



10 Software Pitfalls to Avoid

1. **Falling for the "magic bullet" pitch.** No single ERP will run purchasing, estimating, scheduling, and accounting flawlessly out of the box. Treat every "it does it all" claim as a starting point for questions, not a reason to sign.
2. **Trusting the polished demo.** A boardroom demo with perfect wifi isn't your jobsite. Ask the rep to make mistakes on purpose — override a budget, change a plan option midstream, schedule a trade out of sequence — and watch what breaks.
3. **Buying features instead of fit.** Flashy dashboards mean nothing if the system doesn't match how your estimators, purchasers, and supers actually work. Define your pain points before you tour a single feature list.
4. **Letting only leadership sit in on demos.** The people who'll live in the system daily — purchasing, accounting, field ops, warranty — need to test their own workflows and voice concerns before you buy.
5. **Skippping the "why are we really switching" audit.** If current software "isn't working," check your SOPs first. Many builders discover they're using 20% of a perfectly good system, not a broken one.
6. **Letting IT own the whole implementation.** IT should support the rollout, not run it. Operations needs to lead, or the system gets built around technical convenience instead of jobsite reality.
7. **Skippping a project champion.** Without one accountable internal owner driving decisions and communication, implementations stall the moment the initial excitement fades.
8. **Relying on one person to hold the system together.** Cross-train from day one. The moment only a single employee understands the setup, you're one resignation away from the whole thing unraveling.
9. **Rushing past sandbox testing and parallel runs.** Skipping test environments and running live before data integrity is verified turns go-live day into a live-fire experiment with real budgets and real homeowners.



10. **Going passive after launch.** Adoption dies when executive attention does. Ongoing cross-training, quarterly audits, and revisiting original goals are what keep a system alive instead of quietly fading into old habits.