



# How Large MEP Contractors Manage Change:

Hands-on Advice For Resilience & Growth

**KOJO**

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# Mastering Change:

## Overcoming Challenges To Drive Success

Large mechanical, electrical, and plumbing (MEP) trade contractors face unprecedented challenges today. Persistent labor shortages, rising project demands, and the need for operational efficiency are reshaping how your organization approaches its work. To stay competitive, all your teams must adapt—and fast.

To meet these challenges, large MEP contractors have introduced new technology to their workers, which often **requires organizational changes at almost all levels.**

It can't be too difficult, right? Well, consider that according to a [McKinsey study](#), **only 30% of change programs succeed.** The staggering lack of success doesn't come from a faulty tech provider or external factors. In fact, a whopping 70% of those failures can be attributed to employee resistance and management's failure to support those intended changes.

70%

Of change program failure is due to employee resistance

McKinsey



Recognizing that it can be challenging to change workflows, Kojo has staffed a large customer onboarding and support team to assist customers in managing this change. Having helped hundreds of large contractors successfully integrate Kojo into their teams' workflows, our customer onboarding and support team has accumulated a wealth of best practices and pitfalls to look out for. The lessons they share in this e-book can be applied to tech adoption as well as other types of changes – empowering your organization to avoid that 70%.



## Large MEP Contractors Need A Strategic Approach To Change

### The labor shortage challenge

Large MEP contractors face mounting pressure to adapt, driven largely by a persistent labor shortage. The Associated Builders and Contractors (ABC) projects **the need for 454,000 additional workers by 2025**. This creates two critical challenges:

- ➔ **Short-term:** Teams will need to find ways to do more with less resources.
- ➔ **Long-term:** you'll need to adopt strategies that attract and retain skilled workers.



What Kojo has done for us is it allowed us to continue to grow without necessarily having to continue to add manpower and overhead.



Nathan Weise, CFO,  
Kleinknecht Electric

### Technology as a solution

Technology offers a powerful means to address these challenges, which is why \$50 billion has been invested in AEC tech between 2020 and 2022 alone. Construction software like Kojo is leading the way, helping subcontractors streamline procurement and materials management through:

- ➔ **ERP Integration:** Works seamlessly with tools like Deltek ComputerEase.
- ➔ **Streamlined Workflows:** Eliminates time-consuming tasks that distract your team from their core responsibilities.
- ➔ **Cost Savings:** Reduces administrative overhead, delivering immediate ROI.



When it comes to managing the change of rolling out new technology, don't order the happy meal before you finish the hamburger. You have to start with what is doable for your business.



DeeDee Foster, CFO,  
Atlas Mechanical

## The importance of change management

Implementing new technologies or processes requires more than just investment—it demands a thoughtful change management strategy. Without one, even minor adjustments can result in:

- ➔ **Operational Disruptions:** Workflow interruptions that affect productivity.
- ➔ **Increased Costs:** Hidden expenses stemming from inefficient adoption.
- ➔ **Turnover Challenges:** Higher turnover, especially among younger employees, who experience a 38% attrition rate (workers under 25).

## Benefits of a change management plan

A clear change management plan enables contractors to successfully implement new technologies by focusing on:

- ➔ **Addressing Challenges:** Proactively reducing resistance to change.
- ➔ **Team Alignment:** Ensuring all stakeholders are on the same page.
- ➔ **Maximizing ROI:** Delivering full value through proper training and integration.



With an effective strategy, large MEP contractors can empower teams to adapt quickly, improve efficiency, and position themselves as leaders during the industry's transformation. Embracing both technology and change management is key to achieving sustained growth and resilience.



# How Successful MEP Contractors Prepare For Change

Optimize your success by following these steps for change management

01

## Document your current workflows and processes

Before you can make meaningful improvements, you need a clear understanding of how your current systems and processes function. This involves documenting workflows, identifying dependencies, and outlining how teams interact with one another.



### Maddie is here to help you document your flows

Mapping out your procurement process makes it easier to identify inefficiencies and plan for necessary changes. I can guide you through our 7-step process to clearly define the actions required to keep your procurement workflow running smoothly.

Maddie Arthur,  
Manager of Customer Onboarding at Kojo

[➔ View our 7 steps of procurement](#)

02

## Get executive buy-in

For your change management strategy to bear fruit, all company executives must be bought in and aligned. This means you all agree on the changes' costs, timeline, and overall goals. Doing so will instill confidence in your entire staff, whether your team of purchasing agents in the office or the foremen at each job site.

04

## Identify how this change will affect each person

Change impacts individuals differently. Whether it's a new software system, a restructured process, or updated roles, you must evaluate how these changes will affect team members across the organization. Ask yourself:

- ➔ **What tasks or tools will change for each team?**
- ➔ **Will anyone's workload increase temporarily?**
- ➔ **What training will they need to succeed?**

Engaging with your teams early to understand their concerns and perspectives will foster a culture of collaboration and reduce resistance. Also, consider that involving employees in decision-making increases change success by 15%. (Gartner)



### Good advice from Paul, our onboarding specialist

A common pitfall we've seen is a lack of getting all stakeholders informed before we kick off training. Field and procurement teams can be on board, while AP has been in the dark.

Paul Weston,  
Customer Success Manager, Onboarding at Kojo.



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## Create a change management policy

A documented change management policy provides a framework to guide the entire implementation process. This policy should:

- ➔ **Define roles and responsibilities during the transition.**  
Appoint change champions—respected early adopters within each department—identify pilot groups, and assign individuals to track and report success metrics.
- ➔ **Establish clear timelines.**  
Introducing workflow changes mid-project can lead to chaos. Instead, target breaks between jobs or slower seasons to implement new technology and processes. Set clear dates for software integration, training, pilot rollouts, and company-wide deployment.
- ➔ **Outline steps to monitor progress.**  
A change management policy will clearly list the goals your company is striving to achieve and specific metrics to help identify if that goal is being met.

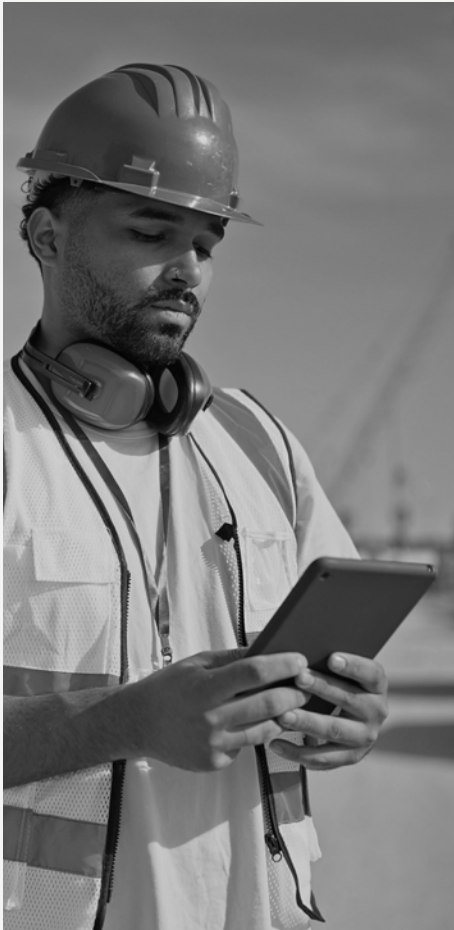
04

## Choose software & workflow tools wisely

Not all workflow tools are created equal. MEP contractors must ensure that the software or workflow tools they adopt align with their specific needs and goals. When evaluating options, consider:

- ➔ **Ease of use:** Will your team be able to learn it quickly?
- ➔ **Integration capabilities:** Does it work seamlessly with your existing systems?
- ➔ **Scalability:** Will it grow with your business?

Conducting demos, gathering feedback from end users, and consulting with your IT team can prevent costly missteps. Also, be sure that the software/workflow tool you choose to work with offers extensive support documentation and dedicated customer success staff to address your specific needs.



## Construction sector faces massive challenges, but is slow to digitize.

### 56%

Of US executives claim that ROI for digital transformation initiatives has exceeded their expectations.

KPMG

### 18%

Of project time is spent searching for data — significantly impacting performance with nearly half of projects going over time and budget.

Procore





## Best Practices For The Change Implementation Phase

Once you've taken all the previous steps, you can begin implementation. But, successful large MEP contractors don't roll out changes all at once. Instead, they take a measured approach through these key steps:

### 01 Leaders train first

As previously mentioned, getting executive buy-in and aligned leadership is paramount for all your teams to take these changes seriously. However, the confidence in the changes can only last if each employee trusts that leadership really knows what they're talking about.



#### Tips from Jesse

I have had great success with organizations that train as a leadership group first and then conduct training with the rest of the team. This allows the decision makers to have a full grasp of the tech they're implementing before making major decisions.

Jesse Thomas,  
Customer Success Manager, Onboarding at Kojo.

## Only 27%

of employees on average agree that their leadership is trained to lead teams through change

Changingpoint.com

## Communicate upcoming changes strategically

Once the leadership team understands how the new technology and/or new process will affect those in the departments they oversee (and can teach those changes effectively), then they can announce the upcoming changes.



### Checklist suggestions from Paul, our onboarding specialist

**Customer Communication:** Send a company-wide email focusing on how the software will positively impact employees' daily lives, rather than just highlighting features.

**Training Schedule:** Include clear dates and times for training sessions.

**Account Setup Support:** Provide images to guide employees in creating their accounts.

**Pilot Group:** Specify which jobs are selected for the pilot rollout.

**FAQ Section:** Include an FAQ section to address common questions.

**Create themes:** for example “operational efficiency” or “procurement accuracy” could be familiar themes every department can rally around.

**Dedicate Internal Support:** Designate a specific person within the organization to handle additional inquiries.

Paul Weston,  
Customer Success Manager, Onboarding at Kojo.

## 6x more likely

Change programs are six times more likely to succeed when structured around clear, understandable themes, according to 2,000 executives.

Mckinsey

03

## Start small with trusted individuals

Even small workflow changes within your organization carry a risk of disruption. When implementing a new technology that affects multiple teams, that risk is exponentially greater.



### Isabella's tried and true approach:

**Start Small:** Pilot the software with a small, carefully selected group (e.g., one field crew or one purchasing agent) rather than rolling it out to everyone at once.

**Phased Rollout:** Gradually expand implementation using a strategically timed approach.

**Gather Feedback:** Collect input from pilot teams to identify and address any issues before the full rollout.

**Make Adjustments:** Refine workflows and resolve problems based on pilot feedback.

**Prepare for Full Rollout:** Ensure staff are equipped to handle any challenges during the full-scale implementation.

Isabella Arruda,  
Enterprise Implementation Project Manager at Kojo

04

## Train teams in-person

Many subcontractors (especially those in the field) are the type that need to see it to believe it. An email or a website link with instructions is not enough to get the change in behavior you and the leadership team are seeking. Often, the most effective way to get your teams to adopt change is through in-person training.



### Case Study: Successful Incremental Software Implementation

Kojo partnered with one of the largest MEPF contractors in Wisconsin, and began their implementation with a small office group. To ensure successful adoption across other departments, on-site lunch-and-learn sessions were held for teams not yet introduced to Kojo. These sessions showcased Kojo's documented value to the company in person, fostering early buy-in and paving the way for smoother onboarding and implementation.

05

## Set an all-or-nothing approach

Change only becomes action when it's backed by a deadline—until then, it's merely a request.

To ensure lasting success, large-scale MEP contractors solidify the use of new technology or processes into their company policies. Additionally, it's essential to clearly define responsibilities, ensuring every department and individual understands their accountability. By setting clear expectations and eliminating ambiguity, you leave no room for excuses.



### Tips for success from Isabella

**“Many times, I’ve witnessed the all-or-nothing approach go well. Leadership tells the pilot team, and later the remaining teams, that after a specified date, the purchasing team will not accept requisitions that don’t come from Kojo.”**

Isabella Arruda,  
Enterprise Implementation Project Manager at Kojo





# 83%

of workers suffering from change fatigue say their employer has not provided enough tools or resources to help them adapt

Capterra

## Post-Change Tactics For Long-term Success

Despite the persistent labor shortage, your goals should still be focused on growth. But, as you bring on new skilled trade workers, accounting staff, IT personnel, or otherwise, you'll need them to adopt the changes you've made to your organization quickly. When it comes to changes that involve a new procurement software like Kojo, this requires well-written documentation to be ready.

### Create an internal library

trying to use technology to teach new software to a staff that is reluctant to adopt new technologies in the first place might not bode well. An effective strategy we've seen from our larger customers is to print and laminate a 2-3 page step-by-step guide for field users and distribute it to all applicable job sites. Be sure to have a translated version available if your field crews consist of any non-English speakers.



**“One of the largest electrical subcontractors we work with created a Wiki page where they host all their shared help articles, video tutorials, and other step-by-step guides. This internal resource makes onboarding new employees easier so they can start making a positive impact sooner.”**

### Leverage external support

In addition to the internal documentation you create, ensure the technology partner (or the change agent you're working with) also has plenty of support documentation. Kojo offers our training program, [Kojo Academy](#). This resource is organized for different teams so those at the job site, office, warehouse, and more know how to use the functions most relevant to them.



**50%**

of leaders don't know whether recent organizational changes have succeeded.

Open source change

## Track performance metrics

The best change documentation doesn't just consist of "how-to guides" for long-term success. You'll also need to track certain metrics regularly to see if the changes you've made are actually creating a net positive impact on your operations. Those metrics must be measured against your goals during the executive buy-in stage. For example, if the goal was to reduce material waste at the job site by X% within 6 months, has that happened?

## Measure worker morale

In addition to these operational metrics, how does your staff feel about the changes after adopting them? We highly recommend sending out surveys to their staff after each team has adopted the changes to find any bottlenecks and gauge company morale as well. The current labor market for skilled trade workers is small, giving them an imbalance of leverage. You'll need to make sure they're happy since your company can't afford to lose any of them, especially not to changes that are intended to help them work more efficiently.



## Sustaining Success: Key Strategies for Implementing Procurement Software

To ensure long-term success after implementing changes like new procurement software, focus on effective onboarding, robust support, and ongoing evaluation. Build internal resources, such as a centralized Wiki or accessible printed guides, to help employees adapt quickly. Partner with technology providers for additional training support. Track performance metrics and gather employee feedback to measure the impact of changes on operations and morale, addressing issues proactively to retain talent and achieve your growth goals.



# Leading The Future Of Large-Scale MEP Contractors

## Strategic change management to drive growth, resilience, and innovation

Change isn't optional for large contractors—it's essential for growth and long-term resilience. However, the success of these changes hinges on thoughtful planning, leadership alignment, and a commitment to supporting your teams throughout the process.

By embracing proven change management practices—such as documenting workflows, securing executive buy-in, piloting implementations, and creating clear policies—you can mitigate disruption and ensure smooth transitions. Choosing the right software also makes a tremendous difference. Kojo not only streamlines procurement, but it also provides large-scale subcontractors with a dedicated customer success manager who is dedicated to helping everyone in your organization through the transition.

Remember, effective change is about more than tools or processes. It's about fostering a culture of collaboration, innovation, and adaptability. Engaging your teams early, addressing their concerns, and continuously evaluating progress will help your organization stay ahead of industry challenges and attract the next generation of talent.

With a robust strategy in place, your organization will be well-positioned to not only navigate today's challenges, but also lead the industry into the future.



## About Kojo

**Kojo is the construction industry's leading materials and inventory management platform.**

Kojo enables trade and self-perform general contractors to streamline every step in the procurement and inventory management process from takeoff to closeout. By connecting field, office, warehouse, accounting, and vendors teams on one software platform, Kojo gives contractors visibility into real-time materials spending and usage, helps them source the best prices and availability across suppliers, reduces material waste, and increases labor productivity.

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