



Client Industry

Commercial Construction

*Healthcare, Infrastructure,
and Large-Scale Development*

The Challenge

A national construction firm approached IDLance with a challenge: despite access to robust financial systems and processes, many project managers and superintendents were still not speaking the same financial language. This disconnect was leading to:

- Inconsistent forecasting and margin planning
- Gaps in accountability across office and field roles
- Delayed or unclear Change Order submissions
- Low confidence in cost-related conversations with owners and trade partners

The client needed a training solution that would empower both PMs and superintendents with shared financial fluency, without adding extra strain to busy project teams.



CASE STUDY

Boosting Financial Fluency
Across Construction Teams

The Solution

IDLance developed a blended learning experience that balanced conceptual understanding with hands-on practice. This included a tiered learning approach combining eLearning and Instructor-Led Training.

Tier 1: eLearning | Awareness & Foundation

IDLance created three custom eLearning courses in Articulate Rise:

- **Project Financial Basics for Builders:** Introducing the five pillars of project financial management and how they appear across a project's lifecycle
- **Forecasting & Margin Essentials:** Explaining margin plans, forecasting rhythms, and proactive risk tracking
- **Cost Control & Billing Fluency:** Clarifying contract types, billing cycles, and how field data supports cost accuracy

Each module emphasized clarity, real-world examples, and glossary terms to help users confidently grasp complex topics.

Tier 2: Instructor-Led Training | Practice & Application

To reinforce the eLearning, IDLance developed and facilitated a 2-hour in-person workshop series:

- **Game-based knowledge checks** (e.g., Family Feud) to reinforce retention
- **Group brainstorming and scenario role-plays** on billing, forecasting, and Change Order communication
- **A Communication Planning Worksheet** to help teams clearly and confidently talk about cost with owners and trade partners
- **Rotating solution roundtables** to crowdsource fixes to common pain points

The ILT sessions were interactive and practical, designed to help learners immediately apply their new skills to active projects.

Scope Evolution

Originally scoped as financial systems training, the project evolved into a broader effort to build confidence and alignment across disciplines. Insights from project teams and finance SMEs highlighted a critical theme: money conversations needed to become part of routine operations, not reactive escalations.

IDLance expanded the program to include:

- Communication strategy practice
- Templates for weekly financial syncs
- Messaging guidance to reduce defensiveness and improve clarity

Tools & Instructional Design Approaches

- Articulate Rise for self-paced digital learning
- Interactive ILT sessions with custom PowerPoint decks and facilitator guides
- Reusable job aids, communication templates, and planning tools
- Fictional yet familiar case studies grounded in realistic construction scenarios
- Constructive peer feedback and debriefs to normalize financial collaboration

Impact and Results

- Increased alignment between office and field financial practices
- Higher confidence in forecasting and margin storytelling
- More proactive communication with owners and trade partners
- Training program adopted as part of their standard PM and superintendent onboarding

IDLance is proud to have designed a training experience that bridged the gap between awareness and action. By pairing approachable eLearning with high-engagement ILT, we helped project teams build financial confidence, improve communication, and ultimately protect project profitability.

How Can We Help You?

Not every training needs to be a 6-month rollout or a 92-slide snoozefest. We work with construction and field-based teams to create learning that's practical, relevant, and actually gets used.

Here are some of the ways we can support your teams:

- ✓ Custom eLearning
- ✓ ILT & VILT
- ✓ Field-First Communication Tools
- ✓ Microlearning Campaigns
- ✓ Training Strategy & Scoping
- ✓ Course Migrations and Conversions
- ✓ And more!

Let us know what's keeping your teams up at night. We're here to help! Just don't ask us to lift any hammers or use a level. We absolutely can't do either of those things.



Book a Consultation Call

