



Dr. Jim  
HOFF

## Building a Sustainable Roofing Business with Software



:: Many roofing contractors are taking advantage of today's business software tools.

**S**ometimes it doesn't seem possible, but I've been involved with the roofing industry for over forty years now, with my first ten years as a contractor, over twenty years with a major materials manufacturer, and the last ten years as an independent consultant. Looking back over those forty years, I think the biggest change I've witnessed is

the tremendous business opportunity that today's computer software can offer for the long-term success of roofing contractors.

During the years I spent on the manufacturing side of the industry, I was deeply involved in the use of software to increase efficiency, reduce costs, and create a positive and uniform experience for customers. In particular, I remember working on a very large project nearly twenty years ago to automate all of the company's transactions, including sales, production, accounting, and customer management into

a single mainframe computer platform. The cost ran into the hundreds of millions of dollars and the results weren't always what we expected. In many cases the software made us change time-proven procedures rather than make the software change to meet the unique needs of our business. And sometimes revising even one line of a computer-generated report required several months and thousands of dollars. Thankfully, this type of experience is now mostly in the past; and the effort required to combine all of a company's important business transactions under a



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single software umbrella has become much more reliable — and a lot less expensive.

In fact, the emergence of simple web-based business solutions covering almost every key business activity has become so economical that small businesses can now obtain the same level of computer know-how once reserved for only the largest companies. Using the many popular software programs now available, roofing contractors across the country can empower employees to provide a consistent customer experience and continually increase sales and quality to make their businesses as profitable as possible.

Responding to the benefits available with today's business software, many roofing contractors are taking advantage of some of the tools available, especially in the area of estimating and project management. But, in my opinion, too few contractors are taking a comprehensive approach to computerizing every aspect of their businesses and combining all of these important business functions into a single software umbrella.

That's why I hope you will take a closer look at all of the articles in this month's issue of *Roofing Contractor*, which focusses on the many ways software can make your business more successful and sustainable. To help you get started, here are a few key areas where software can make the difference in achieving an outstanding roofing business.

- **Take-Off and Estimating.** With the latest estimating software, take-off options include satellite, aerial, and onsite measurement, as well as electronic and paper plans. These estimating programs not only generate precise bills of material and labor estimates, but they can be customized for the exact brands of products you buy and the way your individual crews work. A solid estimating program provides the foundation for your business by assuring that what you "see" on a roof lines up with what you really need to know. And a solid foundation in estimating then runs through your entire business, from purchasing the right materials, scheduling the right crews, avoiding costly mistakes, and billing your customers on time.
- **Quoting and Proposal Writing.** Proposal writing software allows you to build on the foundation of consistent takeoff and estimating by generating professional business proposals that anticipate your customers' questions and sell the value of your company.
- **Project Management.** Once you get the job, project management software automatically generates purchase orders for materials and subcontracts and inserts the project into your company's work schedule. Project management software also can be used to document daily and weekly job progress, including change orders and potential problems. Good project management software can track the project's costs and schedule against the original budget, providing critical feedback for your estimators and superintendents. Finally, project management software allows you to quickly generate invoices and necessary project close-out documents.



• **Service Management.**

This software allows you to manage your service operation with software programs specialized to the unique aspects of service calls, starting from responding to service requests, scheduling service personnel, generating condition reports, generating invoices and customer follow-up.

- **Asset Management.** Asset management software allows you to extend your project and service business to include comprehensive roof asset management for your larger clients, including annual roof asset condition reports, budget forecasting and warranty tracking.

- **Customer Management.** Customer Relationship Management (CRM) programs allow you to identify and track all of your customers, both long-term and prospective, so that you never miss an opportunity to meet their needs. CRM programs are especially useful in generating ongoing customer outreach with newsletters and other sales tools.

- **Mobile Apps.** You can use mobile apps to make the customer response of every member of your team professional and consistent with the goals and standards of your company. By equipping every salesperson, service technician, and project superintendent with a mobile version of your business software, you can assure that the data on your customers is reliable and up-to-date. And you can make sure your team members always follow key procedures and practices that lead to increased customer satisfaction and higher sales.

Each of these types of software can certainly make your business better. But when you combine all of them together, you get an even greater effect. When you use the accuracy, consistency, and flexibility of modern software to manage your business, the larger benefit will be measured in increased customer loyalty, more enthusiastic employees, and supportive suppliers who want to help you continue growing your business. **RC**

*Jim Hoff is president of TEGNOS Research, Inc. and lead instructor for Commercial Roofing Boot Camp sponsored by Roofing Contractor and Building Enclosure. Learn more by visiting [www.tegnos.org](http://www.tegnos.org).*