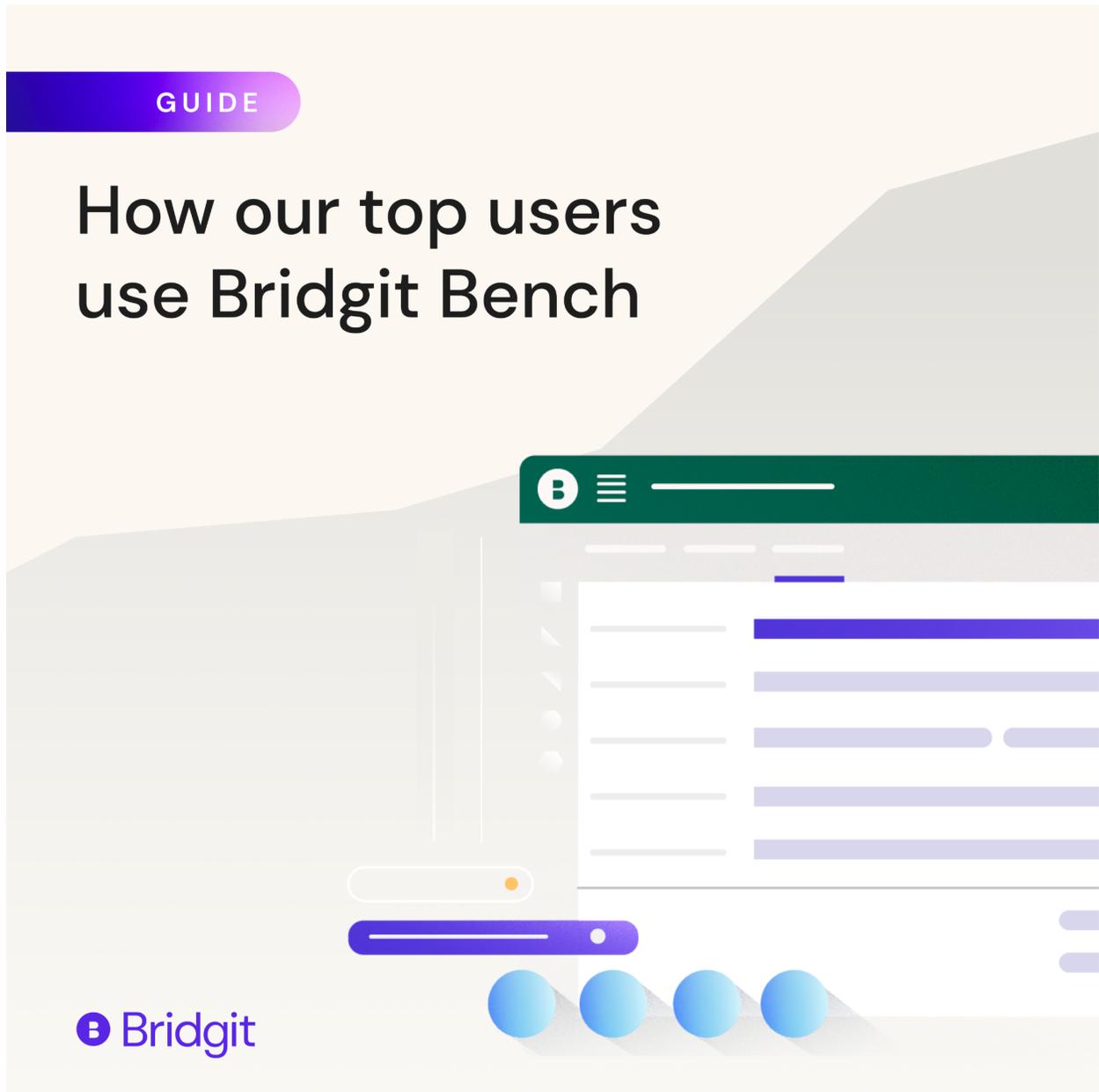


# How our top users use Bridgit Bench



GUIDE

## How our top users use Bridgit Bench

 Bridgit

## Make the most out of Bridgit Bench

Bridgit Bench has become an indispensable tool for our customers.

We've onboarded over 200 contractors.

As we helped them get the most out of the platform, we've seen new workflows emerge to meet complex needs.

We've seen what works and what doesn't.

Here are the best best practices we've seen across our customer base.

## A summary of what our best users are doing

1. They create a **Rules of Engagement** policy to control usage
2. They keep their **data** clean and consistent
3. They automate data transfers using **integrations**
4. They leverage **permissions** to give each user the right amount of access
5. They review **Bench Cost** to identify the cost of under-utilized workers
6. They use **forecasting** features to hone in on their long-term planning
7. They create **role templates** to set up projects quickly
8. They create **saved filters** to easily access relevant data
9. They use **phases** to organize and control their projects
10. They track and plan for their project bids with **Pursuit Tracking**
11. They group projects together for easy visualizations using **colors**
12. They export PDF **reports** when they need to take discussions offline
13. They track important role, people, and project information with **notes**
14. They use **Distance to Project** to find qualified people close to the job site

### For Bridgit Bench administrators, we recommend:

You create a **Rules of Engagement** policy to control usage

You keep your **data** clean and consistent

You automate data transfers using **integrations**

You leverage **permissions** to give each user the right amount of access

You create **role templates** to set up projects quickly

### For Bridgit Bench end users, we recommend:

You review **Bench Cost** to identify the cost of underutilized workers

You use **Forecasting** features to hone in on their long-term planning

You create **Saved Filters** to easily access relevant data

You use **Phases** to organize and control their projects

You track and plan for their project bids with **Pursuit Tracking**

You group projects together for easy visualizations using **colors**

You export PDF **reports** when they need to take discussions offline

You track important role, people, and project information with **Notes**

You use **Distance to Project** to find the best people closest to the job site

## Codify your process with a Rules of Engagement policy

You can do one thing ten ways given the level of flexibility in Bridgit Bench. Many customers create a Rules of Engagement policy to stay consistent.

The policy should include best practices, things to avoid, and other information your team needs to use Bridgit Bench effectively.

### What our customers cover in their Rules of Engagement policies:

1. Who should be using Bridgit Bench?
  - What should their access level be?
  - What are their responsibilities on the platform?
  - What is the step-by-step process for making changes?
  - Who should they contact if they run into trouble?
2. What data should be tracked and how?
  - What custom fields should be created and maintained?
  - Who is responsible for what data?
  - How should other software be [integrated into the platform](#)?
    - Who monitors the integrations and how often are the updates?
  - What are the standard allocation percentages for each role?
  - How should [project colors](#) be used and interpreted?
  - What are the rules for data entry? (ex. No abbreviations for titles)

[Here's a template](#) to get you started.

## Improve outcomes with clean and consistent data

To make the most of Bridgit Bench, our top users consistently keep their data clean. Clean data means information stays accurate and is easy to understand for all users.

Clean, consistent data also feeds into everything else you do on the platform. Integrating your tech stack into Bridgit Bench? Clean data will make it easier for information to transfer over.

## How our customers keep data clean

1. They specify data entry rules in their [Rules of Engagement](#) document, like
  - a. How often should you update information?
    - i. Who updates what information?
    - ii. How often should a piece of information be updated?
  - b. Should you use abbreviations for titles? (ex. Asst. Superintendent)
2. They keep the rules and processes consistent across platforms. Codify a set of rules for all the tools in your tech stack to make data management easier.
3. They check the data regularly. Top users avoid changing information in a vacuum. We see users set time aside to clean and review data holistically.

## Cut down on non-productive work with integrations

Our top users integrate Bridgit Bench with their tech stack. You can automatically pull project and/or people information, including custom fields.

Integrations are effective because they reduce the need to manually enter information stored in other software. Why add project information all over again when you can pull all of it directly from [Salesforce](#)?

Integrations help your team to get ahead on planning. That means penciling in people to projects early, and figuring out who you'll need to hire (long before you need to hire them).

Once a new project is created in your CRM or Project Planning tool, copy it over to Bridgit earlier in its lifecycle to get ahead of mapping out the project team.

## Ways to integrate with Bridgit Bench

1. Use our Workato integrations. Once you have your Workato account setup, check out our guide on how to integrate with Bridgit Bench [here](#).

2. Use our open API to build a custom integration. You can learn more by reading our documentation [here](#).

For more information regarding integration options, visit the [Bridgit Help Desk](#).

## Control access and usage with permissions

Permission groups are a key collaboration feature. Instead of having one person or group in charge of everything related to workforce management, you can have different groups with different permissions to do specific tasks in Bridgit Bench. It's a great way to get key parties to be part of the planning process, while saving others time by delegating work to project owners.

Our users take full advantage of permission groups, and tend to be similar in their approach. Here's a common way the standard permission groups are used:

1. There tend to be around two Administrators. Both are senior decision makers (ex. Operations Manager) who use Bridgit Bench regularly.
2. Most of the operations team is onboarded as a full contributor. Sometimes HR is a Full Contributor too, depending on their role in the process.
3. Anyone benefiting from tracking project progress tends to be View Only – like marketing, business development, or c-suite.

## Onboard specific groups using custom permissions

Human Resources – they tend to be able to update people, but not projects

	View All People and Roles	Manage People	Manage Roles	Manage Allocations	Manage Projects	View Private Fields	View Financial Fields
HR Not Assigned	✓	✓				✓	

Project Managers – they tend to be able to update projects, but not people

	View All People and Roles	Manage People	Manage Roles	Manage Allocations	Manage Projects	View Private Fields	View Financial Fields
Project Manager Not Assigned	✓		✓	✓	✓	✓	

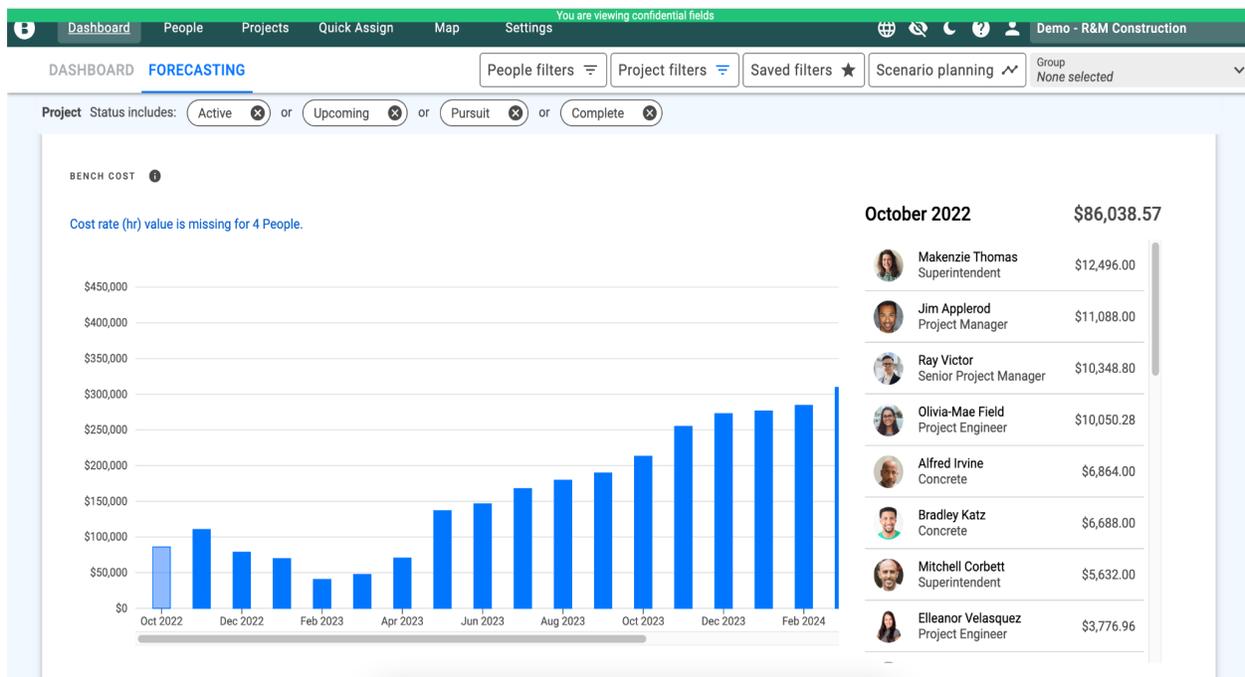
If you want a user to manage projects and add roles, but **not** have the ability to add allocations, you can create the following permissions group.

	View All People and Roles	Manage People	Manage Roles	Manage Allocations	Manage Projects	View Private Fields	View Financial Fields
Project Roles Not Assigned	✓		✓		✓		

Read our guides on [system permissions](#) and [custom permissions](#) to learn more.

## Understand your Bench Cost by tracking cost rate

The Bench Cost module helps you tie a dollar value to people who are sitting on the bench or are underutilized. It can help you make data-driven decisions about how to properly allocate staff. To use the Bench Cost, add a cost rate for each profile you're tracking. Then, scroll to the bottom of the forecasting tab. You'll find the chart there.



Here's another tip. At the bottom of the people tab in the settings page, you'll find a section where you can add cost rate defaults. That means for every title you've created in Bridgit Bench, you can add the average cost rate for the job. Those numbers will then directly feed into the chart.

The screenshot shows the 'Settings' page in the 'PEOPLE' tab. On the left, under 'Default Values', there is a section for 'Cost Rate (hr)' with 11 defaults. On the right, under 'Cost rate defaults', there is a table with the following data:

Title	Value
Assistant Superintendent	\$ 43
Carpenter	\$ 34
Concrete	\$ 34
Estimator	\$ 30
Project Engineer	\$ 78
Project Manager	\$ 80
Safety Coordinator	\$ 20

By using cost rate defaults, you get two benefits. Firstly, you don't have to go into each profile and update cost rates. Simply update the cost rate default for any title in the list. . Secondly, you can avoid adding real salary data into Bridgit Bench. Many of our customers prefer housing salary data separately, so cost rate defaults offer an easy alternative.

See our [Bench Cost guide](#) to learn how you can use it effectively.

## Optimize long-term planning with forecasting

The Strategic Workforce Plan Report and Utilization Rate Chart automatically update as you make changes to your people and projects. Our users leverage them to plan more effectively, and reduce the risk of last minute, panic decisions.

Use the Strategic Workforce Plan to track gaps in staff availability. Need to know how many superintendents you need in six months? This report can tell you.

Project Status includes: Active or Upcoming or Pursuit or Complete

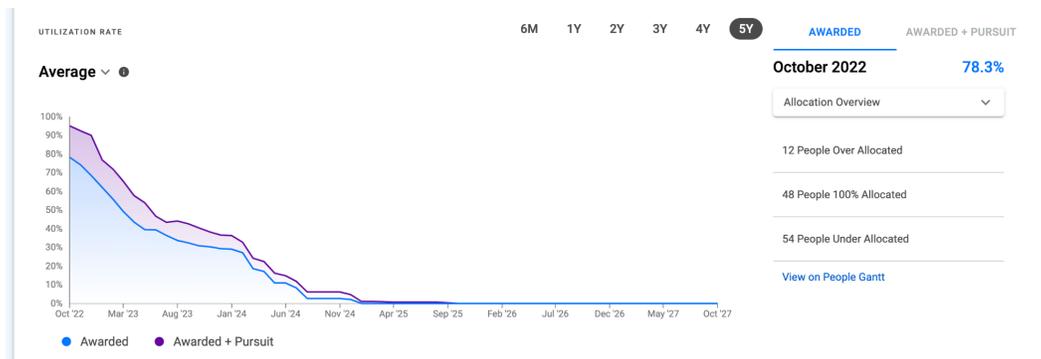
STRATEGIC WORKFORCE PLAN

6M 1Y 2Y 3Y 4Y 5Y

GRAPH TABLE

	2022			2023												2024
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
People	114.6	115	115	115	115	115	115	115	115	115	115	115	115	115	115	115
Project demand																
Awarded projects	100.7	94.5	89.2	84.7	78.7	72.4	65.8	61.1	61	57.6	53.1	48.5	45.7	45.1	44	43.6
Pursuit projects	47.1	52.6	54	43.6	44.2	46.6	41.7	42	34.5	33	40.9	38.8	35.7	28.3	27.2	27.2
Total demand	147.8	147.1	143.2	128.3	122.9	119	107.5	103.1	95.5	90.6	94	87.3	81.4	73.4	71.2	70.8
Rate	23.2	23.1	28.2	13.3	7.9	4	7.5	11.9	19.5	24.4	21	27.7	33.6	41.6	43.8	44.2

Use the Utilization Rate Chart to see long-term workforce productivity. Is your utilization rate going to plummet in six months? It's a good sign you need to start searching for new projects to keep your people busy.

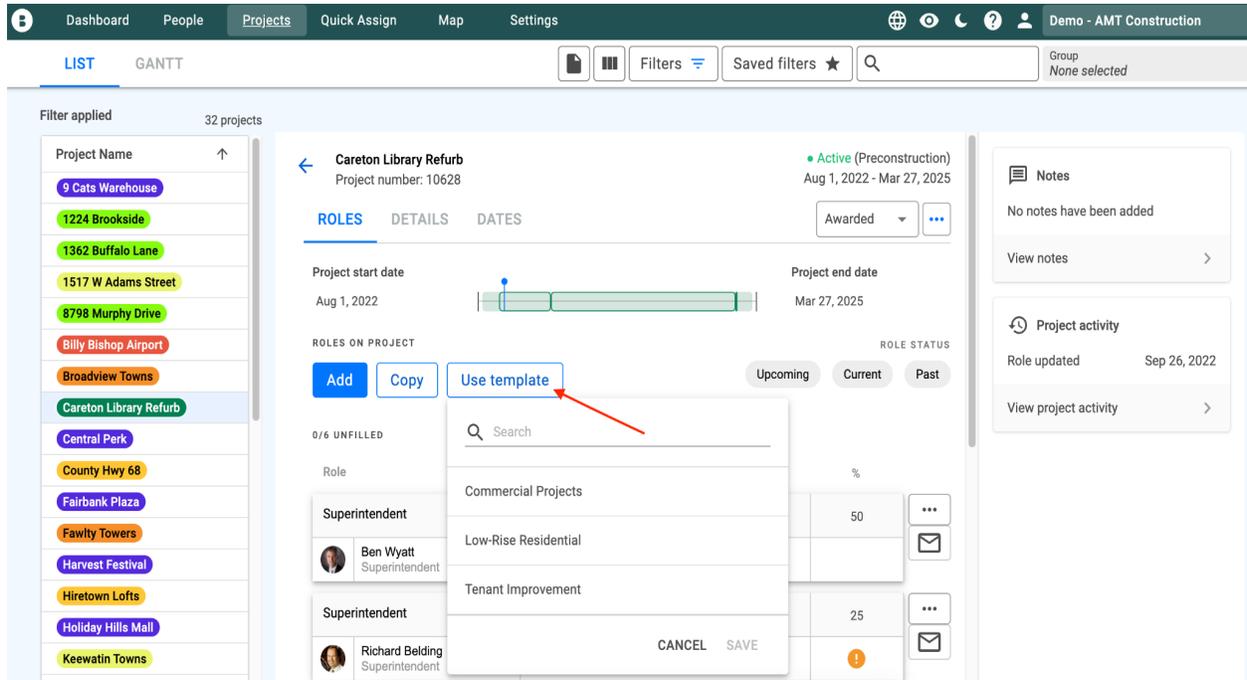


See our [forecasting guide](#) to learn how you can use the forecasting tab in Bridgit Bench to plan more effectively.

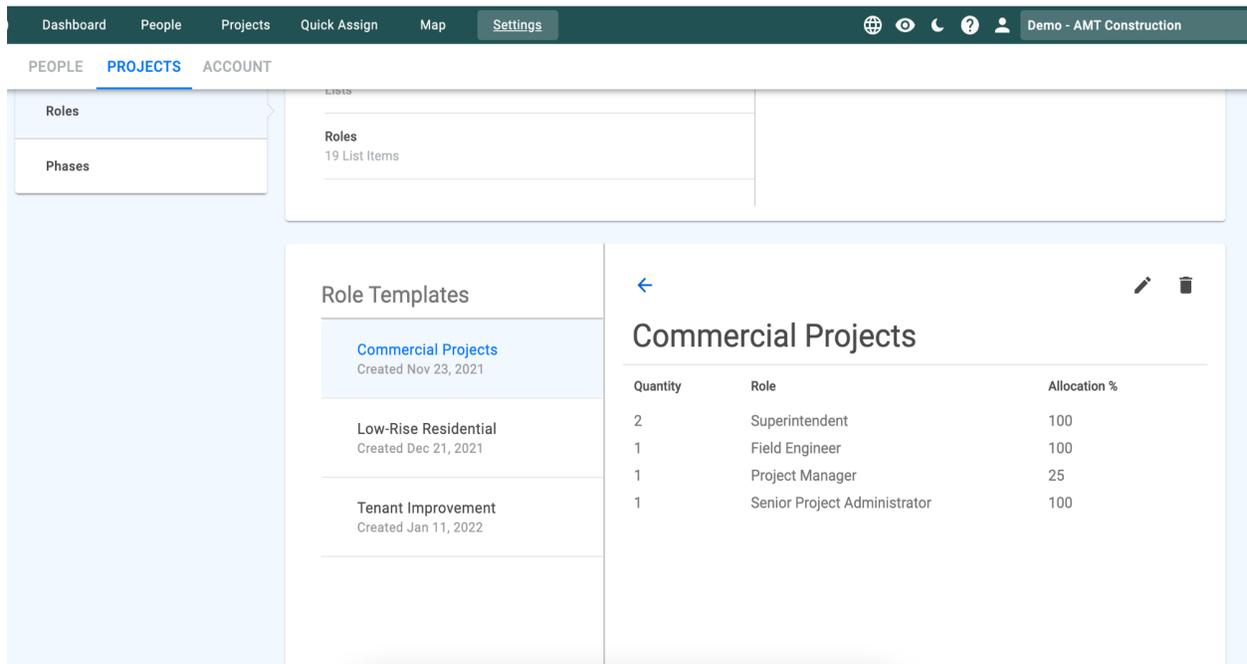
## Use role templates to set up your projects fast

Role templates are one of our most popular features. And it's not hard to see why. You can set up predefined lists of roles for projects and quickly add those roles to a project. For example, if you know that each residential project is going to have the same roles every time, you can set up a template for that.

Then, when you go to create a project, you can click on the 'Use template' button to access and select from a list of the templates. That'll automatically add all relevant roles to the project.



To get started on creating templates, go to the settings page. Then, under the projects tab, click on the roles tab. You'll be able to start creating templates there.



Read our [guide on role templates](#) to learn how to incorporate it in your workflow.

## Quickly access important data with saved filters

Saved filters lets you quickly sort for the information that you need. Our users are oftentimes looking for the same information whenever they access Bridgit Bench. Instead of having you set up your filters each time, saved filters is a way for you to get the information you're looking for quickly.

The first time you set up your filters, you'll see a star button on the left of the filter descriptions. If you click that button, you'll get a prompt to save that filter for next time. Then, click on the 'Saved filters' button next to filters to access them.

The screenshot shows the 'People' section of the Bridgit Bench interface. At the top, there are navigation tabs: Dashboard, People, Projects, Quick Assign, Map, and Settings. Below these, there are icons for document, list, filter, and star, along with a search bar and a 'Group' dropdown menu. The main content area displays a list of project managers with columns for Photo, Name, Title, Availability Until, and Current Project. A filter bar at the top of the list shows 'Title includes: Project Manager' and 'Availability includes: Available now'. A star icon is visible on the left side of the filter bar, and a red arrow points to it. A dropdown menu is open next to the star icon, showing 'LEED AP Certified' and a 'Manage saved filters' button. A red arrow also points to this button. The table lists four project managers: Carl Carlson, Cher Horowitz, Vivian Burton, and Xander Harris, all with the title 'Project Manager' and 25% availability.

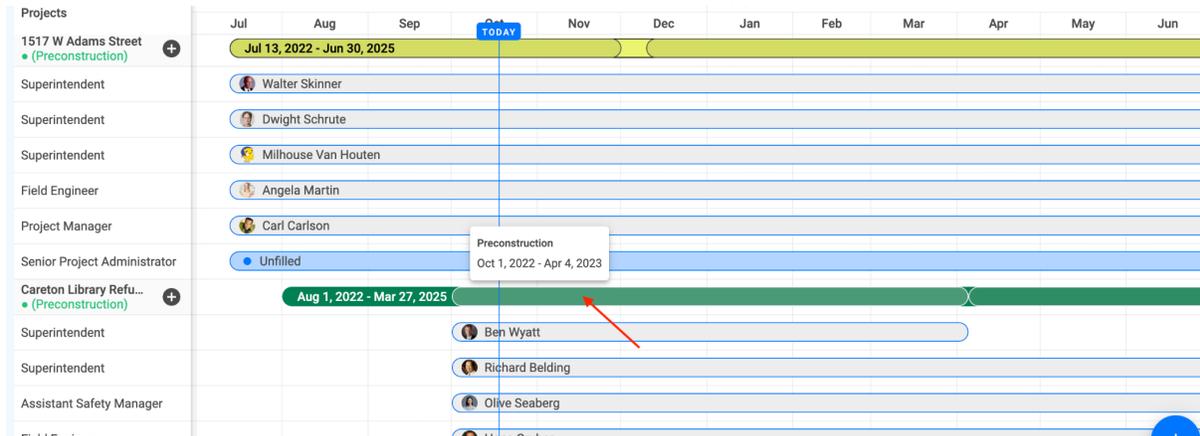
Photo	Name	Title	Availability Until	Current Project	Group
	Carl Carlson	Project Manager	25% Dec 6, 2024	1362 Buffalo Lane +2 more 9 Cats Warehouse	Midwest
	Cher Horowitz	Project Manager	25% Aug 29, 2025	Major Street Towers +1 more	West
	Vivian Burton	Project Manager	25% Jun 30, 2025	Portland International Airport +1 more	South, West
	Xander Harris	Project Manager	25% Mar 31, 2026	Markham Street Lofts	South

Learn how saved filters can make finding information easy by reading our guides on [people filters](#) and [project filters](#).

## Get granular in project control with phases

We see customers add project phases to create more fluidity in their project tracking and to allow for more flexible date shifting.

You can allocate team members directly to project phases and create custom allocations for those phase dates. A key benefit is being able to quickly select which project roles, phases, and project dates should be impacted when dates shift.



The phases we see most commonly tracked are:

1. Pre-construction
2. Construction
3. Closeout

Our customers keep it simple, and we'd recommend you do the same. Phases sort alphabetically, so if you want to sequence them, use numbers. For example:

- "01 - Precon"
- "02 - Construction"
- "03 - Closeout"

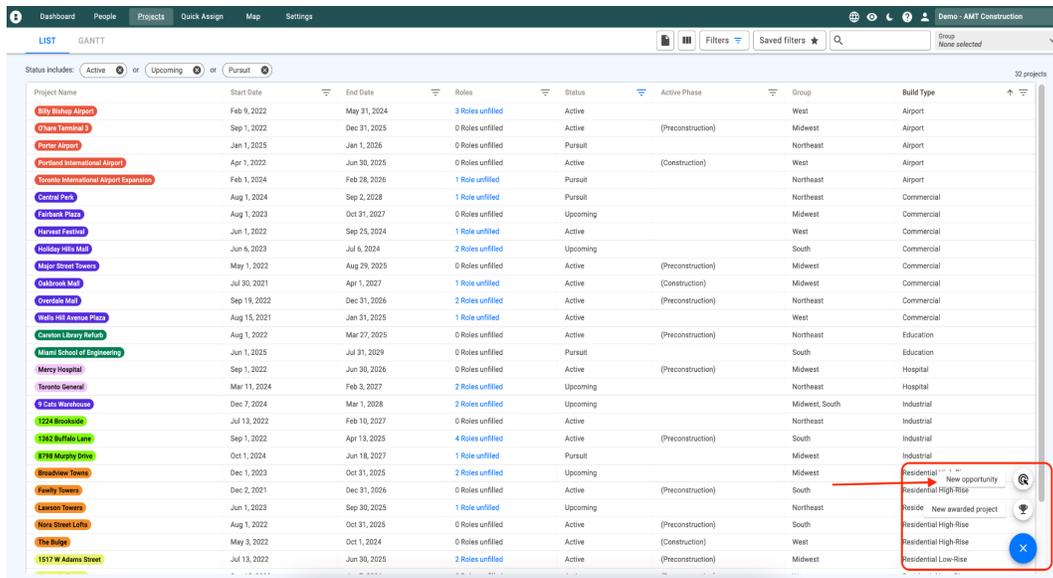
Read our support guides on how to [create phases](#), and [add phases to a new project](#) to get started.

## Use Pursuit Tracking to create winning teams for bids

Pursuit Tracking lets you add project bids and opportunities directly into Bridgit Bench. You can use project opportunities to pencil in a team for bids you're chasing.

Tracking project opportunities is a wildly popular feature in Bridgit Bench. We see top users onboarding their business development teams to drive better collaboration and put together stronger bids.

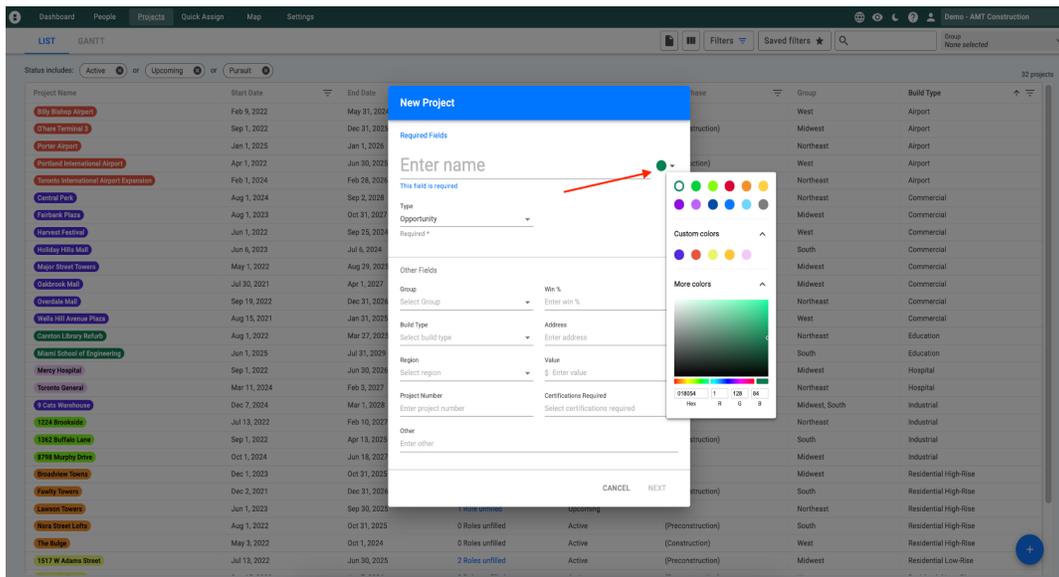
You can add a new opportunity in the new project screen. Click the Type dropdown and select Opportunity. This project will now be listed as a pursuit.



For more information, check out our guides on Pursuit Tracking [here](#).

## Visualize your project groupings with colors

When you create a new project, you can change the default green project color to something else. We see companies color projects in different types of groups.



Here are three common approaches to grouping projects:

### 1. Group by Building Type

For example - red is used for residential projects, blue for commercial

## 2. Group by Project Manager

For example – all of Gina’s projects are green, all of Bob’s are black

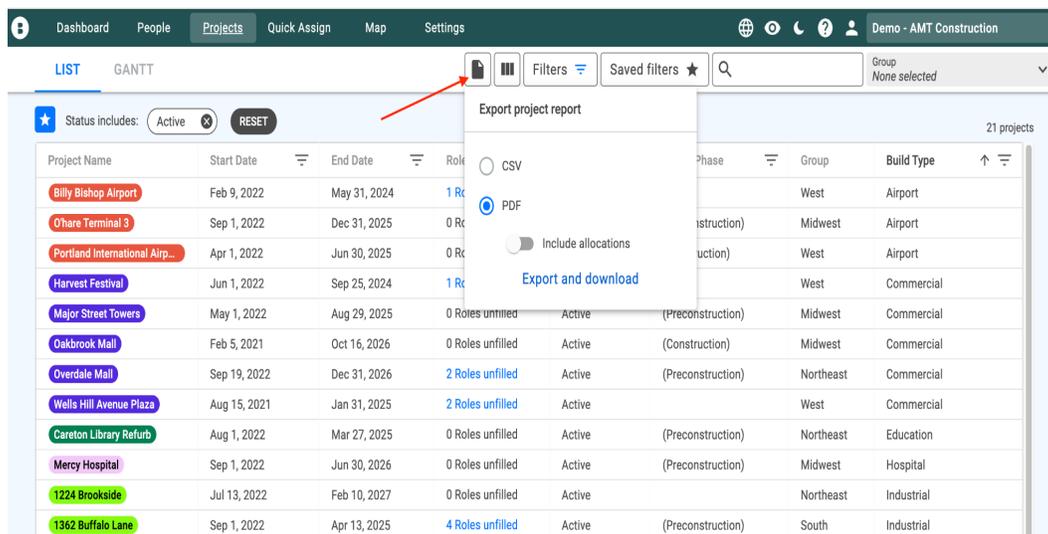
## 3. Group by Region

For example – projects in North East USA are purple, Texas projects are yellow

Don’t forget to include your color legend on your [rules of engagement](#).

## Share information offline with PDF and CSV exports

File exporting is a feature used by many of our power users. If you need to take your discussion offline, you can export information in both PDF and CSV formats. You can export both list views and Gantt views.



Project Name	Start Date	End Date	Roles	Phase	Group	Build Type
Billy Bishop Airport	Feb 9, 2022	May 31, 2024	1 Role	(Preconstruction)	West	Airport
O'hare Terminal 3	Sep 1, 2022	Dec 31, 2025	0 Roles	(Construction)	Midwest	Airport
Portland International Airp...	Apr 1, 2022	Jun 30, 2025	0 Roles	(Construction)	West	Airport
Harvest Festival	Jun 1, 2022	Sep 25, 2024	1 Role	(Preconstruction)	West	Commercial
Major Street Towers	May 1, 2022	Aug 29, 2025	0 Roles unfilled	(Preconstruction)	Midwest	Commercial
Oakbrook Mall	Feb 5, 2021	Oct 16, 2026	0 Roles unfilled	(Construction)	Midwest	Commercial
Overdale Mall	Sep 19, 2022	Dec 31, 2026	2 Roles unfilled	(Preconstruction)	Northeast	Commercial
Wells Hill Avenue Plaza	Aug 15, 2021	Jan 31, 2025	2 Roles unfilled	(Preconstruction)	West	Commercial
Careton Library Refurb	Aug 1, 2022	Mar 27, 2025	0 Roles unfilled	(Preconstruction)	Northeast	Education
Mercy Hospital	Sep 1, 2022	Jun 30, 2026	0 Roles unfilled	(Preconstruction)	Midwest	Hospital
1224 Brookside	Jul 13, 2022	Feb 10, 2027	0 Roles unfilled	(Preconstruction)	Northeast	Industrial
1362 Buffalo Lane	Sep 1, 2022	Apr 13, 2025	4 Roles unfilled	(Preconstruction)	South	Industrial

You can export filtered information in either PDF or CSV. The report will export the information that is showing on your screen, and can include allocation percentages too. Take your files offline, format it, analyze it and create reports in Excel.

	A	B	C	D	E	F
1	Name	Title	Issues	Availability until	Current project	Next project
2	Amanda Ali	Project Coordinator	FALSE	0%, 2021-06-16	500 Garden Way	400 King St. W
3	Anna Andersen	Safety Supervisor	FALSE	0%, 2022-10-02	Olive St. W	
4	Arthur Anton	Site Superintendent	FALSE	100%, 2021-05-31	Fallon Developments	Brynhurst Lofts
5	Bryan Banks	Safety Supervisor	FALSE	No availability	Duke St. Lofts	
6	Carlos Carr	Assistant Superintendent	FALSE	0%, 2026-04-02	Fallon Developments	
7	Celia Cann	Safety Supervisor	FALSE	100%, 2021-08-31	500 Garden Way	400 King St. W
8	Christina Cruz	Sr. Project Manager	TRUE	0%, 2023-09-01	Duke St. Lofts	400 King St. W, 400 King St. W
9	Cynthia Palmore	Site Superi				
10	Devin Douglas	Sr. Project				
11	Edward Jones	Jr. Project I				
12	Elizabeth East	Safety Sup				
13	Fabian Fosterson	Assistant S				
14	Frank Paul	Safety Sup				
15	George Gallenger	Jr. Project I				
16	Gregory Gerald	Safety Sup				
17	Jack Jacobson	Safety Sup				
18	Jessie Charles	Safety Sup				
19	Jordain Sheffield	Assistant P				
20	Laura Derksen	Jr. Project I				
21	Laurie Derksen	Project Coc				
22	Louis Raymond Lewis-Johnston	Safety Sup				
23	Lydla Lau	Assistant S				
24	Mark Maloney	Assistant P				
25	Marqui Dixon	Sr. Project				
26	Morgan Jones-Jacobs	Safety Sup				
27	Morgan McDonald	Sr. Project				
28	Oliver Jones	Jr. Project I				
29	Oliver Jones	Site Superi				
30	Raki Ramore	Safety Sup				
31	Rob Shneider	Assistant S				
32	Sarah Connally	Sr. Project				
33	Simon Jones	Carpentry S				
34	Simon Martinez	Project Coc				
35	Simon Smith	Safety Sup				
36	Tara Tores	Sr. Project				
37	Tony Tamoko	Jr. Project I				
38	Viktor Vonn	Site Superi				
39						

**Laura's Account** May 26, 2021

People Report

Name	Issues	Availability until
<b>Amanda Ali</b> Project Coordinator Available in 22 days	No	0%, Jun 16, 2021
Current project 500 Garden Way		Next project 400 King St. W

**Project Allocations** No allocation issues

Active (1)

- 500 Garden Way  
Heavy Equipment Operator  
Apr 01, 2021 - Jun 16, 2021 100%

Upcoming (1)

- 400 King St. W  
Project Coordinator  
Sep 01, 2021 - Sep 01, 2023 100%

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Name	Issues	Availability until
<b>Anna Andersen</b> Safety Supervisor Available in 16 months, 8 days	No	0%, Oct 2, 2022
Current project Olive St. W		Next project -

**Project Allocations** No allocation issues

Active (1)

- Olive St. W  
Engineer  
Mar 17, 2021 - Oct 02, 2022 100%

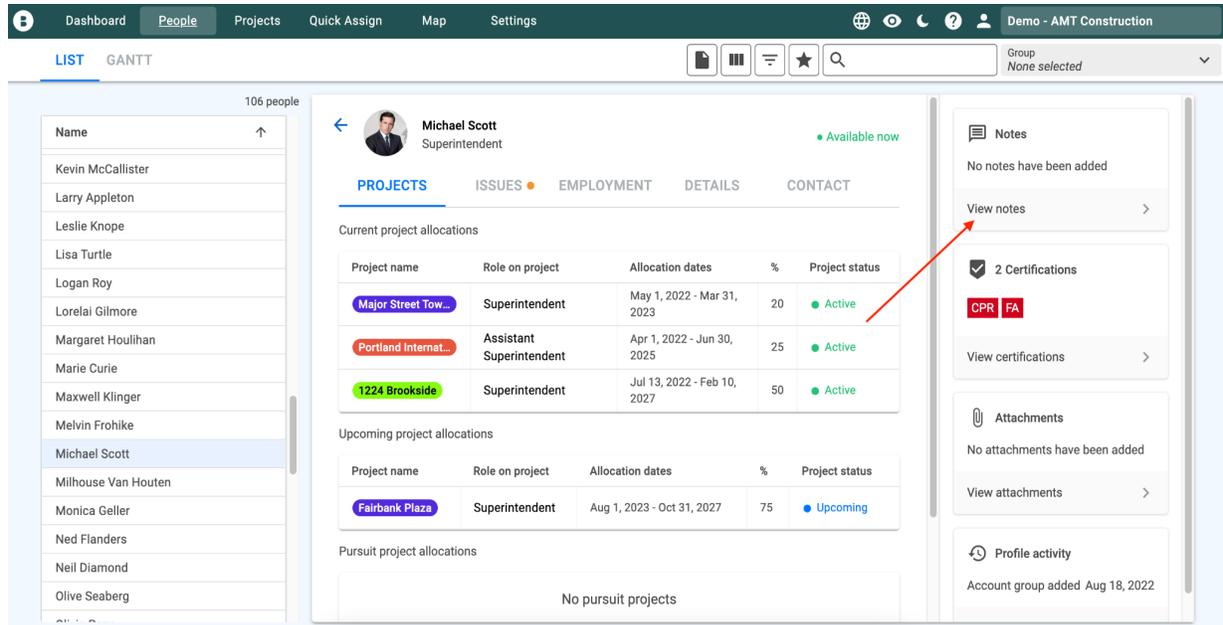
Check out our guides on pulling reports from the [People list](#) and [Project list](#) for more information.

## Use notes to keep track of important information

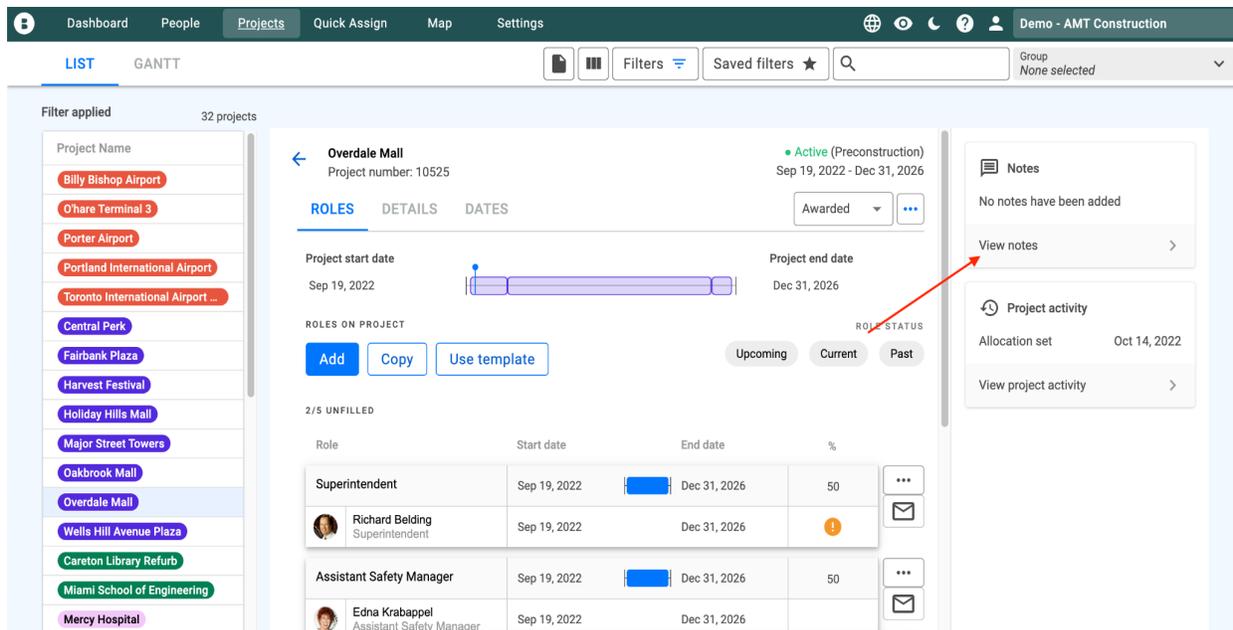
You can add notes to roles, people, and projects. Our customers use role notes for content like what location the role needs to be in or whether they're a new hire.

The screenshot shows a software interface for project management. At the top, there's a navigation bar with options like 'Dashboard', 'People', 'Projects', 'Quick Assign', 'Map', and 'Settings'. Below this, there's a 'LIST' and 'GANTT' view selector. The main content area is titled 'Filter applied' and shows 32 projects. A list of projects is on the left, with 'Wells Hill Avenue Plaza' selected. The main panel displays details for this project, including its name, number (10514), and dates (Aug 15, 2021 - Jan 31, 2025). There are tabs for 'ROLES', 'DETAILS', and 'DATES'. The 'ROLES' tab is active, showing a table of roles. A red box highlights the 'Superintendent' role, and a red arrow points to a note icon next to it. The right sidebar contains sections for 'Notes', 'Project activity', and 'View project activity'.

People notes are located on the sidebar panel in the People details. People notes are generally used for a wide range of specific details like relocation details, project information, promotions, certification statuses, or education.



You can find a sidebar panel for Project notes in a project's details section. Leave notes on project specific details that you'd like everyone to know. These sections can be used to share changes, delays, and other project-specific information.



## Shorten commutes by placing your team on nearby projects

Having your people commute long distances to get to a job site is inconvenient and not always ideal. The 'Distance from Project' feature allows our users to choose people who are close to a site to reduce commute times, and increase employee satisfaction. When you go to place a person on a project, you can see how far someone lives from the job site.

The screenshot shows the 'Place a person' dialog in a software interface. The dialog displays a table of people with their names, roles, and distances from a project. A tooltip points to the distance column, stating 'This is the distance between the project address and a person's home address.' The project address is '6301 Silver Dart Dr, Mississauga, ON L5P 1B2, Canada'. The table lists three people: Cordelia Chase (319 mi), J.D. Dorian (346 mi), and Jessie Spano (353 mi). A slider for 'Distance from project' is set to '150+ mi'. The dialog also shows filters for 'Has availability between' (Feb 1, 2024 - Feb 28, 2026) and 'Title includes' (Assistant Project Manager).

Name	Time Availability	mi
Cordelia Chase Assistant Project M... On 1 pursuit		319
J.D. Dorian Assistant Project M...		346
Jessie Spano Assistant Project M...		353

To use this feature, you need to add in the home addresses of all of your employees, and the job site address for each of your projects. Bridgit Bench will do all the math, and show you how far someone lives from the site.

The screenshot shows a software interface with a dark green top navigation bar containing 'Dashboard', 'People', 'Projects', 'Quick Assign', 'Map', and 'Settings'. On the right of the bar are icons for globe, eye, moon, question mark, and user profile, along with the text 'Demo - AMT Construction'. Below the bar, there are tabs for 'LIST' and 'GANTT', and a search bar with a magnifying glass icon. A dropdown menu shows 'Group' and 'None selected'. The main content area is divided into three sections. On the left is a list of 106 people, with 'Chandler Bing' highlighted. The middle section shows the profile for Chandler Bing, a Project Executive, with tabs for 'PROJECTS', 'ISSUES', 'EMPLOYMENT', 'DETAILS', and 'CONTACT'. The 'DETAILS' tab is active, showing fields for Group (Midwest), Title (Project Executive), Cost Rate (hr) (Hidden field), Hourly Wage Rate (Hidden field), Salary (Hidden field), Region (Midwest), Unique Identifier (chandler@gmail.com), Home Address (55416), Employee ID (425), Skill Set (-), and Willing to Travel (checked). A red arrow points to the '55416' value. The right section contains 'Notes', '2 Certifications' (including 'H&S 75 days 01'), 'Attachments', and 'Profile activity' (Certification added Oct 6, 2022).

To learn more, read our [Distance From Project](#) guide.

Are you doing something that should be added to this list? Contact us at [updates@gobridgit.com](mailto:updates@gobridgit.com) and let us know.