Driving Net Zero Construction

Client Onboarding

Sterling

The Smarter, Faster & Greener Estimating Community

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2026

Welcome to Sterling

Purpose of this document

This document outlines the **objectives**, **responsibilities**, and **success criteria** required to onboard a client successfully onto Sterling's construction estimating software.

It is designed to ensure **both** parties have a shared understanding of **scope**, **expectations**, and **readiness** before progressing through each onboarding stage.

The onboarding journey is structured into three stages:

1. Initial Discovery & Overview
2. Formal Training & Pilot
3. Self-Sufficiency & Sign-Off

Progression between stages is dependent on the successful completion of defined objectives laid out through this guide.

Stage 1: Initial Discovery & Overview

Objective

To develop a clear understanding of the client's current estimating processes, data, and business goals, and to confirm suitability and scope for the software implementation.

Client Responsibilities

The client is required to provide the following information and materials:

1. Current Process Overview

- A high-level walkthrough of how estimates are currently produced
- Tools currently used (e.g. spreadsheets, legacy software, manual processes)
- Level of detail typically included in estimates
- Key challenges or inefficiencies in the current workflow

2. Sample Project Data

To allow realistic configuration and validation, the client must supply representative examples, such as:

- Recent or typical bills of quantities / cost breakdowns
- 2D drawings (PDF or CAD formats)
- 3D models (if applicable, e.g. IFC, Revit, or similar)
- Any standard templates, cost libraries, or schedules currently in use

All data shared will be used solely for onboarding and configuration purposes.

Stage 1: Continued

3. Business Goals & Expectations

The client should outline:

- What success looks like for them when using the software
- Key outcomes they want to achieve (e.g. faster take-offs, improved accuracy, better reporting)
- Any known future requirements or aspirations that may fall outside the initial scope

These expectations will be reviewed and, where appropriate, documented for potential future phases.

4. Key Stakeholder Nomination

The client must nominate:

- A primary point of contact
- Pilot users who will participate in the initial implementation and testing phase
- Decision-makers responsible for sign-off at each stage

Deliverables

- Documented understanding of current processes
- Confirmation of pilot scope
- Agreement on onboarding objectives and success criteria

Stage 2: Formal Training & Pilot

Objective

To train nominated pilot users and validate that the software can support the client's estimating workflows and use real project data.

Training Scope

Training will typically cover:

- Software navigation and core concepts
- Project setup and configuration
- Importing and interpreting drawings or models
- Quantity take-off workflows
- Cost build-ups and estimate generation
- Reporting and export processes

Training may be delivered via live sessions, recorded material, or a blended approach.

Pilot Participation Requirements

Pilot users are expected to:

- Actively participate in training sessions
- Complete assigned exercises using provided or real project data
- Test workflows aligned to their day-to-day estimating activities
- Provide feedback on usability, gaps, and improvement opportunities

Client Responsibilities

- Ensure pilot users have sufficient time allocated for training and testing
- Provide timely feedback and clarification during the pilot period
- Confirm whether any identified gaps are critical to go-live or can be addressed later

Deliverables

- Trained pilot users
- Validated workflows using client data
- Documented feedback and agreed actions

Stage 3: Self-Sufficiency & Sign-Off

Objective

To confirm that the client is capable of independently using the software for day-to-day estimating and is ready to progress to wider team rollout or the next engagement stage.

Required Skills & Capabilities

Before sign-off, pilot users must be able to demonstrate the ability to:

- Create and manage projects independently
- Import & work with 2D/3D files performing accurate quantity take-offs
- Build cost structures and apply rates both manually & using smart builder
- Generate estimates without assistance
- Produce and export reports relevant to their business needs

Self-Sufficiency Validation

Validation may include:

- Completion of a sample estimate end-to-end
- Review sessions with the onboarding team
- Confirmation that internal processes are documented and understood

Client Commitments

- Identify internal champions or super-users
- Ensure internal support processes are in place
- Confirm readiness for broader team training or rollout

Sign-Off Criteria

Both parties must agree that:

- Onboarding objectives have been met
- Pilot users are self-sufficient
- Any remaining gaps are documented and scheduled for future phases

Formal sign-off will confirm completion of onboarding and readiness to progress to the next stage.

Next steps

Upon successful sign-off, options may include:

- Wider team training
- Advanced or role-specific training
- Customisation or integration scoping
- Ongoing support and optimisation

These next steps will be discussed and agreed separately.

Training Module recommended roadmap: