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GUIDE

AI for **Construction Companies**

7 tasks AI can help you do faster, securely, and what needs to be in place first.

PREPARED FOR

Construction owners, project managers, estimators and office teams

PREPARED BY

Reis Informatica

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Your team is probably already using AI

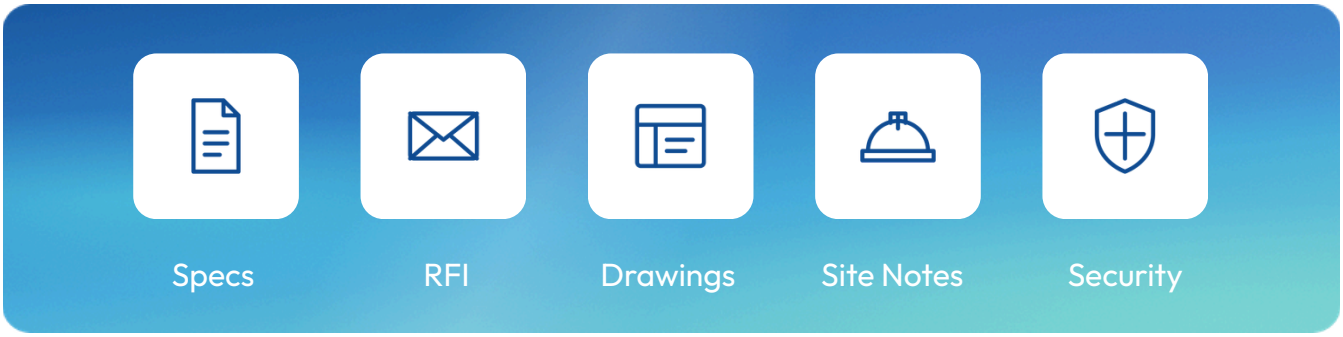
Project managers are tidying up client emails with ChatGPT. Estimators are summarizing tender packages. Office staff are drafting proposals in half the time.

Used well, AI takes hours of paperwork off your team's plate. The risk isn't the technology. It's what gets shared along the way: bids, drawings and client information ending up somewhere you don't control.

Quick self-check: where are you with AI today?

- [ ] We're already using AI in our business
- [ ] We don't know where to start
- [ ] We're using AI, but we're concerned about security, such as personal ChatGPT or Claude accounts used for business data

AI best functions as an assistant, not a replacement. It can draft, summarize, organize and suggest options. Your team still gives context, checks facts, applies judgment and approves the final result. It replaces the blank page, not the person.



Never upload these to any AI tool

- **Passwords, access codes and system details.** Anything that could help someone get into your systems.
- **Banking and payment details.** Account numbers and anything used to move money.
- **Personal information.** Employee and subcontractor records, rates, certifications and health details.

Approved business AI tools only

Never in free or personal accounts.

- **Bids, pricing and estimates.** Your numbers are your competitive edge.
- **Drawings and design files.** They often belong to your clients or architects, so check your agreements first.
- **Contracts and client details.** Many include confidentiality clauses.
- **Meeting notes, procedures and draft proposals.** Internal information that should stay inside your business.

Fine in most tools: website content, published information, general questions.

What counts as a company-approved AI tool?

Usually the business version of a tool you already pay for, such as Copilot in Microsoft 365, ChatGPT Enterprise or Claude for Work. Business plans typically don't train on your data, and your admin controls who has access. Hosting AI in your own cloud or on your own servers gives more control, but takes a bigger investment.

Simple test: would you be comfortable if this left your company? If not, keep it in an approved business tool, or leave it out.

3 jobs AI shouldn't do on its own

1. Set final pricing or bid numbers
2. Make safety-critical decisions or structural calculations
3. Send anything to a client without a person reviewing it

7 tasks AI can help you do faster

Each task could include information that should not be shared. Learning how to keep your data safe is the next step. Always use a company-approved tool, and always have a person review the output.

Getting good results from any task

- Write a clear prompt: give the purpose, key details, tone and the next step you want.
- Check before anything goes out: names, dates, prices, promises, and whether it sounds like you.
- AI predicts what a good answer should sound like. When it's missing information, it can fill the gap confidently, which is why a person always reviews the output.

1 Summarize specs, contracts and tender documents

Turn a 60-page specification or tender package into the key requirements, deadlines and scope items your team needs to know.

Try asking: "List the submission requirements, deadlines and mandatory qualifications in this tender document."

2 Draft RFIs, submissions and client emails

Get a clear first draft of routine correspondence in seconds, then add your project knowledge.

Try asking: "Draft an RFI asking the architect to clarify the door hardware spec in section 08 71 00."

3 Turn meeting and site notes into action items

Convert rough notes or voice memos from a site walk or coordination meeting into a tidy list of who's doing what, by when.

How it works: messy input (site notes, email threads), then AI organizes it (summary, priorities, action list), then you decide (what matters, who owns it, what happens next).

Try asking: "Turn these site meeting notes into a list of action items with owners and due dates."

4 Prepare first drafts of proposals and scope descriptions

Start from a structured draft instead of a blank page, then tailor it to the project.

Try asking: "Write a scope of work outline for a commercial interior fit-out, including exclusions and assumptions."

5 Find information faster across project files

Connect to your project files, folders and email. Then ask a question in plain language and find the right document, email or drawing reference without digging through folders.

Try asking: "Find the latest approved change order for the Main Street project."

6 Build checklists and outlines

Create starting points for closeout checklists, onboarding checklists or toolbox talk outlines.

Try asking: "Create a project closeout checklist for a mid-size commercial build."

7 Write daily reports and progress updates

Turn crew notes into a consistent daily report or a client-friendly progress update.

Try asking: "Turn these notes into a short weekly progress update for the client."

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Is your business ready for AI?

AI only saves time if the foundation underneath it is solid. Check what's already in place. Anything left blank is where to start.

People

- [ ] We know which AI tools our team is already using
- [ ] Staff have had basic training on safe AI use
- [ ] Office and field teams both understand the rules

Policies

- [ ] We have a simple guideline for using AI at work
- [ ] Our "do not upload" list is written down and shared
- [ ] Approved AI tools are named, so nobody has to guess

Identity and access

- [ ] Multi-factor authentication is on for every account, including AI tools
- [ ] Site staff have their own logins, not shared ones
- [ ] Staff use business AI accounts, not personal ones
- [ ] Access is removed when people leave or projects end

Data

- [ ] We know where our project files live
- [ ] Each type of data has a clear owner
- [ ] Sensitive folders (bids, HR, finance) have restricted access

Backup and security

- [ ] Backups run automatically, and we've tested restoring them
- [ ] Every device, including field tablets, is protected and up to date
- [ ] Our systems are monitored for suspicious activity

> Companies usually know where their data lives. What they struggle with is the why, what, who and how of that data. Data governance and ownership always comes first.

Juan Paolo Maranan, Client Success Manager, Reis Informatica

Your AI policy can be one page

Which tools are approved, your green, amber and red lists, and who to ask.

Tidy permissions first

Business AI tools generally see whatever the signed-in person can already see. If file sharing is messy, AI makes that mess easier to find.

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Your next step

1

Choose one repetitive, low-risk task this week, in the green or amber zone.

2

Spend 20 minutes trying AI on a first draft, in a business account.

3

Review the result carefully.

4

Decide honestly: did it help?

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Frequently asked questions

Do we already have AI included in Microsoft 365?

Many business plans include a Copilot Chat option, and the fuller Microsoft 365 Copilot is a paid add-on. It depends on your licence, so check before buying something new.

We're small. Do we really need an AI policy?

Yes, but it can be one page: which tools are approved, your green, amber and red lists, and who to ask.

Which AI tool should we use?

Start with what fits the tools you already use, and always the business version. The tool matters less than the habits.

Will AI replace my staff?

It replaces tasks, not people. The businesses getting the most out of it are giving their team time back for work that needs judgment.

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