

MODELOGIX DEMONSTRATION CHECKLIST

REQUIRED

- ✓ Clean up Modelogix demo database removing content from older demos
- ✓ Ensure software is working properly the day if not hour before the demo
- ✓ Practice, Practice, Practice

OPTIONAL

- ✓ Download prospect's Logo, Buildings, etc., and add them as attachments to demo projects and models
- ✓ Change names/locations of projects in database to relate to prospect
- ✓ Import any customer data given to you by customer prior to demo
- ✓ Prepare Vico and/or Prolog data for import/export (if relevant for customer)

MODELOGIX PRODUCT INTRO (IF NECESSARY)

INTRODUCTION OF VALUE PROPOSITION TO PROSPECT

Ask the prospect these types of questions to illicit thought/interest:

- How often are you asked by an owner for a preliminary budget in the absence of detailed design and scope? If you are able to respond, how long does it take you and how accurate do you feel the budget really is?
- How well does your company leverage its ongoing investment in both creating project budgets / detailed estimates?
- What is your organization's annual overhead for managing projects to completion?
- Does your company benchmark the detailed final estimate prior to communicating that final number to the owner?

HIGH LEVEL FEATURE/BENEFIT INTRO

Modelogix enables users to:

- Centralize and secure their past project cost history within the Modelogix database
- Search for estimates by key their cost driving attributes
- Create quick and accurate conceptual estimates for customers by combining historical data with analytics

- Produce professional reports and presentations that outline the details of the conceptual estimate for owners
- Use their cost models to benchmark their detailed final estimates, identifying any omissions or errors
- Analyze their data based on any number of user defined work-breakdown structures

BEFORE WE TAKE A LOOK, SOME TECHNICAL BACKGROUND (DEP. ON AUDIENCE):

- Modelogix is a stand-alone application – does not require the use of WinEst estimating Can accept data from any source as long as that data can be published to Excel
- Modelogix is a desktop application that runs on the Windows OS
- The database engine for Modelogix is MS SQL
- Space requirements is dependent on the number of estimates, but most importantly the number of attached documents
- Offered only as a locally hosted solution (i.e. no cloud option)
- Users within an organization collaborate by (accessing/writing to/reading from) a centralized Modelogix database, allowing for users to work together on the same data in real-time

MODELOGIX SOFTWARE DEMONSTRATION

LEGEND

TOPIC	SPECIFIC SECTION OF DEMO
SUBTOPIC	FEATURE WITHIN APP
DISTINCT USER ACTION	CLICK HERE, OPEN THIS, DRAG THIS ITEM
Supporting Dialogue	Explain this, reference that, go into detail about this

DEMONSTRATION SCRIPT

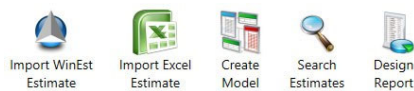
LOGIN

- **OPEN MODELOGIX APPLICATION**
- Explain how the prepopulated address is the address to access the centrally accessible Modelogix database, **CLICK CONNECT**
 - This is a good opportunity to reiterate the collaborative nature of the software
- Talk about how each user is given a unique username and password and how users are created by the system admin

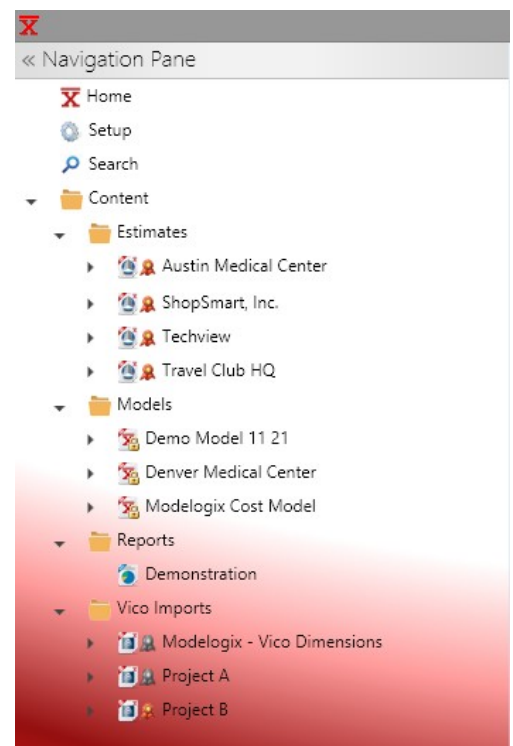
- A good opportunity to talk about how the licensing is concurrent usage (this benefits the customer)
- Explain how you are logging in as an admin for the demo but there are two different user types
 - Admin – Power user, system setup, data creator
 - User – Day to day user, data consumer
- **CLICK LOGIN**

INTRODUCING THE HOME PAGE/INTERFACE

- First thing is to mention that you are now at the Modelogix home page
- Immediately thereafter, Stress the ease of use and intuitive interface design
- Talk about the five most common tasks in the system being available at top of the home page



- Import from WinEst (Trimble’s detailed estimating tool)
 - Import from Excel (allowing you to import from any 3rd party estimating tool)
 - Create model
 - Search estimates
 - Design reports
- Introduce the navigation bar on left
 - **HOVER OVER** sections below
 - Home page is where you are now
 - Setup is where a system administrator sets up the Modelogix System initially and ongoing
 - Search is where users can search their Modelogix database of project by key cost driving attributes
 - Below that is all of the users “content” in the system. Mention the folder structure is customizable
 - **EXPAND ESTIMATES/PROJECTS FOLDER**
 - *Here’s an example of all of the past project data being stored in an estimates folder*
 - **EXPAND MODELS FOLDER**
 - *Here’s an example of all of the cost models created in the system*
 - **EXPAND REPORTS FOLDER**
 - *Here are all of the reports templates created in the system*



CREATING A CONCEPTUAL ESTIMATE BASED ON LIMITED SCOPE

Now that we're comfortable logging in to the system and have seen how some of the navigation works, let's walk through a common day to day workflow in the Modelogix software from an end user perspective. We will spend a little time at the end of this demonstration in the setup section, discussing some of the tools available to an administrator, but for this demonstration we will focus on the core function of the software, which is to create a conceptual estimate based on limited scope.

CLICK ON SETUP ...So let's assume for the purpose of this workflow demonstration, all of the system setup has been completed, which can include activities like:

- **CLICK ON SMART CATEGORIES** ...Setting up "smart categories" or cost driving attributes for your project data
- **CLICK ON WBS TABLES** ...Customizing work breakdown structures to best match your company's cost data structure
- **EXPAND AND HOVER OVER ESTIMATES OR PROJECTS IN THE SYSTEM** ...Importing project data for use in creating conceptual models
- **CLICK ON COST INDICES** ...Creating cost indexes to account for inflation or regional cost differences

Setup

Cost Indices Markups Metrics Options **Smart Categories** Units Users WBS Tables

Smart Categories

1. Industry Segment

Healthcare

- Interior GSF
- Number of Floors?
- Number of beds?
- Exterior Shell Material?
- Building Footprint
- Contact Area of Exterior Shell?
- Ratio of Shell Surface Area to Building Footprint?

Includes Parking Structure?

No

Yes

- How Many Floors?
- How Many Floors Below Grade?
- Total Number of Parking Spaces

Corporate Office

- SF of Conference / Meeting Rooms?
- Interior GSF?
- Building Footprint?
- Exterior Shell Material?

Retail

Add Smart Category

Setup

Cost Indices Markups Metrics Options Smart Categories Units Users **WBS Tables**

Table	Code	Name
Division	1000	General Conditions
Major	2000	Sitework
Minor	3000	Concrete
Uniformat Lvl 1	4000	Masonry
Uniformat Lvl 2	6000	Wood and Plastics
Uniformat Lvl 3	7000	Thermal and Moisture Protection
Assembly Lvl 1	8000	Doors and Windows
Assembly Lvl 2	9000	Finishes
Job Cost	10000	Specialties

Setup

Cost Indices Markups Metrics Options Smart Categories Units Users WBS Tables

Cost Index

ENR Time Based Index

RS Means City Cost Index

	Date	Total	Label
1	1/1/1990	2664	
2	2/1/1990	2668	
3	3/1/1990	2673	
4	4/1/1990	2676	
5	5/1/1990	2691	
6	6/1/1990	2715	
7	7/1/1990	2716	
8	8/1/1990	2716	
9	9/1/1990	2730	

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