

Implementing Design Software Guide

You have made the decision to implement new design software into your business.

You are excited, the staff is excited, this is going to be great!

But let's sit back and breath for just a minute and think what is the best way to implement the software so it becomes a meaningful part of your business and not an overwhelming ordeal for everyone involved.

Follow the planning, training and personalization advice below so you and your team can hit the ground running when you implement any new software into your business.

Planning

The best implementation starts with serious planning.



Adequate training is essential to ensure that everyone is prepared to use the software. Don't go in with the mindset that you don't need training – you do, even if it is time set aside to self-teach and practice, you need to allocate training time in your planning.

Know upfront what you can spend on training in both dollars and time. Here are some helpful steps to follow to understand what training you need.

Initial Steps

Step 1 – Most software applications include a simple tutorial to get you started. Take the time to go through the tutorial to give yourself a benchmark of what you know and what you need to still learn.

[Envisioneer](#), as an example, comes with a Quick Start Guide. You can find it in Envisioneer by going to, Help>Quick Start guide or on our website: <https://www.cadsoft.com/quick-start-guide-2/> . The Quick start guide will give you a foundation of knowledge in Envisioneer.

Step 2 - Did you feel comfortable with the routines outlined in the tutorial? Either way I would suggest you do the same exercises again. I always recommend repeating a lesson since the first time you are reading/following and the second time gives you the chance to evaluate if you really understand the material.

Step 3 – Evaluate what areas are important to you and where you may want to concentrate learning.

- a) Are you using the design software for presentation purposes?
 - a. Make sure you understand well how to build a good model – walls/doors&windows/ceilings/roofs/columns&beams/foundations
 - b. Make sure you understand materials. How to adjust them to make them more 'reflective' or 'transparent' for your presentation renderings.
 - c. Make sure you understand the rendering process and all the associated settings.
 - d. Make sure you understand how to make VR app exports or work with the VR mode inside the software.

[Envisioneer](#), as an example, has both VR options and both have advantages depending on the audience so make sure you learn how to do both, so you can take advantage of each feature.

- b) Are you using the design software for estimating purposes too?
 - a. Make sure you understand well how to build a good model – walls/doors&windows/ceilings/roofs/columns&beams/foundations
 - b. Make sure you understand and can alter the backend formulas and assemblies that calculate the associated materials.
 - c. Make sure you understand framing settings, so it accurately counts all lumber.
 - d. Make sure you understand report templates, so it lays out the information in the order you want.
- c) Are you using the design software for permit drawings?
 - a. Again, make sure you know how to build a model, working drawings are a direct reflection of the model you built.
 - b. Do you understand how to add and alter the titleblock on the worksheets?
 - c. Do you understand how to insert views of your model on the sheets?
 - d. Do you understand dimensioning and adding text?
 - e. Do you understand lineweights/scales and how to print?

Step 4 – Decision time. Do you have the time to invest in self-teaching or is formal training from an Instructor a better fit for you? Perhaps it is a blend of the two. Make sure you know upfront the best way you learn and what works best as a training plan. Work with your software provider for the options.



- a) Self-teaching Methods:
 - a. Watch online videos that are available. Look on Youtube and search up as much as you can on video lessons if you are a visual learner and want to see how it is

done before you try it yourself. Jot down notes as you watch so you can refer to them when you try yourself.

As an example, Cadsoft has the [Cadsoft YouTube](#) channel. There are a variety of different subjects depending on how you want to use the software: design/estimating/working drawings/renderings/presentations.

- b. Try creating sample models. Read “sample models”, not production models yet. You don’t want to stress yourself out with working on a model that you need right away. Take your time and test your skills as you make your way through the videos.
- b) Formal training. Refer to the training options below for the best option for you and your company to make the most of your software investment.

Training Options

You know your schedule so select a training strategy that will work for your team. Whatever you decide to do for training just ensure you stick to it.



- o Full Day learning. Get everyone in, focused on only the new software and professionally trained to move forward. Depending on the amount of people that will be using the software you can do it either in your office with a private instructor or / a regional training seminar offered at tradeshow venues if it is just one or two people.

Cadsoft, as an example, offers specific 1, 2 or 3 day class agendas that have been an excellent option for many people or we can customize the agenda to suit your needs. [Contact sales](#) for more information on what we can do to make implementation work for you.

- o Online training. Doing a couple of hours each day for a few weeks to learn bits and pieces to slowly build your knowledge as you go may be best for those that have busy schedules. Most software vendors will offer online classes to suit your schedule.

Personalization

Personalization involves adding unique elements into the catalog of the design software – wall types that suit your region or furniture and paint colours that match your specifications or ensuring the prices of each element reflect your fees. This adds extra value for those estimating with the software or for those that use specific brands and need them represented correctly in your models.

Personalizing a catalog is added time and cost but if it saves time and effort later than it is well worth the upfront spend.

[Envisioneer](#), as an example, comes with a catalog of elements and settings and for some, all your requirements will be fulfilled immediately upon installation, and for others it will need personalization. Work with the Cadsoft team to develop a personalization plan for your team. The [sales team](#) can give you more information on what is involved.

Timing

If I can offer a single piece of advice it would be - don't try to keep your existing schedule.

Learning is an ongoing process. There is going to be a period of adjustment as everyone learns the new tool so ensure you work that into your project deadlines for the first few projects as you go live.



You are about to change how you do something and positively disrupt your business, so expect down time as you get used to the new workflow.

Ensure your implementation time line is realistic and staff are properly trained before you dive in head first. If you make a good implementation plan than that new design tool will be a great new asset into your business.

For more information on Cadsoft Envisioneer and the training materials available for it, see www.cadsoft.com or visit our YouTube channel: <https://www.youtube.com/user/Cadsoftcorp>