



ADOPT TECHNOLOGY



9/30/2020

How to Adopt Technology into Your Business

MODERATOR:

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PANELISTS

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Heidi Ellsworth:

Hello and welcome to Roofer's Coffee Shop, RLW. My name is Heidi Ellsworth, and I'm an RCS partner. I am so happy you are here today. And for those of you who came in early, thank you for staying. I understand we may have had our date cut out there on GoTo a little bit early, so thank you so much. We're so excited to have you today. We're very honored to welcome today John Kenney of Cotney Consulting Group. I have to tell you if you've never heard John speak before you are in for a treat. He really is one of the leading mentors, coaches in the industry and really understands roofing from the very... I mean, the whole nine yards of roofing. So we're going to talk about that today with technology and how it makes sense in roofing.

Heidi Ellsworth:

And he's going to give you some really straightforward answers of how to start adopting it. This is going to be an informative RLW on understanding and sharing that information about technology to your whole team. So thank you so much. And before we get started, let's start with some housekeeping items. So all attendees will be muted. So feel free to ask questions or comments in the comment area of your webinar panel, which is somewhere on your screen, hopefully over to the right. At the end of the webinar, we will have a Q&A segment where we will gather questions and share them with John to answer. So please put your questions as you go, as you think about and put them in the question box, I'll be monitoring that, and you can also write things in the chat. So whatever you may need.

Heidi Ellsworth:

This webinar is being recorded and will be available online and with all of our RLWs, you'll be able to read it with the transcript. You'll be able to listen to it on a podcast and you'll be able to watch it as video anytime on demand 24/7 on Roofer's Coffee Shop, RLW listen watch navigation. So today let's get started. I want to hear some more about this technology coming from John. So as we get started before, I would like to introduce John. John Kenney has spent his entire career in roofing. He started out as a roofing apprentice and as we talked about with really understanding roofing the whole nine yards, this is why John has been involved from starting out as an apprentice to chief operating officers and today he is the Chief Executive Officer of Cotney Consulting Group. Cotney Consulting Group is there to help the roofing industry build their businesses in a smart and sustainable way. So John, welcome to the show.

John Kenney:

Well, thank you. I'm glad to be here today. Hope everybody is doing well in there.

Heidi Ellsworth:

I'm glad to have you as always. I love our conversations. So this is going to be, I think, something that people will be watching for many years as looking ahead on how to adopt technology, but let's start right now today with the current state of technology, what are you seeing?

John Kenney:

Well, I always like to... If anybody follows me or knows me, I love to dig into data. I always feel data can never lead you wrong as long as you look at it in a pure sense it's meant to be looked at in. So we go back through a couple of the studies throughout technology throughout all industries and construction

ranked second to the bottom of the list of industries that embraces technology. And the only one that's below us is agriculture and hunting. So I had to look at exactly what that means. Does it mean hunting in the forest or actually means raising farm animals and growing crops. And then under the construction category, roofing is at the bottom of construction. So we're about as low as you can go for adopting technology, which itself is kind of scary and crazy at the same time.

John Kenney:

So those every other industry in the world and in our nation is above us except for planting and farm animals. So that's very crazy. So looking at that I decided, okay, we have some technologies out there. We have good technologies out there and how are they being used? I think from what I've been talking to a lot of roofing contractors around the country is even when they do get technology they're not properly using it either due to they were not trained correctly or they purchase something they thought would do something different than what it really turned out to be. So I think that's part of the problem. We've been slow to adapt. It's like buying a new phone is great, but if you don't add a use to it, it doesn't do any better than the one before.

John Kenney:

But then along came COVID. We are all aware of the changes that we have going on in our world. COVID put us in a position besides the lockdowns, they were tough enough, but we had to learn to communicate with our jobs, with our field, with our admin employees working from home, we had a whole new change that came in overnight. So by being behind in a lot of the technology, I think you saw a rapid rush to try to get as much implemented as could be possible. During that time, I knew we were extremely busy working with a lot of companies and trying to get them up to speed in the best way to adapt it. But I think due to the COVID coming in, I would certainly hope that the next time they do this study in a couple of years, I'd love to see construction and especially roofing be up towards the top of the technology leadership.

Heidi Ellsworth:

John, I find this all very interesting too and I would love for you to share just on this slide on the current state, when you were talking to all the contractors you're working with, we've been hearing that the contractors who had adopted technology before are the ones who have really been able to kind of keep everything going without any big stalls. Are you seeing that also?

John Kenney:

Yes, that's correct. Off of the few percentage that have, I want to say, embraced it and really led in technology. And there's a lot of companies out there that we're leading in doing online meetings with their staff and communicating with their field and having processes. And it all comes down to having the processes in place on how to use the technology. Those who had them in place prior to COVID absolutely had the least amount of issue navigating throughout especially the first 60 to 90 days. I think that was the most critical. After that things kind of morphed into almost what we're going through now. It kind of got to a point where we almost considered it to be our norm. But definitely I agree with you on that, Heidi.

Heidi Ellsworth:

Yeah. We've been seeing that very much so that the companies that had already been adopting definitely had a head start, but that everyone is adopting. So for those out there who are really looking at what they should be doing, this next slide, I just love John and I'm really excited for you to talk through it, but what do you see as the top five technologies that roofing companies should be looking at?

John Kenney:

Well, remote working again, try to keep up on studies in that whether it's through human resource organizations in different ones, remote working especially in your admin sense, because of course we never considered a map, but your field employees have always been remotely working. They're out somewhere doing their thing in a home office. It can be anywhere from five miles away to hundreds of miles away. So they've always been a remote type working, but now with people working from home and I think all the studies show you're going to continue to have a percentage of people working from home or not in the home office. So secured networks and VPN, virtual private networks that's was at one time really hard wired, a little bit difficult to get together. You have a lot of internet systems demands, but with VPN secure networks now and cloud based software is extremely easy to use. It's very well encrypted. Hacking is not wildly.

John Kenney:

Like you see on TV, most companies that get hacked are the ones that still have in-house servers that they get into, but the virtual private networks and secured networks through cloud are very, very safe improving. So I think also just a little bit on remote working, I think it's something that the industry should be willing to embrace for different reasons. Not just a concept, it's great. You can have some people working at home, but actually use it as an example, say that you find somebody that's a really, really good estimator and they live in another state and they really don't want to move because the spouse may be doing something or the family with the schools, wouldn't it be great to be able to bring that person onto your team through the best collaboration software that you can put together and have everything there so that they feel like they're part of your team and you have good communication with them, and you're getting the benefit of a top notch employee that may be in another location. I think the future is really bright if we look at it in that way.

Heidi Ellsworth:

I agree. That is so true.

John Kenney:

And then which brings us in at a collaborative software. I mean, whole thing is what that really means in a nutshell is that you properly communicate among your team without emails. Emails are going away. I know that's a bold statement. Probably a lot of people heard that, but it is actually a fact. Emails will become a thing of the past that we will only use at limited things, which is good. Emails I know and like everyone else, it's hard to keep up with. When I was in a COO role in the roofing company, I would get three to 400 emails a day and it was cumbersome just to go through all that. And that was besides the junk that was being taken out. So I think it's like, you got teams, you got Skype, you got all different types of software, messaging services. You have very

secure. Those are nice. And then we'll get into a little bit later with Smartsheet, but right now, any kind of collaboration software as well.

John Kenney:

Project management suites, extremely important that you got a pulse on what's going on in your operations. You should not only consider your project management suite to cover what's going on for just your job schedules, it should be where your job is at all times. It should also connect back in with your administrative staff as well, so you're getting full collaboration in and know where your projects are at lifetime. Forecasting software, this is something again, I was reading a study when you get into AI and forecasting, proactive not reactive, predictive analytics and predictive technologies, we in the roofing industry, not speaking from construction there, I'd looked at the roofing, we are still operating in that mindset from the 1970s.

John Kenney:

Basically what I mean is you're looking back on your job history and you're doing a post job review or you're doing some kind of review of what either went right or wrong in the job, which is really Monday morning quarterbacking after the game's gone over with. So you can either say you did a great job or you didn't do a good job. Hopefully you do want learn from it, but you're always going backwards in history and that's not really the best running a business. So with forecasting software, what that allows you to do is take all of this data that you have for historical and what happened and you program it in and you get your databases and so on. And that gives you an opportunity to basically look ahead and do a nice prediction of where the job should go, where it should be based upon your historical operations of your company and you know what to do and what not to do.

John Kenney:

So you can kind of make or kind of you will be able to make educated assumptions of what is the best projects for you to take on and what to do. And that can only be done through forecasting. And then your AI artificial intelligence and augmented reality, they're coming big time into our industry. Artificial intelligence is really in a simplest form. It's computers that do a lot of the brain thinking and a lot of people get scared by that or how does that really work? But I always like to put it this way, if you only had to do math every single day or bid your projects or keep your books on a pad and paper and a pencil, you're wasting hours upon hours to get the correct end result. If you involve your AI and your machine learning to do all this crunching for you, what could take days to do or even weeks in that matter, you now can get done basically in a matter of seconds or minutes.

John Kenney:

So very important as we go along and grow in technology in our industry that we adopt these technologies. Augmented, we're starting to see that companies are experimenting with that in different aspects and a way I like to look at it is we have safety training through augmented reality which is great, runs you through the experience of safety without even experience what can happen if you get near fall on a roof without putting anyone in danger. But let's look at this from a workforce standpoint. Workforce is gaining age, it's getting older, retirement's coming, we've got lack of workers coming into the workforce,

which is something we need to work on, but let's say we've got a workforce out there and they're working on a roof or let's just use a simple example, they're out trying to fix a leak and find a leak.

John Kenney:

You've got your veteran out there who really doesn't want to climb anymore. He's at that age or she, they're ready to move at that position, putting them in an office, you don't want to put them out to pasture. They got ready to retire. They can get on this technology and walk that roof with your tech and see firsthand what's going on and be able to circle things right on a screen that's live back to your tech at how to fix a roof leak. So you're giving them lifetime experience and on the job training and you're giving great customer service. So those are just a few things where I think you're going to see in the next couple of years really take off big time.

Heidi Ellsworth:

Yeah. I've been seeing that same thing, John. I love this list. I think these are all the things that just have to happen. And around peak time, I think people see AI or augmented reality and they're kind of like, well, that's not me, that's really far away, but it is as simple as doing your safety training using VR goggles. And we see a lot of this, I know you're involved with Roofing Technology Think Tank as I am, RT3 and so you're seeing a lot of the contractors out there who are adopting this.

John Kenney:

No doubt. And we do a lot of work working with the Canadian Roofing Association and working over with some of the roofing organizations in Europe, which is great to get that worldview and everything. And sometimes we get into the technology. There does seem to be a very good consensus among almost the entire world on this, that prior to COVID a lot of these things, if we were just operating as normal, COVID wasn't here, a lot of these technologies may still be 10 or 15 years away before we start to adapt them full swing. Everyone agrees now what was 10 or 15 is probably down to two to five years.

Heidi Ellsworth:

Exactly.

John Kenney:

COVID has absolutely sped up technology and I think definitely for a good reason it's going to push it there. I know even over in England, I was reading a study on the labor force problems they have over there, they actually really expect robotics to take off big time to replace the workforce that they don't feel they're even going to have to come in. So they're looking at, let's say, around 2062, 2067, where probably two thirds of the construction workforce is somehow replaced with a robotic workforce. Not saying it's going to be robots running around, but some sort of robotics to narrow it down where you have less labor power needed.

Heidi Ellsworth:

Yeah. And we're already seeing that. And speaking of really working with different programs that can help you save on productivity, not have all the duplication or the redundancy in that Smartsheet. So I'm really excited. Tell us a little bit about this.

John Kenney:

Yeah. Smartsheet, we work a lot with that in... It covers almost any industry, but we're going to focus on the roofing industry and construction because that's where we really take it to a new level. So it has cloud-based collaboration. So what you do is you get to set up, your Smartsheets is available to anyone to purchase through their company. They get licensed like any other cloud software and then you have this program in front of you. So we decided to work with roofers and develop other construction as well. But in roofing, we can do everything in there to get you on line collaborated from your human resources, to your administration, purchasing, contract administration and the most amazing part is to get your field evolved in this. So you feel then operations it's not just a Gantt chart where you're doing scheduling.

John Kenney:

You can have live updates from your foreman through forms and your apps on the phone. So basically if you have computer access, laptop, smartphone, tablet, iPad, any kind of electronic advice that has access to the worldwide web you're hooked to your home office, it doesn't matter where you're working, fully secured. We'd love to see when we get feedback from companies where their field's out there and good example is it used to be before somebody would call they'd run and get materials, PO would be written after the fact. Now your field is able to enter in exactly what they need, how much material they may have on the roof, what the outlooks are coming up. So again, you're getting into proper planning and we all know in this industry, if you can plan properly to become more efficient, you're going to put more profit into your business, which again, you're able to reinvest in to your company and your people.

John Kenney:

And KPIs and forecasting, where that comes in, KPIs is an abbreviation for key performance indicators. Fancy term, really all that means is you have some industry standards that you can set your company as goals by to see where you stand. But what we like to do with Smartsheet and what you can do with it is you take your data. We look at where your key performance indicators and so you could base it upon any part of your operations of your company. It could be based upon weather seasons, type of customer, whatever you want to base it upon with your profitability and your financials that is set up as key performance indicators. So you have those set up on your dashboard, it tells you what your operation status are and then it takes your current data and you can see where you're performing to that. So if you're performing better than your standard, you're having well and if you're not, then you know you need to kick it in the can and whatever you got to do.

John Kenney:

And it also again, forecasting comes into it as all that is in front of you on a nice dashboard. And you're also able to access it through data because everybody looks at things differently. Some people rather review on graphs and charts and other people like to deep dive in the data, all that's available in whatever format works best on Smartsheet for you. Safety management and quality control, that's a great aspect. So how would that work? So you set your suite up, you have your safety director, your safety person in charge, they can do their safety reports right online, information goes in, you can set up a grading system on how well each one of your crews are doing so that you're able not only to track

your performance and operations and how you're doing, but also how your safety performance is going.

John Kenney:

You can also track how many whatever you write up as your violations that your standards are being broke. You can track all that. Quality control, this works great if you put somebody in charge and I recommend every roofer does put a quality control plan in place and has set standards. When you go out and do your inspections on your own roofs and you can actually set your own standards and you can track as simple as grading as A, B, C and D, you can see which one of your crews are producing the most A quality work to B quality work. And all this is lifetime. If you're inspecting 10 roofs in a week, you're going to get instant data in front of you on your phone. And I know I use the phone a lot. The phone app is the greatest thing in the world with Smartsheets for approving payments, approving things to be done. So it's really a good tool to use.

Heidi Ellsworth:

Wow. What I love hearing too is how you are adapting it, this cloud-based solution to really fit roofing companies and also to be something that's on the go because even with COVID we're still, you're out in the field, you're moving, so much is going on that you need that phone or tablet. So what a great solution that has been there for a while, right?

John Kenney:

Yeah. I mean, Smartsheet itself probably started in early mid 2000s and then of course they developed it up. And I discovered it by watching a webinar, looked at it and then worked, I said, "Okay, it'd be great for keeping schedules." And it's like one of those things you got to kind of kick it a little bit and say, well can it do this? Can it do that? It does and you start to experiment with it. And then finally, if you know me and one thing, efficiency is everything especially in the roofing business. We focus a lot on productivity and efficiency is completely different, but if you increase efficiency, that's where you get your most bang for the buck.

John Kenney:

And any time we can take and even an admin person can do in less time and it's not delayed, that's more efficiency to do something better in your company. So that's the whole purpose of Smartsheet is to work alongside of your team, to make them more efficient at doing what they do best for your company. And that's where every... I mean, if you're efficient at your job and you don't have to spend time fighting through spreadsheets or fighting through emails you got a happy worker, you got a happy worker, you got a productive worker, you got an efficient worker, guess what? You've got a great team. You're starting to build a great team.

Heidi Ellsworth:

Yeah. And you're able to see it and you'll be able to do it. So along that it's really this using predictive analysis in business. Again, sometimes a scary thing but really on something that they can use to build their team. So tell us more about this.

John Kenney:

Yeah. So we came up with a system using Smartsheet as a backend and then built our formulas and all the good stuff that goes behind with machine learning. We won't spend time on that. But what we're able to do is we have a

lot of industry data. Personally, myself, I've been collecting data over 40 years before we were even online. I've kept studies. I've purchased studies over the years. I've done it myself. I have all this data. So that kind of gives us an industry benchmark at where certain things should be. So we put that into the system. Then their magic comes to come out to your business. We take your historical data, we sit and kind of figure out what you best want to get out of it. We can take your data and feed it into it.

John Kenney:

So it does all the math calculations behind the scenes and everything and we set it up to come out with reporting in a lifetime dashboards for you. So the best way to explain this is like you have market strategy. So we're able to take this data and let you know what your most successful at selling, performing and profitability all looked at in a bigger scale so that you have it in front of you to know which combination produces the best results. So there you can use that to drive your marketing strategies or what you want to go after. Types of roof systems installed, how we want to do that and we'll look at that kind of in combination with the sales teams. So to start at the beginning, we take this data. So let's just say you have an estimator, so we look at the estimator of what it's most productive on, what its best close ratios are, what is the most profitability?

John Kenney:

So that in itself, you can say, okay, I can get that through KPIs. That's correct. But that's only one part of the formula. Now we look at the same performance of your sales team if you have it. If you don't, then the estimator is considered to be that in your sales, but you have sales team. So they're taking which estimators projects because they're probably working with multiple ones, how are they doing selling it? What is their best close ratio and who are they working with to get the most profitable sales, which estimator? So now we have that data. Now we tie that in with the data you gave us from the roof systems you're putting down, the types of roofs, which foreman's doing it. So now we're able to give you this information and be able to tell you, if you take estimator A, put him with salesmen B and have foreman D install rooftop Z or whatever it is, you've got a 99% chance of being whatever your profit range that you'd normally want to operate on.

John Kenney:

And looking at it in reverse we can also tell you when you take a type of project and plug in, if this project that regardless what estimator, salesmen, roofer you use, you have historically not made money on this, there's no combination. But it also can tell you that, well, this is kind of a system if you do this with foreman A, you're probably going to lose money, but if you have foreman C do this job with this combination, you're going to make money and be very productive and efficient at doing the job. Now, how you take that and I know this is a lot but how you would take that is you then tie that back into what you're doing in Smartsheet with your scheduling and everything in your field. So you would absolutely want to make sure that your best performing foreman is available to do this type of job now that it's going to get sold.

John Kenney:

So you can take this information, know which foreman or which estimator is going to do and you now sold it, now you know which foreman which is the best foreman to put on it. So you want to make sure you have his schedule or her schedule open at the time his job's ready to go. So now if you put all that together, you're going to put more money on your bottom line. And that's what this is really all about, helping you become more net profit. To get more net profit into your business by making a decision through this predictive analytics.

Heidi Ellsworth:

Wow. You know what? John, that could be a whole segment all by itself. That is just so interesting. And I'm really putting the right people. We always talk about putting the right people in the right seat on the bus. This really takes that to a whole new level.

John Kenney:

Well, one thing I can tell you Heidi, I'll let you in on this today for our listeners that are in on this, we haven't released this yet, but I've been working with a partner that specializes in how you do... They're not DISC but you do your personality tests when you hire employees and all that. So we've now figured out a way to take that data and also plug it into the AI so that you're able to know by if you already have these tasks run on your existing employees, we have that now as data. So we know which one of these top performers fall into what category each one of these categories. So when you're hiring somebody, we're able to be able to tell you, not just from the data that comes out of these tests, but we're able to plug them into your system and say where they're going to fit best and who are the possible combinations they should be working with.

Heidi Ellsworth:

That's phenomenal. I did the DISC, those are a great way to really bring your team together. And I just want to say to everybody out there we're going over a lot of different things. This is a pretty high level as we go through these questions, the different technologies. So please, don't forget if you have any questions type them in so you're on because I have a feeling we may have a few on this AI towards the end. So be sure to type those in, because we are moving on to talk about marketing. One of my favorite things. So, John, what are you seeing with technology and marketing?

John Kenney:

Well, I think it's definitely moved to new levels and that's another thing I think which COVID definitely brought in. Social media is probably a lot bigger part of getting your information now than it ever was. We're going into using technology for promoting your businesses. I know we heavily do that and the trend seems to be growing. I don't think it's ever going to go in reverse. I think it's something that we are still in infancy in my mind that there's so many different things coming out. It's hard. It's even hard to keep up with I think if that's what you specialize in. Every day or every week, there seems to be new technology focusing on more pinpointed brand marketing. So I see the trends positive in that if it's used right, giving an example and I'll throw this out there.

John Kenney:

On LinkedIn, I hate seeing stuff that is just broad base thrown out there, garbage media, you know what I mean by that. But I think it's a great tool for getting information out properly and getting your message out and a good

message for the industry. So I think roofing, NRCA does a great job with a lot of the organization. You guys do a great job with it. I think we're going to get a lot better viewpoint in the marketplace of what roofing and technology and where our industry's going to go in the future based on this.

Heidi Ellsworth:

Yeah, I agree. This is really becoming one of those things that is setting us apart and roofing having been so essential, people realize they have to do this. They have to be out there. They have to use the technologies that are there. And it's really true on sales also. What are you seeing on that side? Because sales and marketing, it all goes together.

John Kenney:

Yeah, absolutely. Some of your tracking, your marketing, like we talked about so you set that up, you can have your dashboard on that, it kicks back over. CRMs surprisingly, there's a lot of that... That I shouldn't say not. There's a lot of roofing companies that we spoke to that do not have any CRMs whatsoever. And then there's a pretty good percentage of them that have some sort of CRM. They don't know how to use it properly. And this is them admitting to us, this isn't our analysis of it, which is really surprising because CRMs have been out for years in different areas. So I think getting a good CRM practice in place, you have to have a CRM. You need to track your customers. You need to track your salesman. You need to track your estimating. You got to start with a CRM.

John Kenney:

From that, you can get your data. Like what we do is we pull that data directly out of your CRM, put it into Smartsheet so you can compare it to your KPIs. So on KPIs that are important on this in front of your dashboard is your estimating close ratio. How many particular jobs they're bidding, what jobs are closing on, what maybe gross margin? You're tracking, you're closing on re-roofs, new construction, repairs. These are all things you want to keep your finger on the pulse to know where you're going.

John Kenney:

Yeah. And from this information, you're able to really hold a quality sales meeting on a weekly or twice a month basis, whatever works for your company, where you're able to get this information, your sales team should have these dashboards as well to track their personal performance so that you set your goals and everybody meets it. It's all saying you can't improve unless you track. So you got to track and then you can improve. So this is really a great tool. People that we've worked with and I know myself, I've been a big proponent of tracking, estimating in sales statistics with the people that are doing it. So we have a lot of success with this and I recommend if you're not doing this, this should be your first step is to get your CRM in place and start getting these things in place.

Heidi Ellsworth:

Yeah. Because you need that data and you need to know who your customers are. How many contractors do you go in and still see files and files and files and files and unfortunately that takes a lot of time and a lot of summer interns to get all that into your CRM.

John Kenney: Yeah. And they've lost the job. By the time they realize to follow up because they got to go through file stacks today, the world's moved ahead and if you're not there, you really have to catch up to it.

Heidi Ellsworth: Yeah. That is for sure. So let's go on and talk about operations. I know you do tons again on the KPIs and the operations and bringing all this together. Tell us a little bit about that.

John Kenney: Yeah. Operations, they're all these historically in our industry is that there's a disconnect between how a job is being looked upon or looked at in your estimating and sales and management and what actually gets down to the crew and the form and that's installing it. We don't do a good job industry-wide of getting all the information to them that they need. If we don't get all the information to them that they need, we're setting ourselves up for failure. The job's not going to perform as you want it to. And let's face it, margins are tight. They're always going to be tight. Competition is always going to be there. So again, this is where the efficiency comes in. So you can squeeze every bit of efficiency out of a process as you can and it just gives you a great area to move in to make money.

John Kenney: But it also works in reverse. We don't do a good job getting information back from the field into the management staff that actually needs to make these decisions to get this information. So what this does, this is your bridge. So you're able to bridge your sales, your management, your admin staff that sits somewhere else and you're able to bridge that to your onsite job. So all of this is lifetime collaboration. So if you need to, something happens, an alert will go automatically to your phone.

John Kenney: Nobody has to do anything, you set these things up. Alert will go to that particular team that needs to know about a PO that's been delayed or I'm going to need more material on a Friday. So I'm putting it in today or we set up a job inventory system which works really, really well, where your foreman can fill out this information of what material they're going to need the next day. And if you do warehousing, in-house or you have some inventory, that'll go back to the person in charge.

John Kenney: They can have the stuff palletized and ready to go by the end of the day, the next morning, boom, it's out to the job. Also works well with downloading projects. How much is left over? You can prepare for this because before you have your team leave the job, they're able to put all this information in to their little form on their phone. And it goes back into the Smartsheet and it sends an alert out to who needs to know what's coming. So all that really speeds up the process and it keeps people informed. Information is what makes any project successful only if it's shared properly.

Heidi Ellsworth: Yeah. That's it. And the collaboration of really making sure that everybody is on the same page and knows what they're doing and making sure everything's moving forward. I agree. That is just so important. And it builds right into

technology and for warranties and customer retention. And it really all works together.

John Kenney:

Yes it does. So keep your customers informed and also look at it, this is your internal customers too, internal customers are your employees. So portals and dashboards interchangeable term but the best way to look at this dashboard is I like to look at that. That's where your graphs, that's where your KPIs, that's where your information. You're going to go there and look at something to see if it's right in front of you. Is it good? Is it bad? It's not. I like to look at the portals. That's where your information happens. So this is where you not only can have portals for your internal clients, but your external. So let's use this for an example. If you're working, it doesn't have to just be service. If you're doing a re-roof or you're doing a new construction project, doesn't matter, whatever information your customers are interested in, you have it. I guarantee you have it if you're on this full system. So you're able to share them with a portal that they can log out in real time and only see what you want them to see.

John Kenney:

So maybe it's about when you're going to finish the job. Maybe it's the safety reports, if you've got good safety reports, hopefully you do, you want to share that because you want to brag with them. Your QC reports, when you go to an owner and you can say, I do my own in house quality control, and I'm going to share those reports with you, now, Mr. Owner, you may see a time where we'll go out and find something that's not right, we're going to make the correction, but we want you to see that because you're going to see that we're on top of our game and we want to give you the best quality.

John Kenney:

Now, imagine if they're tied into that onto their phone and somebody calls up the corporate office to the guy that's in charge of the job and say, "What's going on in my roofing project?" Well, he pulls up his phone, he's got everything there live. He gives him an update, like he's really on the roof and on top of it. So you can get your photos, you can get your data, you can get whatever you want through these portals. It's there for you to share as you need to.

Heidi Ellsworth:

And John, I think a lot of people sometimes are getting off put by the fact of dashboards or custom portals that just seems like a lot, but really this is a normal thing in life now. It's actually become so normal we don't even realize it. But when we go out to Dropbox or when we go out to Google docs or when we go to any of these places, those are the cloud-base portals, but it's just what you can do and what technology is doing and roofing is making that. So it is very specific to the roofing process.

John Kenney:

Absolutely. This is where it comes back full circle. That is information. So you got a happy client because he's getting the information he wants. So that's part of your marketing. It all ties in because now you're marketing to them what you're doing, they're going to use you. So it's starting to come to where owners are not only making decision on pricing or making decision on reputation, they're starting to make decisions upon what technology companies are using because they feel that companies, which a lot of times is true, that if you're at the

forefront of all this and you have all this at your fingertips, you are a better run outfit than someone else's. It's not always true, there's good companies that are slower on technology, but let's face it, we're beyond that now, you have to embrace technology to survive the next 10, 15 years that we're going to be going into.

Heidi Ellsworth:

Definitely. And I mean, forever really that's just where it's going. So with that in mind, let's talk about that... I'm sorry. I went one slide too far, but let's talk about that process for evaluating technologies. What should be roofing contractors be doing?

John Kenney:

Sure. And again, we get a lot of this from when we talk to people, "Well, how did you decide what you needed?" "Well, I went to a show or a salesman came in and we liked what they have. We bought it. And then we just can't figure out how to use it." Or, "We have three different systems. They don't talk to each other. I got one person and all they do all day is enter this data into all these systems and why do I want to do it?" So start from the very beginning. I liked whiteboard and you got a nice picture on there with a marker and a whiteboard but however you want to do this, either simple whiteboard on the board, which I still use. I still like to see it that way or if you want to do it on a software program, whatever works best for you, you need to sit with your team and you need to find out what they're doing, how they're doing it and then you go and look at the technology end of it to see what will work.

John Kenney:

So what we like to do is sit with clients and walk them through this process to get all this laid out. But you can do this yourself and again, it's basically kind of like the lean scheduling, lean construction theory. I like to see what's your end game. Start with your end game and say, this is the result I want to get to. This is where I want to be. I want to know this, this, this, I want to see this. I want to be able to do this. That's your goal, set it. Then you got to go backwards to figure out how you're going to get there through your different departments and what your procedures are that you're using to do. That's when you can bring your software in to solve those problems, that's what software does. It should do, if you're not getting that out of your software, you really are wasting money and time, but you want software to solve your problems.

John Kenney:

So when we whiteboard this out or a client's white boarded out, you figure out what your end game is, you get your solution. So a lot of times and again, when we work with Smartsheets, what we do with that is that works with all software. So we're just getting your information. So if you have a favorite estimating software you're using, great. If that works for you, keep using it. Again on most times there's multiple accounting systems, but you've got QuickBooks, you've got Timberline, whatever spectrum you're on. If it works for you, great, keep using it. Same way with your CRM. If you have a particular CRM that you're using again, fantastic, use it. What we do with that is we may take this technology and connect it all together to gather that information behind the scenes with an API, which is basically just a bridge between softwares to gather it.

John Kenney:

So you can continue to use your softwares and tie this into another software to give you all the information you want. So looking at it in that way, that's the key. What softwares are you going to need to use and what is your end result you want to get to and what bridges and collaboration software do you need to connect it to to get you the information that you want to see and need to see to run in a profitable manner.

Heidi Ellsworth:

That's excellent. And really that has to include the whole team. And I think this is probably one of my favorite slides because I am, as you well know, huge on bringing the team in collaboration and here you put it, how important this is.

John Kenney:

Yeah. I go back before we had computers and all that as a lot of us do and as this stuff started to come in, and now that we're going to the next level, you can't force technology changes on or you shouldn't because you can. But what you want to do is get with your team, get their input because if everyone buys into this, it's going to work. If they don't buy into it, you can have the best solution in the world and it's going to fail. So a note, whenever you put on any kind of technology or major change, it doesn't matter what it is, whether it is estimating CRM, start out small. Get one person to be your champion in each department and that's the person that works in your work group. Work through it. They go back and work with their department and integrate it. When it is time to bring this up online only bring one department up at a time.

John Kenney:

It is so much easier to do it that way and then they're already successful with as you're bringing the next one up. What I've found is whenever we tried to put technology broad-based throughout an entire operation at one time, the glitches in the buy-in were horrible because you had people picking around saying, "This doesn't work." "Yeah, me too. I'm sorry we ever did this." But if you get one department up and they're having success, everyone else wants to share in that success and that's where it all starts to come together. You get buy-in and each department wants to out do the other department in how they're using it. I've seen this happen many times. It sounds like a pipe dream, but trust me, if you whiteboard it, if you onboard it correctly and you get team buy-in which you must get, you will be successful. That being said, if you have people on your team that refuse the buy-in, then you're going to need to make changes with whatever issues you need to do in-house, but you need to get buy-in. And once you get that success will come.

Heidi Ellsworth:

I've seen this John from a sales and marketing side, I've seen this for so long in that you'll get a really good CRM and maybe the marketing is putting in their campaigns and the sales team is just moving so fast that they're not putting in what's happening, right? They're not putting in that they've called them back or that they are closing the deal or whatever. And somehow that data just gets lost. And you're right, if everybody isn't inputting what's happening, you can't get the output of what you need to run the data and the KPIs that you're talking about.

John Kenney:

Exactly. And I've run even estimating departments and sales departments at different levels coming up through the years. And there's always people on the team that want to skirt by that, not do it and I always like to sit and have a chat with them and say, "You know what?" They're like, "Well, look, I'm successful." I'm like, "Well, how do I know you're successful? I have nothing to base your performance." Just because you're selling doesn't mean you're successful. That means you've got sales. If we're tracking what you're doing, then I know how successful you are on the amount of work that you're putting in to get those sales. And then I can work with you to help you become more efficient and get more sales with less effort. So that's a tactic that works very well. But it is the truth, besides not getting your data, people work too hard by avoiding the system.

Heidi Ellsworth:

That is so true. That is so true. Well, John, your timing is phenomenal. You're just so great because we're going to take all of this that you have. We've had questions coming in and we're going to go to questions because there is a lot right here that you just... I mean, we've talked about an overview, we could take each one of these slides and probably do an hour on them. So let's get started. The first question we had here was how does AI work and how would I see my data? Would it be on a dashboard? So how does that all work between the AI and how would they see the data?

John Kenney:

Okay, so the AI again, that's the machine learning that we developed. So that all happens behind the scenes. We developed particular formulas to process it. That's what really it is. That's where your machine learning comes into place. So that part's already done. It's getting your data into it, which again, it's your data. So it's going to come from your information. We work with you and help you clean that up to a format where it makes sense to feed it. So that part's pretty simple. It's not a big deal, as long as you keep records. So yes, to answer the question, yes, you will get a dashboard. So this will be on a dashboard but you'll also be able to look at it on a more deep dive report type basis where you can actually see how that's all put together, like who matches with who?

John Kenney:

And then what we do on a quarterly basis is review with you where you're at and what may have changed or what pattern changes. So there's also besides getting your data onto a dashboard and looking at yourselves, this program, we work along with you to help you pick up trends as they're changing, because as you're installing a roof every single day, you've got new sets of data going into this program. So your trends are going to change. There's no doubt about it. And we help you on how to understand how they're changing.

Heidi Ellsworth:

Right. And just kind of a followup to that question too on the dashboards, there also can be dashboards that are more specific to each department, right? So that they aren't getting lost in this whole big picture.

John Kenney:

No. So we like to look at it, we'll call executive dashboard that may go to your president, your owner or key senior management. You want that they may be overlooking everything. So that dashboard may have a lot of information on it,

or at least links into other dashboards with particular information. But yes, if you want it only for your service department, of course, you really only want them seeing the data for their service team, because that's all that matters and what help them. Your estimating team, they'll see what they need to see or your operations team, your accounting, whatever your departments are, these dashboards are easily customizable so they only have access to what you want them to number one and what they need to see number two. So it's very, very customizable.

Heidi Ellsworth:

That's perfect. That's perfect. And this next question kind of follows up a little bit on this, but I think this is just a great question. This person has a CRM but they are not able to pull the information they need for KPIs. And they're wondering, is this something that Cotney Consulting can help with?

John Kenney:

Yeah, absolutely. We do it all the time. Not knowing what the CRM is, but any CRM, if you can put data into a program, we can get data out of the program. And then we put it into, we run through the Smartsheet and create your formulas for your KPIs. And again, we can put them against industry standards or we create them what's customizable that makes the most sense. And that's a part of an evaluation that we do, which KPIs make the most sense for each company because they really are customized. Not everybody operates the same way.

Heidi Ellsworth:

Yeah, exactly. And so to follow that up, another question that came in was and this may seem kind of crazy, but looking at the picture on screen right now, it kind of maybe fits, but what kind of equipment requirements are there? Everything's cloud-based but what do you recommend? And can you also help with the type of equipment that they should be providing to all of their employees?

John Kenney:

Yeah. I mean, definitely your field employees, you can do this on a smartphone for sure. If you want them to have a bigger screen, which now some of your smartphones have pretty decent screens you can use them, but if you want to go to a tablet or an iPad, they have the bigger screen. So that's usually better for a lot of times in the field, but absolutely the forms and in your foreman and getting information any kind of smartphone works really well. Computers, again, it comes to what laptop you want to use. All this information sits in a cloud storage, so it's not really using your memory. It's not eating up any disk space or anything like that. So really all the performance issues are being handled somewhere else. So it really comes down to the preference, the size of screen you want, your favorite brand of laptop, those kinds of things. So really it works with everything. That's the beauty of the cloud. You don't need a lot of in-house horsepower to make this work.

Heidi Ellsworth:

That's excellent. Well, and John I kind of gave the introduction at the beginning, but I think it is important that we talk just a little bit here at the end on what Cotney Consulting maybe share with them how you go about it, how would they

get started, how do they talk to you, kind of what do you do maybe just to recap that again for our audience?

John Kenney:

Sure. Well, our main focus in Cotney Consulting is we do the business analysis. And we like to call it rolling out COO on demand, where we're partnered with you to come in from an operational standpoint, to look at your business because the experience and the years of doing it are what works best. So we're not going to come in doing an evaluation based on whatever Harvard standards, that kind of thing, this isn't book learning. We're going to come in and look at what you're doing, evaluate your procedures, evaluate what you could do to improve on those procedures and that's where once we... So that's one aspect. So how that works with the software is if you put these systems in place, Smartsheet, your CRMs, all this comes together, if you don't have the business procedures behind it on how to operate and then do it, you're not going to get good results with the data.

John Kenney:

So they go hand in hand. So we always like to work on it, we'll work on just the software end of it but we usually find the best way to do it is to tie the software in with what your operation. And again, it doesn't necessarily mean that we're going to come in and revamp your operations, but we like to take the time to get to know how you run your business so that we can design the best possible solutions for you.

Heidi Ellsworth:

And what I love about what you do with Cotney Consulting Group and Cotney Construction Law overall is you all give back to the industry all the time. So there is lots of opportunities, whether it's through roofing contractors associations, or on Roofer's Coffee Shop. We have offers on the coffee shop for a free 15 minute consultation. It's actually a longer consultation for our club members. And so people can really... I know for me personally, I like to have that chat upfront. I like to have that little talk before I kind of dive into things. And so it's really a great way to get to know you and your team better is just to sign up for one of those consultations.

John Kenney:

And there's no pressure. It's not like going out there and getting a timeshare. We're not going to hold your feet to the fire. If you got some information out of that consultation that can help you that's great. That's what we love to do is get the information out. We're there to help you, to assist you and when you're ready, we're there to be your partner. That's how we like to look at it.

Heidi Ellsworth:

That is excellent. Well, John, I want to say thank you so much. I've learned so much today. I always learn things when we were talking and visiting with you. And I just really appreciate so much you sharing this advice, this knowledge, really this wisdom with the roofing industry. Thank you.

John Kenney:

Yeah, my pleasure. It was great being here today.

Heidi Ellsworth:

Okay. Well, I can tell everybody out there, if you want more information on Cotney Consulting Group, guess what? It's on Roofer's Coffee Shop. So they

have a full directory in the directory section. You can find them always in our club member to be able to see him. And you're going to be able to find them throughout the site with great articles, with podcasts and with this RLW, which has been taped and that you can listen to anytime you want. It will be up on the site within 24 hours where you can read it, listen to it or watch it.

Heidi Ellsworth:

So thank you so much for being here today. Please spread the word, let others know about this great information. It's easy to share a link or share it up on social media. And please join us on October 28th which is Wednesday 11:00 o'clock AM Pacific. We are going to have the leadership from FiberTite here, and they're going to be talking about very severe hail. With the weather and everything that's been going on this year, we need to have all the right products to handle the hail and the weather and they're going to talk about that. So thank you so much for being here today, and we will look forward to see you next month. Thank you and have a great day.



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