ACROSS THE TABLE

BUSINESS CONSULTING

INDUSTRY STACK 13 · CONSTRUCTION COMPANY

The Construction Stack

Seven systems from bid to closeout, and why the document trail is the business.

Knowledge Article I13

AI Stack Series · acrossthetable.biz

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WHO THIS IS FOR

You run a general contracting or specialty construction company doing projects rather than service calls. You bid, you win some, you build, and you fight to get paid for what changed along the way.

This guide is for the owner or project manager who has watched a profitable job turn unprofitable in the gap between what was asked for and what was documented.

If you mostly do service work, the contractor stack is a better fit than this one.

START WITH THE WORK, NOT WITH THE APPS

These are not twenty lists of AI apps. Each stack starts with the jobs a particular business performs, then matches AI and conventional software to those jobs. Treat it as a menu to evaluate, not a shopping list.

For this kind of business the work runs in one line, start to finish:

> **THE PATH THE WORK TAKES**
> Bid → Project → Field → Cost → Closeout

Broken into the steps a customer actually moves through:

- Bid
- Contract
- Plans
- Schedule
- Field
- Change orders
- Costs
- Inspection
- Closeout

Read that line left to right. You bid, you sign, you build from plans, work happens in the field, things change, costs accumulate, it gets inspected and it closes out.

Construction profit is not usually lost on the bid. It is lost in change orders that were verbally agreed and never papered, and in job costs that were not visible until the job was over.

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THE STACK, PIECE BY PIECE

Every tool below is matched to one of those steps. You do not need all of them, and you should not buy all of them at once. Read the “What it is” column first and find the step where your business is losing the most time or money.

Tool	The step it covers	What it is	Price
Procore	Construction management	Project management for construction — drawings, RFIs, submittals, field.	Annual by volume.
Autodesk Construction Cloud	Design and construction data	Design and construction data in one place, from model to field.	Per user/year.
CompanyCam	Field documentation	Time-stamped job-site photos organized by property, shared with the office.	Per user/month.
Sage	Job cost accounting	Accounting and job costing, strong in construction and manufacturing.	By product and seats.
DocuSign	Agreements	Electronic signature and agreement management.	Per user/month.
Microsoft 365	Documents	Office apps, Teams, SharePoint and admin controls.	Per user/month.
Power BI	Analytics	Microsoft’s business intelligence and dashboards.	Per user/month.

Full construction management platforms are built for a certain scale. A small residential builder may do better with a lighter project tool plus rigorous documentation, and move up when the project count justifies it.

What to watch out for in each one

None of these are reasons not to buy. They are the things owners tell us they wish they had known first.

- Procore — Priced on construction volume.
- Autodesk Construction Cloud — Assumes design-side tooling.
- CompanyCam — Crews have to take the photos.
- Sage — Heavier than QuickBooks to set up.

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- DocuSign — Envelope limits on lower plans.
- Microsoft 365 — Licensing tiers get confusing.
- Power BI — Data modeling is the real work.

WHERE AI ACTUALLY FITS IN THIS BUSINESS

Document search, RFI assistance, project-risk analysis, meeting summaries, cost analysis, progress reporting.

In plain terms, that means:

- Searching a project's whole document set for every mention of a detail, so you find the clause before the argument rather than after.
- Drafting the response to a request for information, with the relevant drawing references already pulled.
- Summarizing a long site meeting into decisions and owners, which is the record that settles disputes.
- Reading job cost data and flagging where a project is drifting while there is still time to act.
- Turning field notes into a weekly progress report the owner will actually read.

Nothing AI produces here substitutes for a signature. A change order is a contractual document. A summary of what was agreed is not the same thing as what was agreed.

WHAT TO SET UP FIRST

Do these in order. Finish one before you start the next. Most owners who try to do all of it in one month end up using none of it.

1. **Document the field from day one** Time-stamped photos of every project, every day. This is the cheapest and most powerful thing on this list, and the one that wins disputes.
2. **Get job costing right** You need to see cost against budget while the job is running, not at the end. Construction-grade accounting exists because general accounting software does not do this well.
3. **Put change orders on paper, always** No verbal change orders, ever, regardless of how well you know the client. This single rule is worth more than any software.
4. **Centralize project documents** Plans, submittals, RFIs and correspondence in one place with version control. The question is always which drawing was current.
5. **Then add analytics** Dashboards across projects are genuinely useful once you have several projects of clean data to compare.

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WHAT IT COSTS TO START

Construction management platforms are priced by project volume or construction value, which means the cost scales with the size of the business rather than with headcount. Get a clear answer on how the vendor counts, because the difference between pricing models is substantial at your size.

Construction-specific accounting costs more than general accounting software, and job costing is the reason. If you cannot see cost-to-complete by job, you are flying on last quarter's instruments.

The comparison that matters is one disputed change order. Most of this stack costs less than a single unrecovered one.

The price column in the table above tells you how each one charges — per user, per location, per contact, or a percentage of every sale — not what you will pay. That is deliberate. The charging model is what decides whether a tool stays affordable as you grow, and it is the part that does not change every quarter. Get the current dollar figure from the vendor's own pricing page before you budget.

THE RULES UNDERNEATH ALL OF IT

Legal · Privacy · Data protection · Security · Compliance · Records · Audit · Risk · Human oversight — underneath every one of the twenty stacks, not an afterthought.

Lien rights have strict deadlines that vary by state. Your systems should surface those dates; missing one can cost you the whole receivable.

Safety records, certified payroll on public work, and inspection documentation are legal requirements with retention periods.

Contract documents, change orders and signed approvals are the evidence in any dispute. Store them where they are dated, versioned and findable years later.

Subcontractor insurance certificates need to be current at the time of the work, not at the time you filed them. Track expiry dates.

MISTAKES THAT COST THE MOST

- Verbal change orders, in any circumstance.
- Discovering job cost overruns at closeout rather than at week six.
- Working from a drawing that was superseded, because version control lived in email.
- Thin photo documentation, then losing a dispute to the party who had photographs.
- Letting a subcontractor work on an expired certificate of insurance.

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THE CEO DECISION

- Can you see cost-to-complete on every active job today?
- How many change orders on your last project were agreed verbally first?
- Who controls which drawing is current, and how does the field know?
- Are your lien deadlines tracked by a system or by a person?
- If a dispute arose on a job from last year, what would you be able to produce?

YOUR QUICK REVIEW

- ☐ Every project is photographed daily.
- ☐ Job cost against budget is visible while the job runs.
- ☐ No work proceeds on a verbal change order.
- ☐ Project documents have version control.
- ☐ Subcontractor insurance expiry dates are tracked.

ADDITIONAL RESOURCES

Tool	Where to find it	What it is for
Procore	www.procore.com	General contractors on real commercial projects.
Autodesk Construction Cloud	construction.autodesk.com	Projects where drawings and models drive the work.
CompanyCam	companycam.com	Proving what you found and what you fixed.
Sage	www.sage.com	Businesses needing job-level cost accounting.
DocuSign	www.docusign.com	Getting documents signed and stored properly.
Microsoft 365	www.microsoft.com/en-us/microsoft-365	Microsoft-centered companies running the whole business on one suite.
Power BI	www.microsoft.com/en-us/power-platform/products/power-bi	Microsoft-centered reporting.

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Tool	Where to find it	What it is for
Across the Table AI Assessment	acrossthetable.biz/#assessment	Fifteen minutes. Tells you which job to start with before you buy anything.
The Scaling Edge	acrossthetablebiz.substack.com	Weekly newsletter for owners without a business background.

Go deeper on the pieces

Each of these is a full guide comparing the three tools that do that job:

- Understand the numbers — acrossthetable.biz/knowledge-articles/understand-the-numbers/ (covers Power BI)

CONTINUE LEARNING

The Across the Table AI Assessment takes fifteen minutes and starts from the work the business performs.

The guides above cover the individual tools in plain language.

READ AND CONNECT WITH ACROSS THE TABLE

Across the Table website: https://acrossthetable.biz

The Scaling Edge newsletter: https://acrossthetablebiz.substack.com

YouTube: https://www.youtube.com/@AcrossTheTableConnie

LinkedIn: https://www.linkedin.com/in/connie-jacobo-ramirez

Questions: info@acrossthetable.biz · 480-582-4716

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