Join

Pursuit Toolkit

Demo project setup guide

Build a pursuit-ready project in Join that shows the owner you're already invested in their success — before the work is even awarded.

What's inside

- A step-by-step checklist for standing up your pursuit project
- What to load, how to brand it to represent your team's effort
- How to present it in an RFP response or interview — safely and on-message
- Why each step matters, in the words of the owners you're pitching

Build with confidence.

Part of the Join Pursuit Toolkit · toolkit.join.build

Why build a pursuit project

Show them their project, not a slide about software

Strong relationships win trust, but they don't win the next bid on their own. When the conversation turns to preconstruction, the differentiator isn't which estimating tool you use — it's whether the owner can see exactly how you'll manage cost, schedule, and design from day one.

Standing up the pursuit project in Join puts their building on the screen with real-time cost insight and a shared dashboard behind it. More than a demo, it signals a forward-looking team — one already hunting for ways to add value before a contract exists.

> **Why it matters**
> Owners can tell a partner from a vendor early. A vendor sits on the sidelines reporting what's already been decided; a partner reads the map ahead and offers alternate routes around the traffic. A pursuit project is your chance to look like the partner before the job starts.

> "If they are just sitting along the sidelines and acting as a reporter telling you what you've done, that's not what I'm looking for. I'm looking for a true collaborative partner who can see the map in front of us."
> — Owner, healthcare capital programs

Step 1 · Stand it up

Build your pursuit project

Work top to bottom. None of this requires the owner's real data — a tailored demo environment is enough to tell the story. Each step adds a layer of credibility to the room.

1. **Create a new project for the pursuit** in Join.
2. **Invite your team.** Add business development plus any precon or project leads involved in the pursuit or the presentation.
3. **Import a preliminary estimate and target budget.** Even rough numbers make the dashboards real.
4. **Set your categorizations and work breakdown structure** so dashboards are tailored to this project — TVD clusters (Envelope, Interiors, Site, Structure, Systems) for TVD pursuits, UniFormat for CMAR and Design-Build.
5. **Add a few items** you've already spotted in your evaluation — early cost and schedule opportunities the owner hasn't seen yet.
6. **Add risks to the risk register,** each with a response plan, to show you've named the exposures and have a plan behind every one.
7. **Create scenarios** — a low, medium, and high-cost path forward — to frame trade-offs as value management, not a cut list.
8. **Upload a project rendering** on the Settings page. Their building on screen builds connection and story.
9. **Upload a custom print header** with logos for your company, the owner, and the design team to brand every dashboard and report.
10. **Customize Join terminology** on Settings to match the project's language (for example, "Target Budget" for Budget, "Baseline Estimate" for Estimate).
11. **Add GSF (or another unit) to the milestone** so you can show cost per GSF on the project cost summary.

> **Tip · Keep it correctly categorized**
>
> Set the project status to "In Pursuit" so it doesn't count against your Annual Subscription Value for the first 90 days. Once awarded, update to "Active" or "Lost."

Step 2 · Present it

Use it in proposals and interviews

In an interview, you have three to five minutes on precon inside a longer team pitch. A tight, confident story beats a feature tour every time — pick the views that match the owner's priorities and walk them in order.

Lead with these views

- **Cost trendline** — the single image that says "we're on top of your money." The line moves when a decision is made, not from guessing.
- **Estimate chart** — grouped by TVD cluster or UniFormat, each tracked against its own target.
- **Items chart** — every open question with a cost impact, a date, and a name on it.
- **Milestone summary report** — aggregates estimate and item data into any work breakdown structure you choose.

> **Caution · Check the Owner role first**
>
> Before you screenshot or present live, switch to the Owner role to confirm your permissions and settings match what the owner will actually see. As Administrator, go to the Team page, click See Roles, then Preview Role for the Owner role.
>
> **Plan a backup, too.** Not all wifi is created equal — keep static snapshots or a short screen recording saved locally so a bad connection never derails the room.

Make it about their project

Every owner values something different. Tailor what you show to their clusters, their packages, their milestones — and to the conditions of satisfaction and untouchable design elements they've already named. Showing you protected what matters most to them lands harder than any feature.

> **Force the priority**
>
> "Let's start having conversations about what's important. Is it schedule? Is it budget? It's not both — there's always a little bit of a tipping point." On one part, schedule may matter more than anything; on another, you'd rather save money here to spend it over there. If the owner isn't telling you their goals, ask — and don't let them go until they do. Knowing which lever leads tells you whether to open on the trendline or the timeline, and which trade-offs to frame in scenarios.

> "I want the truth. I don't want a cool story, I don't want a fairy tale. Seeing it on a continual basis — that's as close to reality as we can get."
>
> — Owner, on real-time cost over milestone estimates

Quick reference

What each view says about your team

Use this to decide what earns a place in your three to five minutes.

Show this	What the owner hears
Cost trendline	“You’ll always know the real number — not last month’s. We’re on top of your money.”
Estimate by TVD cluster	“Each part of the project is designed to its own target, and we can see how every piece moves the whole.”
Items list	“Every decision has a number, a date, and a name on it before you’re asked to decide.”
Risk register	“Contingency you can see being managed — a plan, not a cushion we’re quietly sitting on.”
Scenarios	“When there’s a real trade-off, you’ll see each path priced side by side and decide with the full picture.”
Shared dashboard	“The view in this room is the same live view I’ll have every day of the project.”

Join

Want a hand putting this to work?

Your Join team can spin up a pursuit-ready demo tailored to your sector — healthcare, education, civic, and more — usually within a day. We’ll help you pick your focus areas, set your groupings, and talk through your flow.

Book a pursuit session → pursuit.join.build