Six Steps to Success With FieldChat

Introduction

If you're reading this, you're probably an owner, senior manager, administrator, or member of the project leadership team who has decided to move forward with FieldChat. *Welcome!*

This guide will help you ensure that you achieve success with FieldChat. Like every valuable software product, FieldChat requires up-front commitment to get up and running with your team. It takes some effort to change how people communicate and get them comfortable and confident. However, after just a week or two, you will see your team become more responsive and efficient with their communications, and witness reduced re-work and mistakes.

So let's walk through how to roll-out FieldChat for maximum success.

Step 1: Get Your Team Bought In

FieldChat is a fantastic communications tool that will keep everyone on the same page.

However, this won't happen if people don't change their communication habits. And that means your team needs to buy in and understand why you're using FieldChat. **Make sure that everyone on your internal team is aware that FieldChat is coming and are 100% committed to using it**. This includes your foreman, superintendents, project engineers and project management team. If you are a general contractor, you also need to make sure that your subcontractors have been instructed to use FieldChat.

Here's what you need to tell them:

> *Going forward, we will be using FieldChat for our jobsite communications. Instead of group texts, emails, voicemails, or phone calls, we are going to use FieldChat. Formal documentation like change orders, submittals and RFIs are still OK through email. But day-to-day communication and coordination will be done through FieldChat. This will be an adjustment for everyone at first, but the payoff in improved communications will be worth it. Please work with us to make this happen!*

To help your team get familiar with FieldChat and its benefits you can book a session with one of our specialists. We are delighted to run a 15 minute web conference session with your team to show them FieldChat and explain how it can be used on your projects. **We recommend that you do this a day or two before you plan to activate FieldChat**. You can book a session with us here at a time that is convenient for your team.

> **FieldChat Tip:** To get an internal support system started, pick one or two users who are good with technology. Establish these people as the go-to FieldChat resources for the rest of the team.
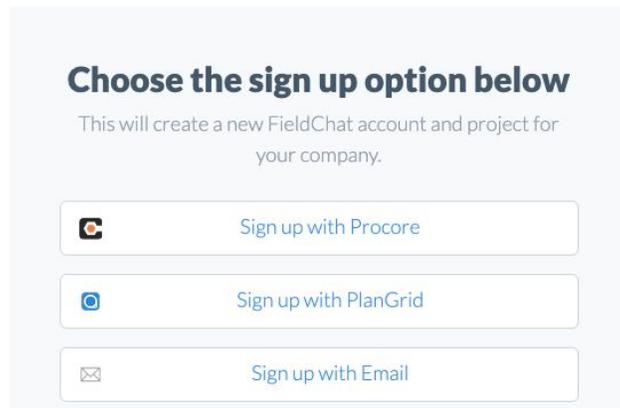
Step 2: Create Your FieldChat Account

Go to www.fieldchat.com and create your account using the "Sign-Up" link at the top of the page. Or, if you have already installed the FieldChat mobile app, you can use the "Create an account for your company" option when you start the app.

New to FieldChat?
Create an account for your company

If you are an existing Procore or PlanGrid user, you should sign up using your Procore or PlanGrid account. This will save you a few steps, and allow you to share your project directory contacts with FieldChat so that you don't need to manually re-enter their contact info.

Choose the sign up option below
This will create a new FieldChat account and project for your company.

- Sign up with Procore
- Sign up with PlanGrid
- Sign up with Email

The sign-up form will ask you to **choose your first project**. If you are using Procore or PlanGrid, select a project from a list showing your existing projects. Otherwise, enter a new name for your first project.

You will also be asked to **choose a name for your first channel**. A channel is a group of people who want to communicate together like a text or chat group, but it's managed inside FieldChat (see Appendix A for a list of commonly named channels). If you are a general contractor, you could make your first channel "Project Team" for your project leadership team. If you are a specialty contractor, you could make your first channel the name of one of your teams or one of your jobs.

To complete the final step, FieldChat will send a text message to your mobile phone with a six-letter code to validate your phone number. Your account will then be created. Viola!

Step 3: Invite Your Users

Before you can use FieldChat, you need to invite the people you want to communicate with. You will need to know either their mobile phone numbers or their email addresses.

First, start with your immediate team. If you are using PlanGrid or Procore, you can automatically import your users when you first sign up for your account. You can then add them to your first channel using the "Add more people link".

Otherwise, if you are creating a standalone account, you will need to invite them to FieldChat. (Shortcut: If you are using the mobile app, you can copy their contact info directly from your phone's contact list).
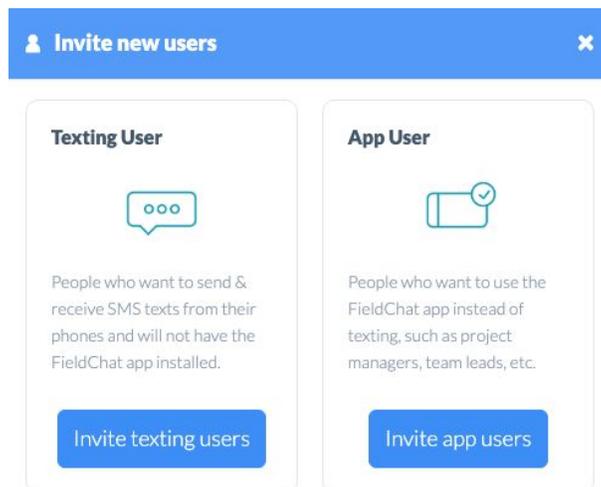

Choosing between inviting a Texting User and an App User

There are two types of invites:

Texting Users
Texting users are immediately added to FieldChat in the channels you choose, and can communicate by replying to a text message. This is a great choice for foremen and subcontractors, as they don't need to install the FieldChat app or learn anything new. They simply need to reply to a phone number. The first message tells them the name of the project and the channel. The second message you can customize with any instructions you like.
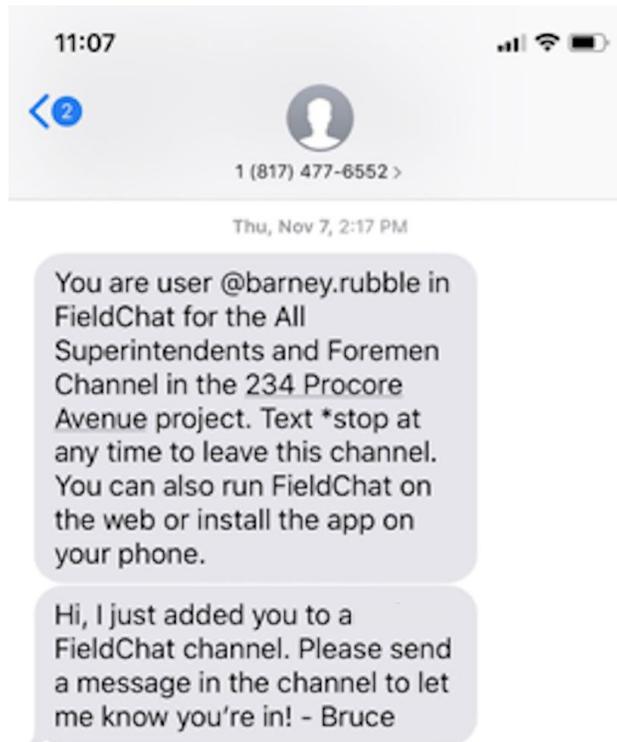
An example text message from FieldChat to a new texting user on the "All Superintendents and Foremen Channel"

App Users

App users are sent a link to download and sign-up for FieldChat on their mobile device or desktop computer. You can send these invites to their email address or their mobile phone. App users will only appear in the FieldChat channels that you invite them to. In general, anyone who will be in more than two projects or channels will want to use the FieldChat app.

> **FieldChat Tip for Procore users:** Make sure your Procore project directory has mobile phone numbers for your foremen and subcontractors. FieldChat will automatically import these numbers and use them for text messaging. When you make changes to your directory simply re-import these numbers.

> **FieldChat Tip for PlanGrid users:** FieldChat will import your users, but PlanGrid unfortunately does not share mobile phone numbers. You will need to add mobile phone numbers for your texting users in FieldChat by editing their user info.

Step 4: Create Additional Channels

FieldChat is organized into projects and channels. Channels are just groups of people that need to communicate around a topic in a group chat. You can see who is in a channel by looking at the Channel Details. There is no limit to the number of channels you can create, although FieldChat trial accounts only allow you to assign a maximum of four phone numbers.

Channels are groups of people that need to communicate around a topic. Here are some everyday examples:

- Topics like Safety, Quality, or Permits
- Channels for your internal project team (e.g. Project Team, Superintendents, Foremen)
- Channels for each of your subcontractors (e.g. Electrical, Drywall, Exterior Finishes, Framing, MEP, Elevator, Cabinetry, HVAC, Paint, Plumbing, Windows, Railings, Tile, etc.). It's typical to include at a minimum the foreman / superintendent (the person on-site who is coordinating the work), as well as the project manager or owner (the person responsible for managing scope and costs). Refer to the appendix at the end for a longer list of example channels.
- Site broadcast channels (one way channels - recipients cannot respond e.g. Site Alerts)

After you have invited your initial core team members, you should create additional channels for each of your major sub-trades and teams according to the nature of your project, and send them text invites.

Creating a new channel

When you create a channel, you assign a name, assign an admin owner (can be yourself or someone else), and a notification style. The default notification style is Group Chat, which means that every user can see every message. Another popular notification style is Broadcast, which only permits one way messages from a channel administrator. This is useful for site-wide messages relating to weather, safety or other situations.

You can select one or more people that you would like to invite to the channel, along with an optional message.

FieldChat Tip: To send text messages on a channel, it needs a phone number. You assign a phone number when you create or edit a channe with the "Enable text notifications" checkboxl. Phone numbers are unique to a channel for the lifespan of the project.

☑ Enable text notifications
  Enable text notifications and FieldChat will assign a phone
  number to this channel

Step 5: Creating Additional Projects

You can create additional projects as needed in FieldChat. If you are using Procore, you should link your new project to the corresponding Procore projects. There is no limit to the number of projects you can create.

> **FieldChat Tip:** If you wish to set-up channels that are company wide, you can create a new project set to the name of your company or a name like "Company Wide" for this purpose.

Step 6: Reinforce Communications via FieldChat

You must ensure that everyone is communicating through FieldChat.

You will need to lead by example. As a project leader, you will need to show initiative and use FieldChat continuously to ask questions, send out updates, and flag issues. If you set the example, your team will follow suit. (Tip: If you are sent text messages to your personal number reply back using FieldChat).

If someone leaves you a voicemail or email with an important update that could have been shared in FieldChat, push the communication back into the correct FieldChat channel. **If communication patterns are established early in the project and continually reinforced, people will jump on board.**

Here are some examples:

Progress
Hi @joe.smith what are you working on today? Are the doors installed?

Issues
We cannot start site work, could you please remove the scaffold this morning?

Deliveries
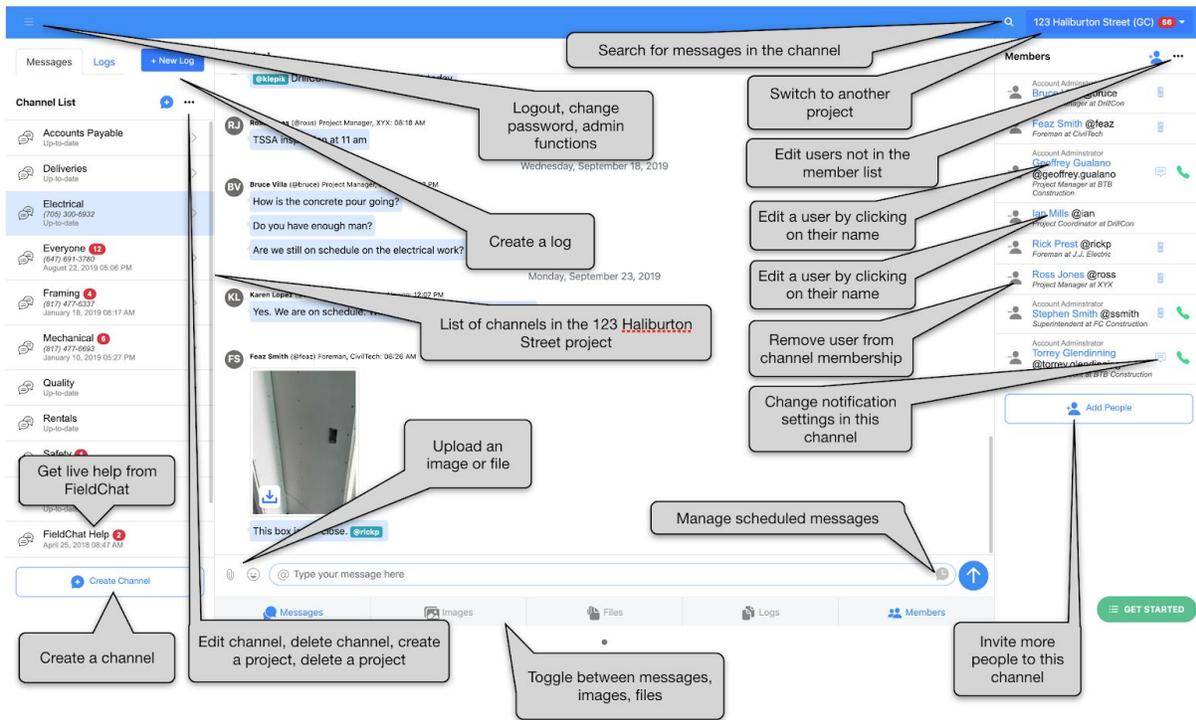Windows arrived and are being stored in room 201.

Inspection
Electrical inspection passed.

Scheduling & Coordination
We need two more electricians tomorrow to stay on schedule.

FieldChat Quick Reference

FieldChat running in a desktop browser

FieldChat Tip: FieldChat runs best on your desktop in the Chrome browser. You should also install the iOS or Android FieldChat app on your mobile phone for the best experience.

Need Help?

If you have feedback or questions, you can reach us at any time in the FieldChat Help channel and we'll get right back to you. Or you can email us directly at any time at help@fieldchat.com. (but chatting with us on FieldChat is of course way better!)

Appendix A
Commonly Used Channels

- Foreman and Superintendents
- Project Team
- Site Alerts
- Safety
- Quality
- Permits
- Project Team
- Housekeeping
- Owner Channel
- Cabinetry
- Civil
- Drywall
- Elevator
- Electrical
- Exterior Finishes
- Framing
- HVAC
- MEP
- Paint
- Plumbing
- Railings
- Tile
- Windows
- Railings
- Tile