

Roofing Technology Think Tank



# TECHNOLOGY LANDSCAPE

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A COMPREHENSIVE GUIDE TO  
HELP CONTRACTORS  
UNDERSTAND CUTTING-EDGE  
SOFTWARE TOOLS SPECIFICALLY  
TAILORED FOR THEIR NEEDS.



# **TECHNOLOGY LANDSCAPE**

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Roofing Technology Think Tank has compiled a comprehensive guide to help contractors understand cutting-edge software tools specifically tailored for their needs.

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# ACCOUNTING

**Selecting your business's accounting software platform will impact your budget, productivity, and ability to analyze data for strategic decision-making. Buying accounting software starts with asking the right questions to help you decide which system will accommodate your organization's needs. It is also important to understand the role you want your accounting system to play, whether that be accounting only or a full ERP (Enterprise Resource Planning) system.**

## How do people use it? What problems does it solve?

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Accounting software can be used for simply tracking financial transactions or used for a complete system of tracking every area of your business (ERP). Accounting systems can vary greatly in pricing. There are typically variations even with specific systems when looking at add-ons and upgrades to the standard package. A robust accounting software or ERP can help you budget, track, and forecast your business.

## What To Ask

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- Is the software cloud-based or on-premises?
- Does it have good, better, best pricing or subscriptions? Is the pricing per user?
- Will my staff and accountant be able to use the software to get the best output for my company?
- Ask questions regarding pricing to understand all fees associated. (ie. annual licensing, implementation costs, upgrade fees, and add-ons)

## What To Consider As You Scale Up

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- Where do you see your company in 5 years and will this software support our company in 5 years?
- What are the standard reports and capabilities of the software out of the box without customization?
- How does the software integrate with other platforms you may use or plan to use in the future?

## Cost

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# TECHNOLOGY LANDSCAPE

## [ CRM ]

**A CRM is a customer relationship management tool. It's often considered a core component of a business. It is used to help track your leads from prospect through project completion. It also provides benefits like communication between customers, project managers, and crews. There are often additional features that help with estimating, contracting, material ordering, reporting, invoicing, and payments.**

### How do people use it? What problems does it solve?

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Companies often look for a CRM or Project Management solution when they've outgrown trying to manage these things in Excel, Word, paper folders, or other simple means.

As companies grow, they'll often find increased value in the feature sets of CRMs. With further growth could come the need for a new more robust solution that is able to meet the needs of your growing business. This is not uncommon.

### What To Ask

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- Is roofing a primary trade you serve?
- What do people love about it? What do they wish it did better?
- How well does it integrate with the tools I already or plan to use (if any)?
- What does the implementation phase look like? How long?
- Are there additional fees not covered in the subscription price? If so, what are they for?
- How does it solve my pain today, and will it allow me to grow with it?
- How customizable is it to my unique business needs?

### What To Consider As You Scale Up

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- How robust is the reporting functionality?
- Is there an open API or webhooks available?
- How much access do I have to my data?
- Do I have a dedicated Account Manager or Support?
- Does it have Two Factor Authentication, Single Sign On?
- How secure is my data?

### Cost

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# TECHNOLOGY LANDSCAPE

## [ ERP ]

**Enterprise resource planning (ERP) is a comprehensive software solution designed to manage and streamline all aspects of your business. It facilitates automated processes across numerous departments, including finance, human resources, manufacturing, supply chain, services, and procurement.**

### How do people use it? What problems does it solve?

Facilitate a seamless flow of information across your organization to boost departmental collaboration. Enhance your throughput while acquiring valuable business intelligence to support informed decision-making. Timely job deliveries become more frequent as you significantly reduce inventory costs and eliminate purchasing mistakes. Enhancements in production efficiency not only minimize operational costs but also seamlessly integrate manufacturing with accounting for accurate job costing. As efficiencies increase throughout your organization, accounting becomes more straightforward and error-free, leading to smarter cash flow management. Furthermore, these improvements contribute to a more efficient and effective sales team.

### What To Ask

- How will the software meet the needs of my organization?
- Which processes will it streamline or automate?
- How experienced is the ERP consultant with working with businesses like yours (in size, industry, and the types of products or services you offer)?
- Does the ERP vendor offer the necessary features to support your growth plans?
- Does the ERP system support training and education modules?

### What To Consider As You Scale Up

- Can I afford a new ERP system?
- What kind of ROI will I get from an ERP System?
- Do I Have The Right People On The Team For ERP?
- Do I need to hire a third-party implementation partner to help with ERP project management?
- Where do I see my business in the next few years?
- What capabilities will I need from my ERP system to support these growth plans?

### Cost

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# [ ESTIMATING ]

This type of software is designed specifically for estimating construction costs and is known as construction cost estimating software. This tool is used by contractors who want to determine the potential costs of a particular project. This software replaces conventional methods like spreadsheets or handwritten records. One of the primary advantages of construction estimating software lies in its ability to save time and reduce the likelihood of errors, making it an increasingly popular tool in the industry.

## How do people use it? What problems does it solve?

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Different features designed in estimating software allow estimators to perform a variety of customizable estimating functions, including:

- Job Cost Estimation
- Report Generating
- Phase Analyzing
- Tracking Schedules
- And More

## What To Ask

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- Is it a generic pricing program, or is designed for estimators?
- Can you use the product along with project management software?
- Is the software cloud-based?
- What is the licensing model of the software?
- Is the software accessible on different devices?
- What training and follow-up support is offered?

## What To Consider As You Scale Up

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- Do you really need to stop using spreadsheets?
- How powerful of a program do we need?
- How difficult is the learning curve to upgrade to the software?

## Cost

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# TECHNOLOGY LANDSCAPE

# [ FLEET MANAGEMENT ]

Fleet management software is a comprehensive application that empowers fleet managers to oversee their vehicles, equipment, and drivers constantly. This software boasts several capabilities that cater to different aspects of fleet management. For instance, it allows tracking individual vehicles, enabling managers to know their whereabouts at any given time. It also monitors driver behavior and gauges performance, which can be crucial for ensuring safety and efficiency. The software further aids in managing and reducing fuel costs, helping companies achieve better cost efficiency.

## How do people use it? What problems does it solve?

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It streamlines vehicle and equipment maintenance scheduling, reducing downtime and promoting optimal performance. This software can also oversee jobs from the moment they're assigned until they're completed, ensuring a smooth workflow. Lastly, it simplifies compliance matters, making it easier for managers to adhere to industry regulations and standards.

## What To Ask

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- Can the system support the size of my fleet?
- How can I use the data it will provide?
- Does the fleet management system integrate with other solutions?
- Can I access the information from anywhere?
- Can the fleet management system grow along with the company?
- Can I see case studies from other companies?

## What To Consider As You Scale Up

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- Do I need fleet management with GPS fleet tracking?
- Do I also need fleet fuel and speed management?
- Do I also need Fleet management with video?

## Cost

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\$ - \$\$

# [ HR/TIME TRACKING ]

The main function of HR/time tracking software for roofing contractors is to streamline and automate various human resources and time management processes within the company. For roofing contractors, it helps improve operational efficiency, reduce administrative overhead, enhance compliance, and streamline human resources and time management processes in the roofing industry.

## How do people use it? What problems does it solve?

**Employee Management:** HR/time tracking software allows roofing contractors to efficiently manage their workforce. It helps store and organize employee information such as contact details, work history, certifications, and skills. This enables easy access to employee records and simplifies tasks like onboarding, offboarding, and performance management.

**Time Tracking:** The software allows contractors to track and manage employee work hours accurately. It provides features such as time clocks, timesheet management, and the ability to record attendance. This ensures accurate payroll processing, eliminates manual errors, and helps maintain compliance with labor laws.

**Payroll Processing:** HR/time tracking software integrates with payroll systems, making it easier for roofing contractors to process payroll. The software automates calculations based on employee hours, overtime, and applicable rates, simplifying the payroll process and reducing administrative effort.

**Project and Job Tracking:** Contractors can use the software to assign employees to specific projects or jobs and track their progress. It helps in monitoring project timelines, allocating resources effectively, and ensuring efficient utilization of labor.

**Compliance and Documentation:** The software facilitates compliance with labor laws and regulations by maintaining accurate records of employee hours, breaks, and overtime. It can generate reports and documentation required for legal and regulatory purposes, such as wage and hour audits.

**Communication and Collaboration:** Some HR/time tracking software includes communication and collaboration features that enable seamless communication between contractors, managers, and employees. This can include features like messaging, task management, and shared calendars to improve teamwork and coordination.

**Analytics and Reporting:** The software often provides reporting and analytics capabilities, allowing roofing contractors to gain insights into their workforce and project-related data. This helps in identifying trends, optimizing resource allocation, and making data-driven decisions for better business outcomes.





## TECHNOLOGY LANDSCAPE

# [ HR/TIME TRACKING CONT. ]

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### What To Ask

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- How easy is it to use?
- Is it customizable for my specific business?
- Does the software have mobile accessibility for remote and field employees?
- What are the pricing options and ongoing costs associated with the software?

### What To Consider As You Scale Up

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- How well does it support multi-state/locations?
- How easy is it to make changes?
- How much access do I have to support?
- What are my constraints with APIs, Webhooks, and Integrations?

### Cost

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# LEAD GENERATION

Lead generation software refers to tools or platforms that are designed to help businesses generate and capture potential customer leads. An example could be using Google Local Service Area ads and Pay per click campaigns, or even using social media. Once you attract a lead, it needs to be stored somewhere that allows you to engage and interact. That may be as simple as having a contact form on your website that connects to an email marketing platform that allows you to easily engage with the lead. It can be set up to deliver specific email communications based on actions or behaviors they take or at predetermined times to maintain contact.

## How do people use it? What problems does it solve?

It will keep your business top of mind for customers while they are in the process of researching buying a new roof, or thinking about hiring your company for repairs. Because it can be automated, based on behavior triggers or time periods, it allows you to provide relevant content and information that guides a customer along the sales journey while your time can be focused elsewhere. Each communication will have a call to action to schedule an appointment. It allows you to educate the lead until they are ready to take action and become a qualified lead ready for a sales appointment. It allows you to avoid wasting salespeople's time on a lead that is not ready to buy.

## What To Ask

- How easy is it to learn and set up automations?
- What does customer support look like? Is there a human I can speak to?
- What is the pricing structure?
- Is there a mobile app?
- Does it support multiple users?
- Do I own the data/user info?
- What kind of analytics does it provide?

## What To Consider As You Scale Up

- Does it integrate into other systems, like my CRM?

## Cost

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# [ MEASUREMENT / AERIAL IMAGERY ]

**3rd party measurement providers offer a safer way to gather measurements of a property. These solutions save contractors time and money by eliminating the need to send someone on a roof to measure it, ensuring accuracy and detail, and often provide streamlined integrations more quickly and accurately generate an estimate.**

## How do people use it? What problems does it solve?

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Measurements are gathered in a variety of ways from satellite imagery, aerial imagery, drone imagery, and ground-level images.

Depending on the solution, you may order the measurements, take photos of a home, or fly a drone. The major pain point this solves is the time lost measuring a roof by hand, and the level of accuracy in putting together an estimate, bid, or material order.

## What To Ask

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- How accurate are your measurements?
- How long does it typically take to turn around one of these reports?
- Do you have integrations with other solutions I use? How do those integrations work?
- How effective is it in the areas I serve?

## What To Consider As You Scale Up

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- What other ways of ingesting data do you offer? XML, JSON, etc.
- Can I receive priority turnaround times?
- What discounts do you offer for increased volume?

## Cost

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# TECHNOLOGY LANDSCAPE

# OPERATIONS

**Operations software is designed to help a company produce or deliver the product or service that they offer. These platforms offer tools that help an organization after the sale is completed. Depending on the product or service offered this platform usually offers tools to help with scheduling, document management, logistics, labor, and equipment tracking. An important aspect of these tools is the ability to help aid in forecasting timelines, controlling costs, and helping an organization stay on budget.**

## How do people use it? What problems does it solve?

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This tool can be used in many ways and by many different people in an organization. Some members of a team may use it to help manage the overall workload of an entire company all the way down to a data entry point like in the field with a foreman or at a machine level to track output. This tool solves many problems for any organization that has many moving pieces. The biggest value from an organizational standpoint of these tools is to remove the veil of what is actually happening. With the correct tool many problems can be solved from customer service issues, profit margins not being met, late or improper billing, and anything in between..

## What To Ask

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- Is the tool built for my industry as each industry has unique problems?
- Can this tool be integrated with my other platforms?
- What types of devices can this be used on?
- What kind of reporting does the platform offer?
- What options for support are available? Can we self-support if we have our staff?
- What is the fee structure?

## What To Consider As You Scale Up

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- At what stage of the life cycle is this platform?  
End of life of expanding?
- How accessible is the data?
- Are there additional options that can be added on in the future?

## Cost

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## TECHNOLOGY LANDSCAPE

# PROJECT MANAGEMENT

Construction project management software provides a valuable tool for supervisors to organize and monitor punch lists, task assignments, and client invoicing. This resourceful software assists contractors and construction companies in adhering to their financial plans and schedules. It does so by facilitating task allocation to employees, deadline tracking, and comparing projected spending against the actual expenditure. Beyond these, the software also provides crucial support in managing documentation and oversight for Requests for Information (RFIs), change orders, and purchase orders. This enhances the operational transparency and efficiency of construction firms and contractors, contributing to the successful completion of their projects.

### How do people use it? What problems does it solve?

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Companies use this type of software to plan and manage the following stages of a project:

- Work breakdown structure
- Risk management plan
- Project schedule
- Scope management plan
- Cost management plan and project budget

### What To Ask

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- Is the software easy to use?
- Do dashboards, grids, charts, and other features make analyzing data easier?
- How will it significantly reduce work and save time?
- Does it integrate well with accounting?
- Are forms and other requests easily generated?
- Does the software enhance collaboration?
- Can it effectively manage construction documents?

### What To Consider As You Scale Up

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- Will it be supported and scalable in the future?
- Software price vs value
- What is the most important problem you need the software to resolve?
- What is the approach to training and customer support?
- Is the pricing model flexible to your needs or all-in-one?

### Cost

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## TECHNOLOGY LANDSCAPE

# [ SALES: RESIDENTIAL ]

**These solutions help provide a better customer experience and can help streamline your sales process. These solutions are often adopted post-CRM implementation.**

### How do people use it? What problems does it solve?

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People use these solutions when they have a sales strategy in place to help them become more efficient while providing an elevated experience to the customer. They can often help you estimate quicker and more efficiently, produce sales documents like proposals/contracts, and capture payment and/or submit for financing. These solutions can allow the business to grow and scale quickly while offering protection to margins and profit.

### What To Ask

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- What do people love about it? What do they wish it did better?
- What does onboarding look like?
- What does training and support look like post-onboarding?
- How customizable is it?
- What trade types can it support?
- How much control can I have over what the sales reps do?
- What integrations are available?

### What To Consider As You Scale Up

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- How well does it support multi-state/locations?
- How easy is it to make changes?
- How much access do I have to support?
- What are my constraints with APIs, Webhooks, and Integrations?

### Cost

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## TECHNOLOGY LANDSCAPE

# [ TAKEOFF SOFTWARE ]

Takeoff software is used to upload blueprints and conduct a quantity takeoff using a database that can be customized to include parts, assemblies, equipment, and services. To expedite the takeoff process, make use of features like auto-count and plan overlay.

### How do people use it? What problems does it solve?

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Ways you might use takeoff software in construction might include:

- To measure different roof areas to price each material needed accurately
- To measure wall and perimeter lengths for accurate cost estimates
- To count roof penetrations
- Other flashing details

### What To Ask

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- How efficiently does the software work when working on a takeoff or an estimate?
- Can you use the product along with estimating or project management software?
- Is the software accessible on different devices?
- Is the software easy-to-use yet powerful enough to get the job done?
- What training and followup support is offered?

### What To Consider As You Scale Up

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- If staying on Excel spreadsheet estimating, then take-off software will enhance your estimating process.
- Are we ready to bypass a take-off software and purchase a full estimating software?

### Cost

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