Construction Quarterly

Driving Value Through AI Implementation

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forvis mazars

How Construction Companies Can Move From Planning to Execution

Most contractors have gotten the message: artificial intelligence (AI) is here, and it's here to stay. But one question remains: Where do we start?

Implementing AI can feel like a significant hurdle for contractors who are constantly managing financial pressures, labor challenges, and uneven demand across sectors. Not only are AI tools relatively new, but they're also largely untested in the industry, leaving many contractors feeling like they're in uncharted waters. Yet companies that successfully adopt AI may see meaningful gains in efficiency and productivity, which can translate into long-term value.

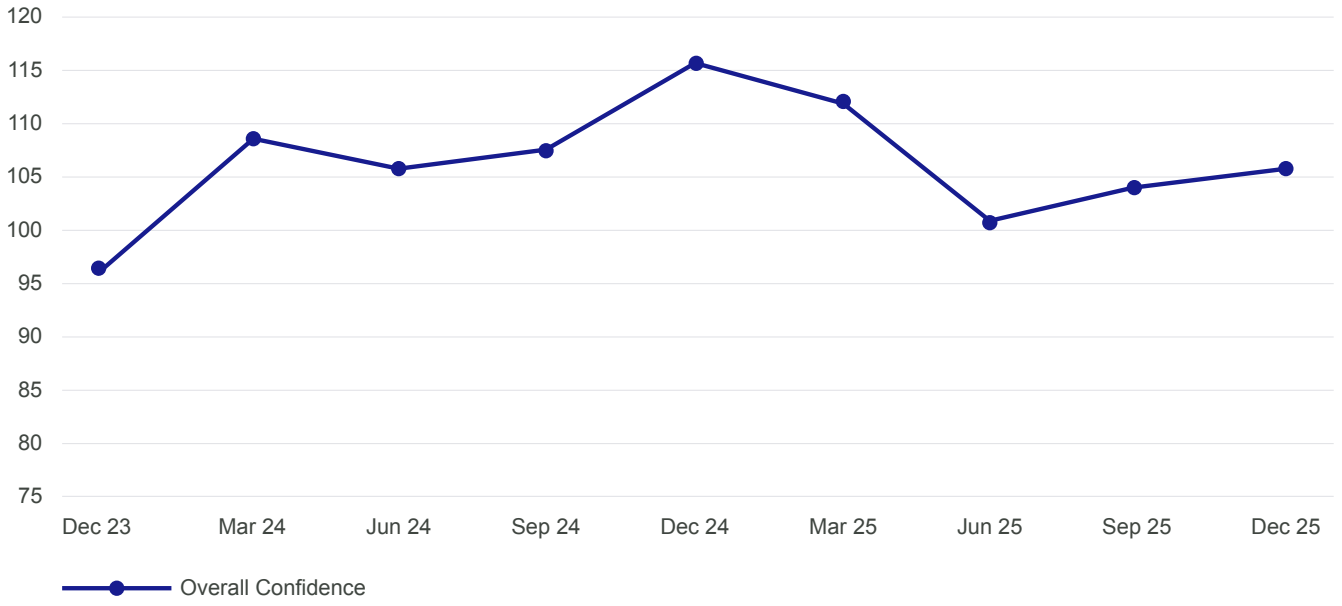
Technology can deliver real results—but only when it's implemented thoughtfully.

Last quarter, we examined how to build a strong foundation for innovation. Now, we're shifting our focus to execution. This quarter, we will explore how contractors can implement and optimize AI solutions in a structured, sustainable way—and how they can approach it responsibly.

Contractors May Need to Shift the Conversation Around AI

The Construction Financial Management Association (CFMA) seeks to track industry sentiment over time. This quarter's report didn't change much from the last one. We appear to be in a holding pattern, where financing is available but expensive; where projects are being presented, but not across all sectors; and where the labor market is predictable, but predictably short. Still, overall confidence remains slightly positive.

Overall CONFINDEX Confidence Index



To us, one of the most useful aspects of the CONFINDEX report isn't the numbers—it's the comments section. Construction company leaders are free to share their thoughts on materials prices, labor shortages, and other areas of concern. This month, we wanted to see how they were feeling about AI.

Many respondents appeared eager and ready to implement new solutions. One commenter noted that the industry is "slow to embrace and adopt new technologies" and expressed a desire to accelerate AI adoption.

While that enthusiasm is encouraging, the focus shouldn't be on AI adoption alone. The real goal should be building systems that are more efficient, more accurate, and better aligned with business needs.

In other words, contractors shouldn't implement AI just for the sake of it. The solutions should be applied where they make sense—where they can deliver true value.

In last quarter's report, we examined the theory behind thoughtful AI adoption. With this in mind, let's look at how it works in practice by exploring real-world situations where AI has helped contractors solve specific problems.

Practical Use Cases for AI

The Forvis Mazars Technology Consulting Group has worked with many contractors to improve workflows through automation. By sharing these case studies, our goal is to show that AI doesn't have to be overwhelming. Many solutions are simple, quick to implement, and capable of delivering almost instantaneous value.

HR Chatbot

Grab the Low-Hanging Fruit

One of the simplest entry points into AI is an internal HR chatbot. This technology works by training the chatbot on company documents—think codes of conduct, safety manuals, employee handbooks, and employment policies. Instead of calling the office or searching emails for the right PDF, employees can ask the chatbot questions like:

- "How many days of PTO do I have?"
- "What's the safety protocol in this situation?"
- "Who should I contact if I suspect my manager is falsifying records?"

This solution is simple, but it's effective. It can reduce the burden on HR teams and improve response times. And because the chatbot is trained using only the company's internal policies, there's little risk it will supply misleading or incorrect information.

Automated Lien Waiver Processing

Free Up Time for Higher-Value Work

Lien waivers are an essential part of any construction project, but manually processing them can create administrative bottlenecks for contractors. In one case where a contractor had hundreds of lien waivers to process by hand, our team implemented an AI solution that could review incoming waivers, extract key information, and digitally file the signed documents.

To automate the workflow, we used a combination of AI and non-AI technologies. Over the course of one construction project, the client saved hundreds of hours, freeing up staff to focus on work that moved the project forward.

Automated Drawing Extraction

Eliminate Repetitive Tasks

We engaged with another client on a project that required them to review and extract information from large sets of design drawings—sometimes hundreds of pages at a time. An employee had been manually saving each drawing as a separate file and extracting key data, which was repetitive and time-consuming.

The AI-enabled solution did a few things:

- It extracted each drawing from the document.
- It saved them as individual files.
- It created metadata so the drawings could be better organized and more easily searched.

This eliminated a manual process and improved how project documents were stored and accessed, saving time and reducing risk of missing key information.

These examples show that AI doesn't have to be complex or disruptive to deliver value. Many successful initiatives start small by automating a single manual process. This is why a sustainable AI strategy follows a structured path: implement solutions only once you've identified the right use case, prepare your organization for change, and put safeguards in place to protect your systems and data.

Implement New AI Technologies — Safely

Last quarter, we introduced the first two steps in our four-step process of technology adoption: Strategize and Prepare. This quarter, we want to finish walking you through the process by exploring ways to implement AI, and how to help ensure that your systems are protected while doing so.

Last Quarter's Report:

1 **Strategize**

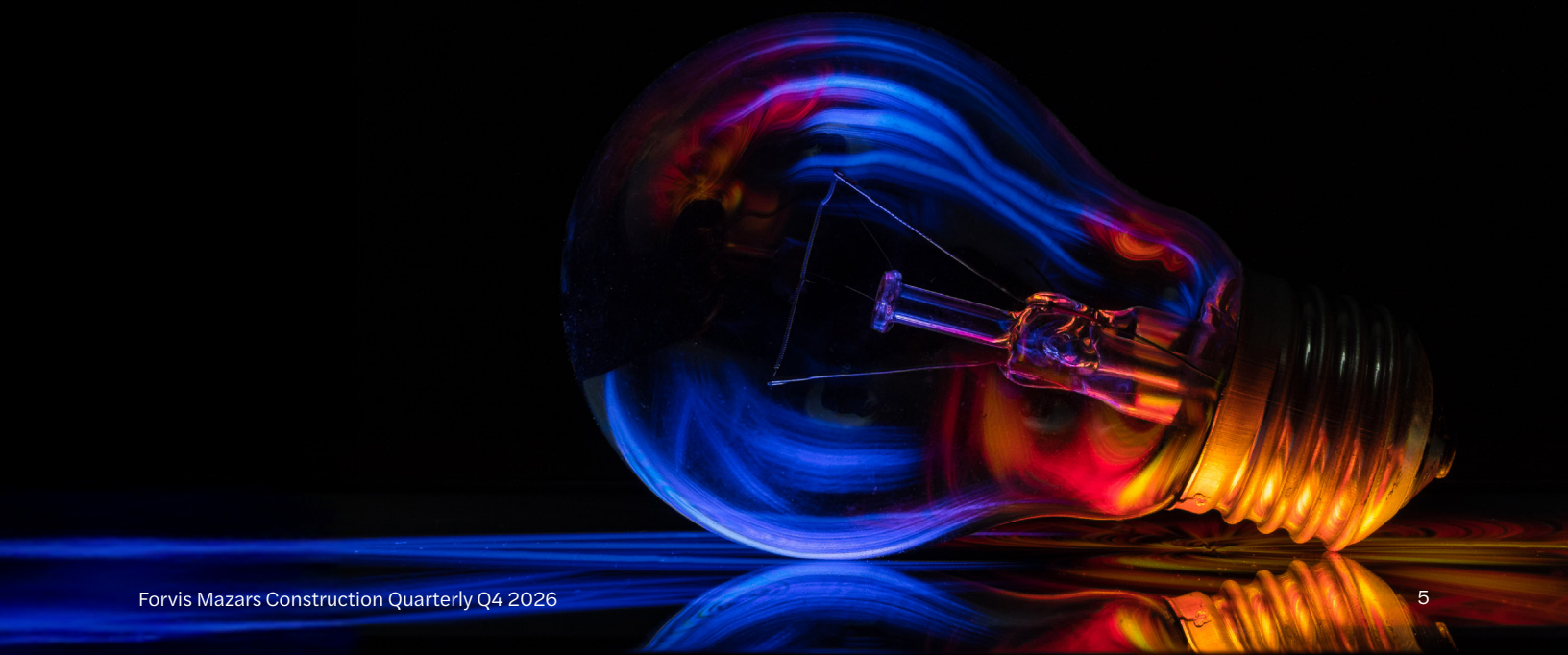
2 **Prepare**

In This Quarter's Report:

3 **Protect & Contol**

4 **Implement & Optimize**

In this quarter's report, we want to focus on steps three and four, Protect & Control, and Implement & Optimize. Steps one and two were covered in last quarter's report.



Step 3
Protect & Control

Before implementing new technology, contractors need to establish the right guardrails. AI tools can move quickly, but without clear policies, training, and oversight, that speed can introduce unnecessary risk. Putting controls in place early, before implementation, helps ensure AI is used safely and responsibly and remains aligned with company goals.

Train Users on Responsible AI Use

Employees should understand what AI can do—and what it can't. Training should cover how to use the technology, how to protect data while using it, and how to check the accuracy of AI-generated outputs. Even simple tools can pose security risks without proper training.

Establish Oversight & Governance

Assign ownership over each AI initiative. While some companies want to centralize ownership within the IT department, others distribute that responsibility across teams. Whichever approach you choose, consider implementing some of the following controls:

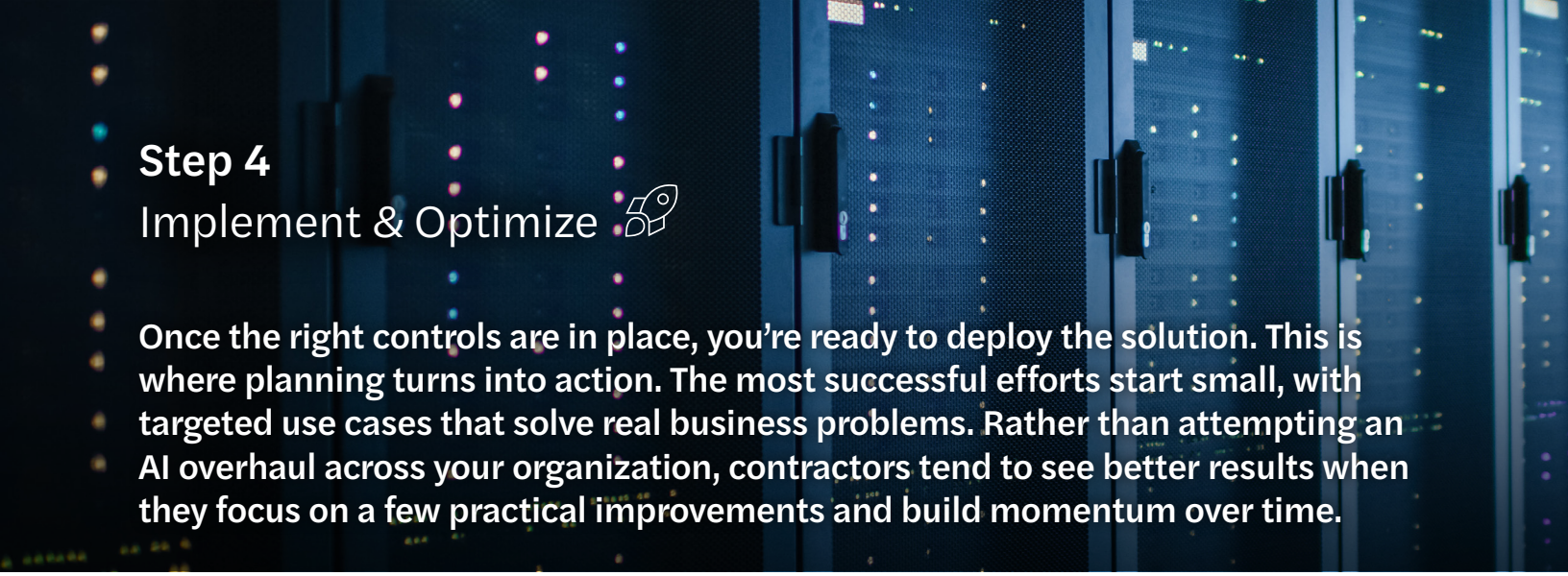
- **Create an approved list of AI tools**. List what solutions employees can use and which are prohibited.
- **Require humans to review key outputs.** AI-generated content or calculations should be verified by a qualified employee, preferably one who understands how the process would be performed manually.
- **Document AI-enabled processes**. If a workflow uses AI, flag that workflow for the reviewer. The reviewer should understand how the output is generated, what data it uses, and how to check for errors.
- **Update existing policies and procedures.** Rather than creating a standalone AI policy, incorporate AI usage into policies you already have. For example, you can update your document retention policy to clarify how AI-generated documents should be stored and labeled, or update policies to outline when AI tools can be used in your vendor approval process.

Protect Company & Customer Data

Task your IT team with protecting the company's data. They can extend data protections to AI systems that you adopt, which might look like:

- Defining what types of information can be used to train or interact with AI systems
- Requiring vendors and other third parties to follow the same data protection protocols as your employees
- Limiting access to AI tools and data sets based on employee roles

In addition, double down on protecting the sensitive information that you already have so that financial information, payroll data, or project specs are only available to those who truly need them. This helps preserve the integrity of the data that your AI systems rely on.



Step 4
Implement & Optimize

Once the right controls are in place, you're ready to deploy the solution. This is where planning turns into action. The most successful efforts start small, with targeted use cases that solve real business problems. Rather than attempting an AI overhaul across your organization, contractors tend to see better results when they focus on a few practical improvements and build momentum over time.

Identifying the Right Processes
Key Considerations

Find the Right Process to Automate

Repetitiveness

Processes that involve repetitive tasks.

Error Prone

Process is prone to human error.

Volume

Processes that are performed frequently by multiple individuals.

Employee Impact

Process impact the roles and responsibilities of employees.

Cost Savings

Process has high potential cost savings from automating a process.

Scalability

Process needs to scale as the business grows.

Find the Right Use Case

Focus on the low-hanging fruit first. Fix the most obvious pain points before you move on to more complex problems. Not only does this help ensure your employees have time to understand the new processes, but it also gives you time to confirm that the AI solution is the right one. If, over time, you find that a solution you implemented isn't working well, you'll have the bandwidth to fix the problem or find a new approach.

A great place to start is by looking at manual processes. How can you automate some of these routine tasks? AI and non-AI solutions can make quick work of this.

Another place to look is where the bulk of your staff hours are spent. Is that in data entry? Reconciliation? Filing? Focusing on lessening the burden on your already overworked workforce can pay dividends.

Step 4
Implement & Optimize

Measure the Value

How do you know that your AI system is working, much less working effectively? AI initiatives need to be evaluated, just like any other investment. Consider looking at some of the following metrics:

- Staff hours saved
- Length of payment cycles
- Number of errors

Tracking these outcomes demonstrates the return on investment (ROI), which supports future technology decisions and builds momentum and confidence in the AI investments made. Over time, this ROI should be reflected in your financials, as well. In the meantime, you may be able to point to nonfinancial ROIs, which can be just as effective.

Build Momentum

Starting with simple solutions makes it easier for employees to engage with the new tools and see the benefits firsthand. These wins may also encourage employees to suggest additional improvements—possibly options that hadn't been considered by the management team.

In addition, remember that most technology solutions aren't powered by AI alone. In many cases, the biggest efficiency gains come from combining multiple tools. For example, consider an automated invoice processing workflow.

1. Subcontractors submit invoices in a variety of formats. Optical character recognition (OCR) tools read those invoices and extract the data.
2. Robotic processing automation (RPA) uses that information to book the entry, match it to purchase orders, and route it to the appropriate manager for approval.
3. AI flags unusual charges, identifies duplicate invoices, and spots trends across unrelated projects.

Each piece of technology serves a different purpose, but together they build more streamlined workflows that help to save you time and improve accuracy.

From Strategy to Action

The contractors seeing the greatest benefit from AI aren't the ones chasing every new tool. They're the ones taking a structured, practical approach to implementation.

And fortunately, following a well-defined implementation plan doesn't have to be a complex, drawn-out process. Many contractors are starting small, taking calculated risks, and building momentum through incremental improvements over time.

These changes don't just improve day-to-day operations—they can help increase the long-term value of your business. Contractors who make the leap into AI may be more efficient, more scalable, and more attractive to buyers—but only if they do it right.

Future-readying your business with AI doesn't require a massive overhaul. It starts with one practical step at a time.

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