's head office, in Manchester, New Hampshire, and learned how to operate and integrate their new

software into their business operations.

“Westphal was the type of customer that would excel with this type of training. John had a specific goal in mind and it aligned very well with our recommendations. It couldn't have been a better fit for Allan as an instructor,” says Makris.

Allan Goodwin delivered the training and helped the company tailor the training to support existing practices at Westphal Electric.

Goodwin says, “Most customers have developed a way of doing business over the years and for us to tell them to change is kind of presumptuous. It's nice to be able to show them how to use our software and still keep their methods of operating going.”

Goodwin and Westphal were able to set the pace of learning – giving them the choice to skip concepts and operations they were familiar with, but also providing the option to dive more deeply into other features of the software.

The CEO says, “We learned the thinking behind the software and why it was designed the way it was, which really helped us get insight into the tool so that we know the best way of using the software.”

“Westphal got something very specific for their own business needs,” says Goodwin, who says that the opportunity to deliver training sessions dovetails nicely with his role as Director of Product Development, because he's

able to hear direct feedback and field questions about ConEst's estimating software and that information is very important for future development of the software's features.

"We were able to answer the questions they had in great detail," says Goodwin. Once the customer understands the foundations of the software, they are able to ask for help tailoring the

software to the needs of their specific business processes.

The sentiment was echoed by John Westphal, "One big reason why I went was to be able to take a deep dive and look under the hood and understand how the engine works so that I could have peace of mind going forward that this is the product that we wanted and that our people were using it effectively."

The Roll Out

Personalized Training Ensured a Smooth Implementation

Upon returning to their head office, the company set up three separate training sessions. With locations in Wisconsin and Iowa and employees working at various job sites, the company could minimize downtime and ensure all their electrical estimating staff were properly trained by scheduling small group sessions to introduce the new software.

Training for the company's estimators was a close copy of the sessions completed at ConEst. Over two days in a classroom setting, "we presented the IntelliBid training to our staff in almost the exact manner Allan trained us – we started at the job setup and finished with the bid recap."

They relied on ConEst for some technical support logging in new users, CEO Westphal says. "It was like ConEst

was on standby just waiting to help us – excellent service."

It was paramount for Westphal that every person who interacts with their electrical estimating software should have consistent training. "In our company I'm very strict about means and methods and procedures and processes and best practices so nobody gets to estimate off the back of an envelope, nobody gets to estimate using Excel. We all use the same tools so that we're all using the same language and singing out of the same hymn book. Every project manager, whether they are flavoured more toward PM or estimating or the other way or full time one way or the other, everybody's got to learn how to use the software."

The Result

ConEst Electrical Estimation Software Hits the Satisfaction Factor

The roll out has gone very well, according to Westphal's CEO. Everyone in the company uses IntelliBid and the company's estimators and project managers are doing just fine, with no hiccups. It will take "probably six months to a year for people to start using the software like a 15-year old does on their smart phone."

"We're looking for our estimator's fluency, speed, efficiency, comprehension, and capability with the

software. That is difficult to measure objectively, but easy for us to discern subjectively." Westphal calls this metric the satisfaction or happiness factor with the software.

"Just like with any tool, if the craftsperson likes using it, if it makes the person's job easier, if its operation is intuitive or ingenious, people will love using it." For Westphal, he says of IntelliBid, "Our users will not be bashful in telling us. So far, so good."

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