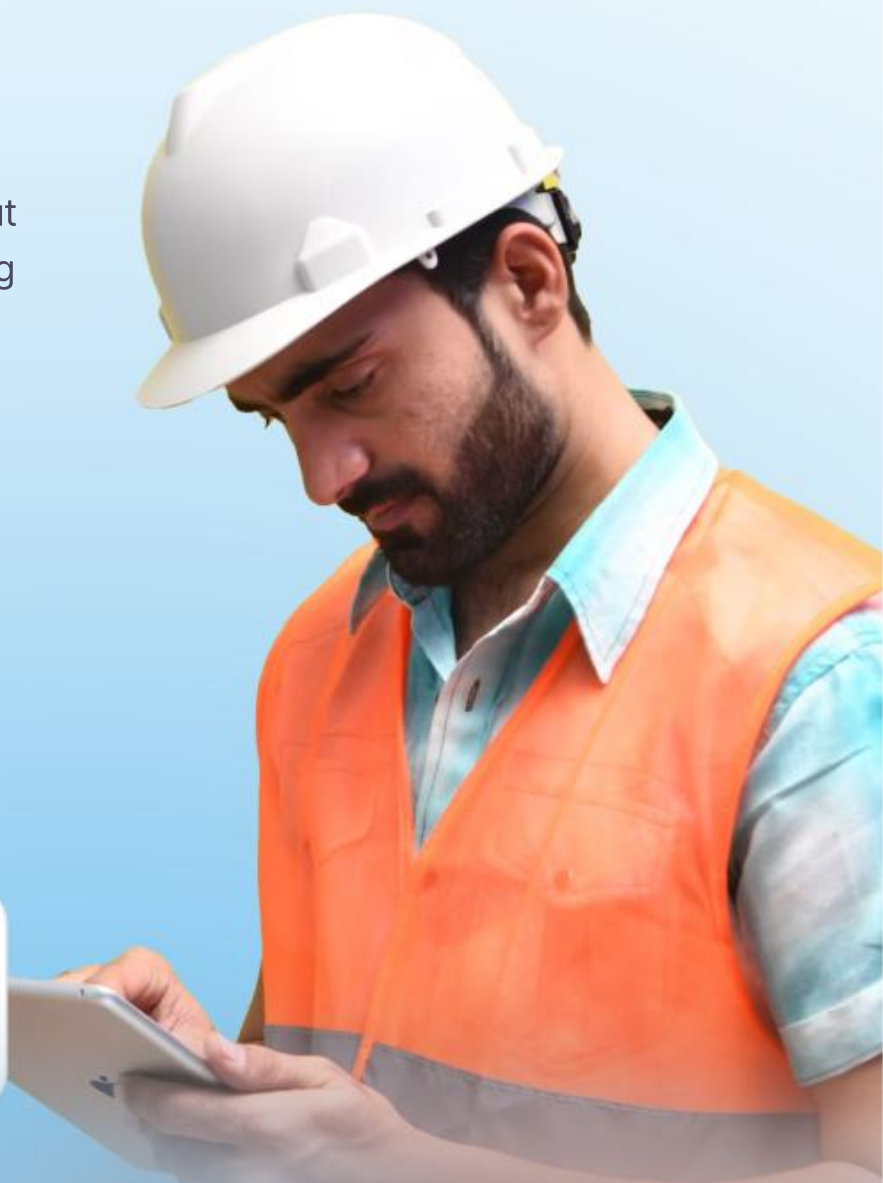


The Implementation Guide for Construction Project Management Software

How to roll out Insite properly, without slowing down site teams or disrupting delivery



James Smith
Contractor





You're Not Too Busy to Switch. You're Too Busy Not To.

Adopting new software often gets pushed to the bottom of the priority list on site. Teams are stretched, deadlines are tight, and the thought of rolling out a new system mid-project feels impossible. But continuing to rely on paper, spreadsheets and WhatsApp threads isn't just inconvenient it's actively holding your business back.

This guide is for operational leads, project managers and business owners who know they need a better way to run their sites, but don't think they have time to make the change. Here's how Insite gets you live properly, without disrupting delivery.

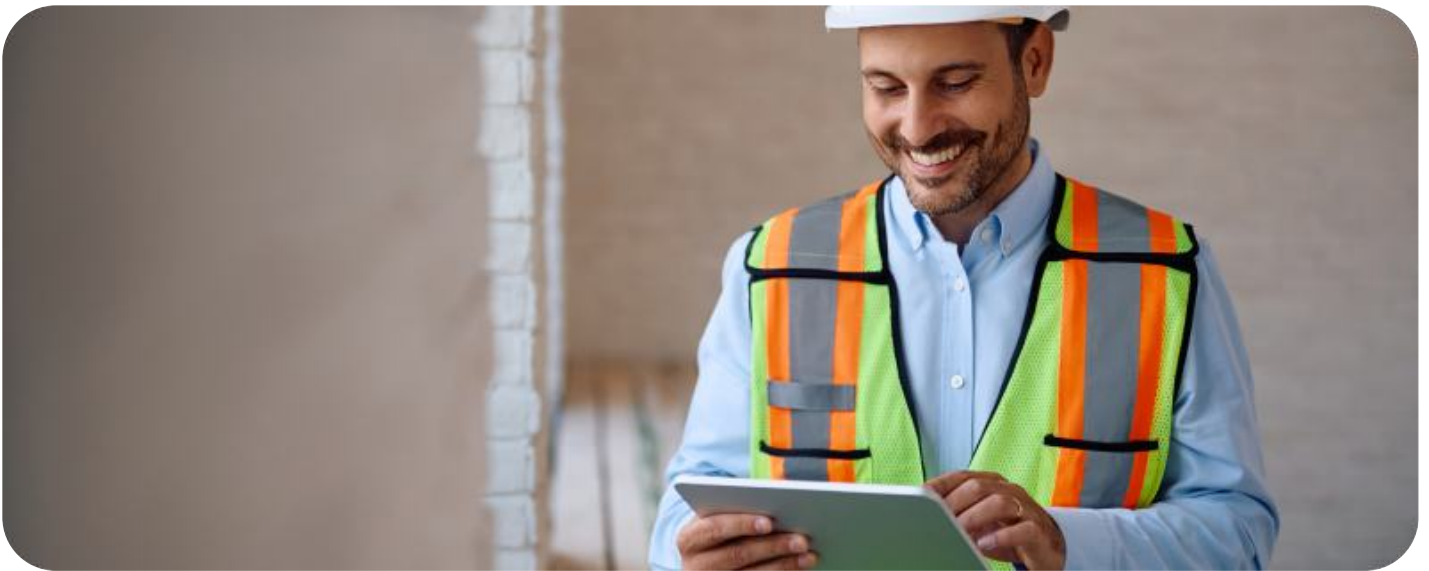


IMPLEMENTATION GUIDE

The Implementation Guide for Construction Project Management Software

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Setting Up **Insite** Properly

1. You're not too busy to switch. You're too busy not to.

Insite is implemented and configured by our own team, not handed off to a generic onboarding process. Every account is built around how your business actually runs a site not dropped into a one-size-fits-all template.

What it includes:

- ✓ Account and user creation.
- ✓ Setting up your first live or upcoming project.
- ✓ Uploading existing drawings and documents.
- ✓ Configuring user roles and permissions.
- ✓ Building your QA/QC templates, digital forms, inspection, snagging and handover flows around the tools you already use.

What it doesn't include:

- ✗ An IT department, or a dedicated project team on your side.
- ✗ Formal requirements documents or lengthy planning phases.
- ✗ An overhaul of your existing processes.

2. What You Need (and Don't Need) to Get Started

You don't need to change how you work to implement Insite. All that's needed is a clear picture of your current process and a willingness to have it built into the platform.

What it includes:

- ✓ A short kickoff call to walk us through your current process.
- ✓ A main point of contact (or two) to act as project lead.
- ✓ Any existing drawings, forms or documents you want brought into Insite

What it doesn't include:

- ✗ An IT department.
- ✗ A formal requirements document.
- ✗ Integrations we offer them, but none are required to get started.
- ✗ Hours of internal planning sessions.

3. Your Implementation Timeline

24 hours

to core platform access, so your team can start exploring immediately

Upgrade bathroom walls with larger marble-effect tiles.



Tristan Webb

Replace bathroom tiles

Approved

3-4 weeks

typical timeline for a fully tailored onboarding, because we build the platform around your processes

Reports

PDF



Mill Brook Report.pdf

Items by status



What the timeline looks like:

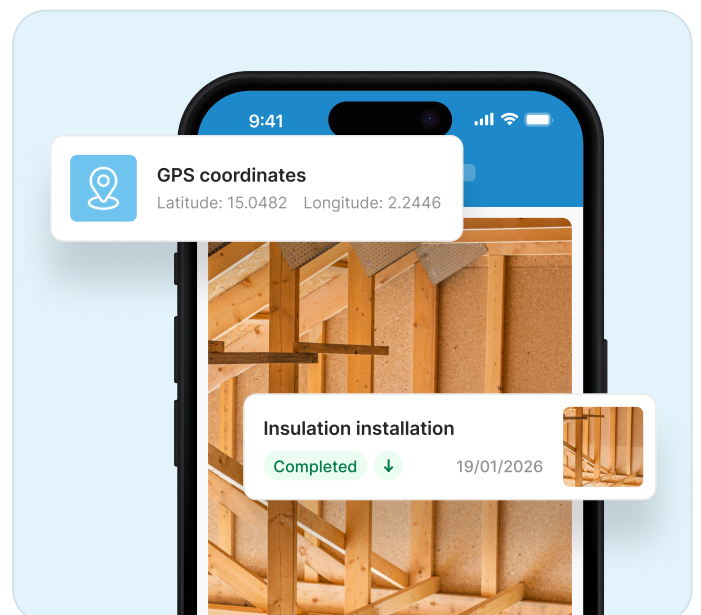


Compared to traditional construction software rollouts that can take months, this is a deliberately fast, hands-on process with no corners cut on getting the configuration right.

4. Built Around How You Actually Work

Insite isn't a fixed, one-size-fits-all system. It brings QA/QC, H&S inspections, digital forms, site diaries, snagging, handovers and workforce management together in a single platform and every template and form is built around your specific process, not a generic library.

That flexibility is what makes adoption stick: your team isn't learning a new way of working, they're using a digital version of the way they already work.





Driving Adoption **On-Site**

5. Why Site Teams Actually Use Insite (and Stick With It)

Insite is built for the people who actually use it day to day: a mobile-first platform designed for site teams with limited time and no patience for complicated tools.

- ✓ **Simplicity:** Clean, intuitive design that's easy to pick up with minimal instruction.
- ✓ **Mobile-first:** Built for phones and tablets, and fully usable on site.
- ✓ **Speed:** Logging issues, uploading photos and accessing documents takes seconds, not minutes.
- ✓ **Clarity:** No hidden menus, no complex navigation.

6. Minimising Training Time Without Sacrificing Quality

Training fear is one of the biggest barriers to adoption on site. Insite removes that barrier with a champion model, so your team isn't stuck in a training room.

How we keep training minimal:

- During onboarding, we work directly with one or two main points of contact on your side your "champions".
- Champions act as the middle layer between our team and your end users.
- Templates and forms are built to be intuitive enough that end-user training is minimal.
- Custom guides are handed over at go-live, so champions can support their own teams without leaning on us for every question.

7. Rolling It Out Without Resistance

Change on site is never automatic. Here's how to drive buy-in without disrupting delivery:



1. Start with a pilot project to demonstrate an early win



2. Share clear, concrete benefits: less admin, fewer delays, more visibility



3. Highlight ease of use and mobile access this isn't another system to fight with



4. Involve your champions in the build so they have ownership from day one



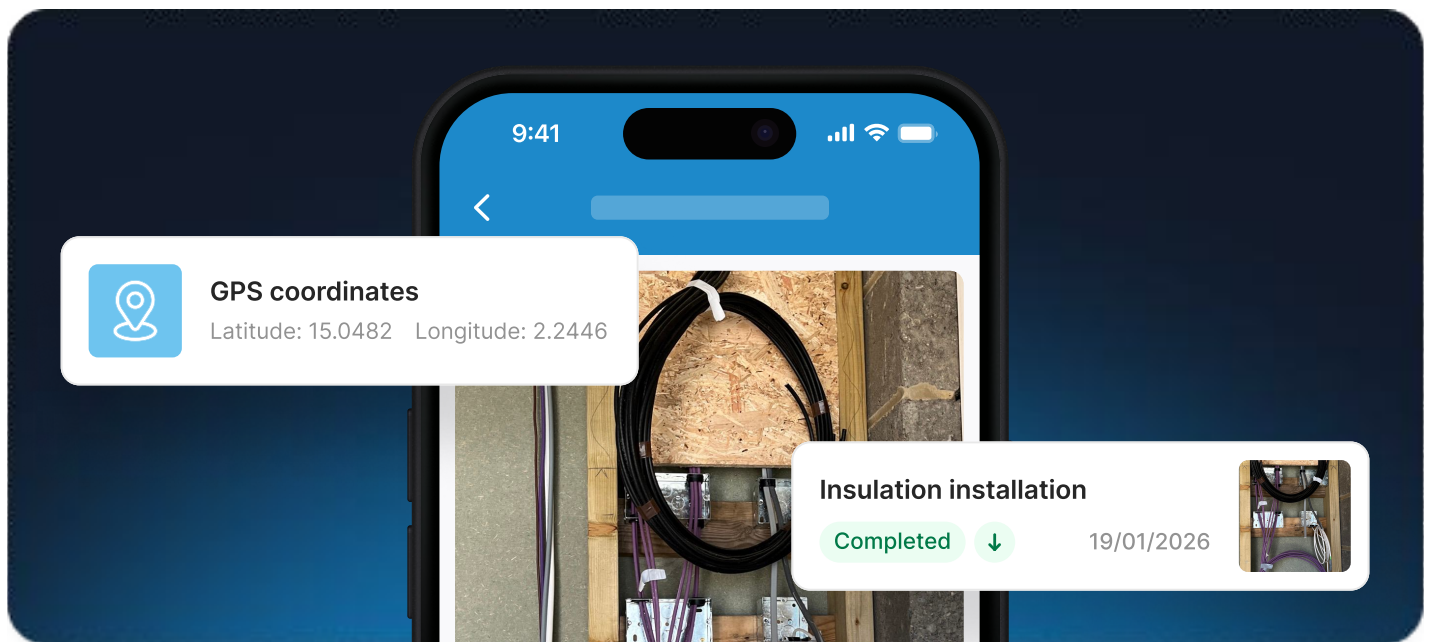
5. Celebrate early wins to build momentum across the wider team

8. Replacing the Paperwork, Not Your Toolkit

Insite isn't designed to rip out every system you already use. If you rely on other software, that's fine Insite works alongside it. What it does replace is the manual admin: paper forms, spreadsheets and WhatsApp threads that are slow to fill in, easy to lose, and impossible to search when you need proof of what happened on site.

The result is one place to capture QA/QC, H&S inspections, digital forms, site diaries, snagging and handovers without you needing to give up tools that already work for you.





9. What Happens After Go-Live

Your Insite journey doesn't end at go-live. Support is founder-led our founders are directly involved in the customer success team, so you get hands-on, direct support that a large corporate platform can't offer. That's a core part of who we are, not something that thins out as we scale.

- ✓ A founder-led customer success team as your ongoing point of contact
- ✓ Direct access to support when you need it, not a ticketing queue
- ✓ Ongoing help configuring the system as your needs evolve
- ✓ Custom guides your champions can use to onboard new starters

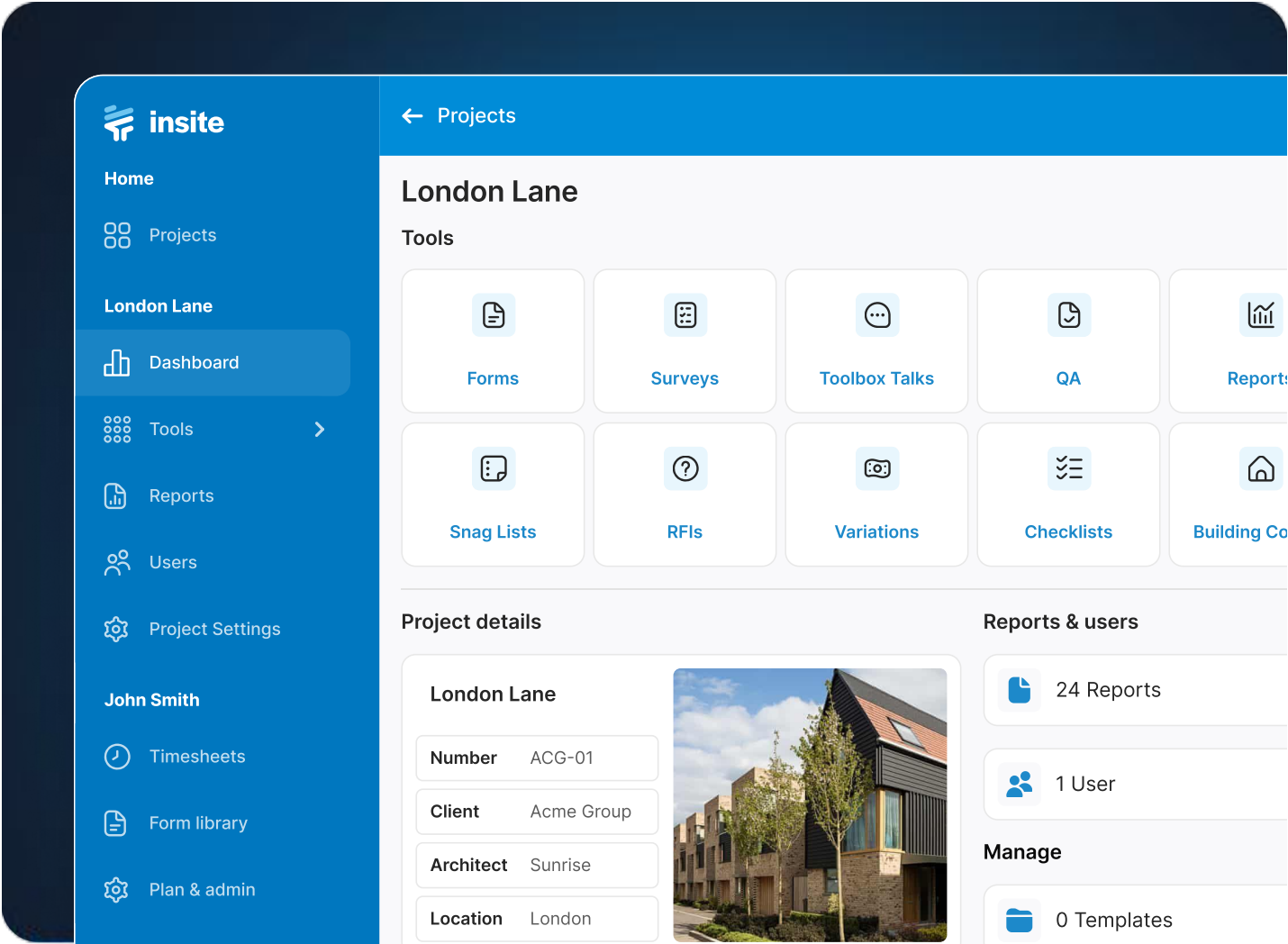
10. Scaling Across Your Business

Insite is built to grow with you, whether you're running one project or a hundred.

- ✓ Reusing templates and permission sets across new projects
- ✓ Standardising processes for consistency across sites
- ✓ Rolling out in phases start with one team, then expand
- ✓ Centralised visibility to manage project health as you scale

11. Built for Site Work (Even Without Signal)

Basements, remote sites, and patchy signal are part of the job. Insite works fully offline your team can keep capturing photos, forms and updates without a connection, and everything syncs automatically the moment they're back online.



Simple Change, Lasting Impact

Busy subcontractors need results now, not in six months. With Insite, you can roll out a project management platform that's built around how you actually work quickly, properly, and without disrupting delivery.

From kickoff to full site adoption, Insite is built to deliver value fast, with our founders staying hands-on throughout. If paper and WhatsApp are holding your business back, it might be time to make the switch. And this time, it won't slow you down.

- ✓ One platform.
- ✓ One process
- ✓ One less thing to worry about.



Ready to get started?

Book a demo or schedule a discovery call with our team, and see how quickly Insite can be live on your sites.

[Book a demo](#)

This is now fixed, please see attached photo.



Metal_framework.jpg



Peter Adams

Reject

Approve

Paintwork issues

Completed

