

2027 Production Builder Budget Planning Checklist



Accounting +
Operations



Construction
Management



Marketing +
Sales

Planning for 2027 Starts Now

A practical checklist to help evaluate your current construction systems and processes, identify operational priorities and prepare for 2027 budget conversations. Budget season is an opportunity to look at the systems and processes your teams rely on every day and determine where change could have the greatest impact.

Is Your Software Ready for 2027?

Check each statement that is true for your business today:

- ☐ Our construction teams can access current schedules, documents and job information from the field.
- ☐ Our inspections can be completed, documented and tracked without separate manual processes.
- ☐ Our lien releases can be collected and tracked without time-consuming follow-up.
- ☐ Our warranty requests can be tracked from homeowner submission through completion.
- ☐ Our field safety processes can be documented, tracked and managed without relying on separate manual systems.
- ☐ Our Purchasing, Construction and Accounting teams work from connected information instead of re-entering data between systems.
- ☐ Our payment and reconciliation processes are connected to our accounting workflows and do not require excessive manual effort.
- ☐ Our ERP and construction management systems can support our expected home building volume and growth in 2027.
- ☐ Our software strategy considers how AI built into the products our teams use can help them access information faster, reduce manual work and operate more efficiently.
- ☐ Our leadership can see financial and operational activity across communities without relying on multiple reports or spreadsheets.

How Did You Score?

✓ 7-10 CHECKED

You're in a strong position for 2027. Look for specific workflows where greater connectivity or automation could make your teams even more efficient.

✓ 4-6 CHECKED

There may be a few areas worth a closer look. Consider which gaps are creating the most work for your teams and prioritize those in your 2027 plan.

✓ 0-3 CHECKED

It may be time for a broader review. Look at where disconnected systems, manual processes or limited visibility are having the greatest impact on your operations.

What Should You Prioritize in 2027?

You don't have to change everything at once. Use this quick assessment to identify which areas deserve a closer look.

AREA TO EVALUATE	WHAT TO CONSIDER	WORKING WELL	NEEDS ATTENTION	2027 PRIORITY
ERP + Financial Operations	Financial visibility, purchasing, reporting, accounting workflows	☐	☐	High / Med / Low
Construction Management	Scheduling, field visibility, Supplier + Trade communication	☐	☐	High / Med / Low
Inspections	Field completion, documentation, issue tracking	☐	☐	High / Med / Low
Lien Management	Collection, tracking, compliance, follow-up	☐	☐	High / Med / Low
Warranty	Homeowner requests, assignments, tracking, resolution	☐	☐	High / Med / Low
Safety	Field safety processes, documentation, compliance and visibility	☐	☐	High / Med / Low
Payments + AP	Payment processing, reconciliation, remittance	☐	☐	High / Med / Low

My Top Three 2027 Priorities

01

02

03

Build The Business Case

Check the challenges that are most relevant:

- | | |
|---|---|
| ☐ Too much manual data entry between systems | ☐ Manual lien release tracking and follow-up |
| ☐ Limited visibility across communities or jobs | ☐ Limited visibility into warranty requests and resolution |
| ☐ Too many spreadsheets or offline processes | ☐ Too much manual payment processing or reconciliation |
| ☐ Difficulty communicating changes to Suppliers and Trades | ☐ Current ERP or construction systems are difficult to scale |
| ☐ Time-consuming inspection processes | ☐ Other: |

What Is Driving These Priorities?

Once you've identified your priorities, the next step is being able to explain why they matter to the business.

For Each Priority, Be Ready to Answer:

What problem are we trying to solve?

Who is affected by it today?

What is the impact of the current process?

- | | |
|-------------------------------------|--------------------------------------|
| ☐ Time | ☐ Efficiency |
| ☐ Cost | ☐ Scalability |
| ☐ Visibility | ☐ Other: |
| ☐ Control | |

What would improve if we addressed it?

Could embedded AI help improve this process or reduce the amount of manual work required?

Why should this be a priority in the 2027 budget?

Before the Budget Meeting

- ☐ Can we clearly explain the problem?

- ☐ Do we understand which teams and processes are affected?

- ☐ Can we describe the business impact of the current process?

- ☐ Do we know what improvement would look like?

- ☐ Can we explain why this should be a 2027 priority?

See Where Hyphen Fits Into Your 2027 Plan

Your 2027 priorities should reflect where better connectivity, visibility and automation can have the greatest impact on your business.

Whether that means modernizing your ERP, improving construction management, streamlining inspections, automating lien processes, strengthening warranty management or simplifying payments, Hyphen Solutions connects the software and workflows Production Builders rely on across construction and back-office operations.

With AI built into Hyphen products, Builders can access information faster, reduce manual effort and work more efficiently. Explore how **BuildPro**, **BRIX**, **Hyphen Wallet** and **connected Hyphen solutions** can support the priorities you've identified for 2027.

Your 2027 Planning Bonus

Connect with Hyphen about your 2027 priorities and receive your choice of 3 complimentary implementation planning sessions or 5 complimentary education and training accounts to help your team take the next step.

Claim Your 2027 Planning Bonus

