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Technology To Buy Back Your Time

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- **Matt Baumgartner**, Sales Director for Job Nimbus

Heidi Ellsworth:

Hello and welcome to an RLW from Roofers Coffee Shop. RLW, Read, Listen, Watch. And today, you're going to be able to watch. And afterwards, you're going to be able to read the transcripts and listen to the podcast and watch the videos because that is the way we like to bring it to all of you to learn. So, today, we are so excited to invite one of the leaders in technology in roofing and that is JobNimbus.

My name is Heidi Ellsworth and I'm an RCS partner. And I'm here with you today to really start talking about how do we get more time back? Things are crazy out there. And so, today we have Monroe McKay, the Business Development Director for JobNimbus and Matt Baumgartner, the Sales Director for JobNimbus. Hello, gentlemen.

Matt Baumgartner:

Hello.

Monroe McKay:

How are you doing, Heidi?

Heidi Ellsworth:

I'm doing great. And this is going to be such an important discussion for us right now. But before we get started, I do want to go over a few housekeeping items. So, to all of you out there, you are muted, but please feel free to ask questions in the question box and we will answer those at the end of our presentation. As I mentioned before, this is going to be recorded.

So, you will be able to share this with your teammates and other people in the industry so they can also enjoy this. And finally, be sure, as I mentioned, to write down your questions or put them in the question box so that we can answer anything you have in your mind as we go through at the end of the presentation. So, first of all, again, I would like to introduce our today's presenters.

First of all, Monroe McKay, the Senior Director of Business Development, has 15 years at JobNimbus. I'm sorry, 15 years experiencing leveraging business relationships. He hasn't been with JobNimbus that long, but he's been making a huge difference.

Monroe McKay:

I appreciate it. Not quite 15 years. The company hasn't been around quite that long.

Heidi Ellsworth:

Not quite that long. We got to get that one right.

Monroe McKay:

But no, that's great, thanks, I appreciate it.

Heidi Ellsworth:

And we also have, as I mentioned before, Matt Baumgartner, who's the Director of Sales for JobNimbus. And Matt has been managing sales teams for over 10 years and has a really well-known reputation within roofing and

Both of these gentlemen are in the day-to-day thick of really helping roofing

contractors to get the right technology and to buy back that more time and improve productivity, which of course, we all know, leads to improve profitability and revenues. So, let's get started with our webinar today. So, as we're looking at this, technology is what everybody's talking about right now.

I mean, with COVID and with everything that's been going on, Matt and Monroe, if you aren't using technology correctly, you are really in trouble. So, Matt, I'd like you to start really talking about what are some of the trends that we're seeing in technology for roofing, and how are they all integrating?

Matt Baumgartner:

You bet. So, with the homeowners changing some of their comfort levels as well as the mass direction of where we're going as a consumer, people want to be able to have that easy access to information, be presented information the way they want to receive it, whether that may be paper, but more often times than not as a digital copy.

And from a company standpoint, the adoption of technology, especially when you're looking at integrating with some of the other companies that we integrate with, really, get to a point where you can run the majority of your day-to-day, right, from your phone if you wanted to. Let alone speed up that communication.

Be able to make it so that not only internally but externally, you're not losing track or nothing slipping through the cracks. Because you have the ability to take the process that you've been able to develop over time and put it into a repeatable system that's got a little technology to help you out and watch your back for you.

Heidi Ellsworth:

Yeah. That's so true. Because what we're seeing with everybody out there and I love it, you can do so much, right, from your phone. But moving from that paper to digital process isn't easy. And may you, Monroe, can you talk a little bit about that?

Monroe McKay:

Yeah. So, like you've said, I've been in building relationships for about 15 years. Unfortunately, not all 15 with JobNimbus, as much as I wish that would have been the case. But I've been in a couple different industries now. And originally, when I first started in my career, I was working with doctors. And everybody had a paper chart and it was all very paper heavy.

And I think a lot of people are very intimidated about making that switch into a digital format. And I think that's the case for anybody. When you're used to a certain process and its folders. And this is what we're used to that's, it feels intimidating. What we find over and over when we talk to our customers and contractors that have switched to a digital system, most of them say, I wish I would have done this sooner, right?

I wish I would have gotten this stuff together way before because once you make that leap, that jump, it just simplifies everything so much more. And

you're finding most businesses, small or large, are making that shift. One of the other things I'll say is, even for a small contractor, if it's two, three, four, or five people, I think if you start out or make the jump pretty early to that digital format, it's going to be that much more helpful.

Because you'll get your processes in place, you'll have the ability to really utilize the efficiency that that brings to your company. So, yeah, I would just say, it seems intimidating. One of the things that we really pride ourselves on, though, is helping you do that. So, taking your data from wherever you stored it, whether that's some spreadsheet or something else, importing it into a digital system, and then really helping you utilize that.

So, you don't have to be an expert by any means. You don't have to be super tech savvy. We try to make that a very simple, easy process. And ultimately, that leads to just a lot more efficiency, ease of communication, all those kinds of things.

Heidi Ellsworth:

Yeah. I know, having a small business myself, that it is hard. And especially I think sometimes the older you are, the harder it is to get rid of some of those habits. But really being able to automate processes, I think is so important. And Matt, what are you seeing from roofing contractors out there who are able to take those smaller tasks and automate them so that there aren't as many mistakes?

Matt Baumgartner:

You bet. And the impact of it is really, even more so, not only mistakes internally, but it comes back to that time saving. I often refer to as almost like having a little assistant sitting on your shoulder as you're walking around through your day to day, constantly reminding you, or in this case, automating those day-to-day things, the little things that really make a big difference.

Simple things like sending a thank you at the completion of a job and a request for a review for your company if things went right a week after, little things like that, but more so even, making sure that the jobs are staying on track, that they're falling within your timelines and your parameters, making sure that things aren't getting stuck or lost.

I talked with a roofing company, oh, I guess it was about two weeks ago. They do about seven million in revenue, and they had three quarters of a million dollars sitting in pending invoices to be paid. And when I asked him, when do you anticipate the invoices to come in?

His answer was, "I'm not sure. Some of it is with the insurance companies and waiting on insurance companies, some of it we've got to drive around and pick up checks, and do all those little types of things." And you can take all of that I'm not sure and build it into simple reminders for not only yourself, but your teammates, and even throughout your workflow and your process to give you back all of those I'm not sures, give you back that time, and give you the ability to make sure and know that things are being done.

When we talk about moving from paper to digital and we talk about automations and we talk about these things inside of our industry, and they've been done over and over and over again in other industries to the point where we couldn't fathom not having them in other industries yet. The adoption for technology in our industry is a little slower.

And I'll give you a great example of that. Paying your bills, for example, paying my bills, half the time I don't even know when they're coming out of my check. I just know they're going to come out. I know that my cable bills are going to get paid. And that's an automation that my bank allowed me to use, right?

Well, imagine to be able to do those types of things like, "Hey, I know as soon as I take this step, these four things are automatically happening and I don't have to go out there and do those every time. That's what automation gives you back.

Heidi Ellsworth:

Yeah. I think that's so important. And I think we all need it. I know I do. I'm the same way, Matt, all automated on paying bills. And so, so much of what we're looking at is, technology, we're already using in our everyday life as consumers. And then, how do you bring that into your business?

So, Monroe, can you talk about that a little bit, why contractors need this technology, and the fact that they're losing money by not being organized with technology?

Monroe McKay:

So, I think, as you look, time is money to a contractor, right? If you're losing time, if you're losing efficiency, if you're getting bogged down in details that are getting lost and different things like that, that equates to money. So, efficiency is a huge thing for a contractor just like it is for any other business.

Disorganization can lead to a lot of things where if... I think one of the things we find with a lot of our contractors is, somebody starts out and pretty quickly you're going to get busy and you're going to have a lot of things to juggle and to take care of. And it's pretty easy for some of those things to slip through their cracks. When you don't have processes in place, when you don't have visibility of things right in front of you, it's very easy to lose out on some of those details.

And the worst thing ever is, let's say that something falls through the cracks and you lose a job over it, right? What matters most to a company is the bottom line. And if you're not able to stay on top of those details, A, you might lose out on some of the existing jobs that you have, but you're not going to be able to grow and scale in the way that you want to unless you have some of those pieces in place.

That's one of the really nice things about technology, is that it puts it all in a very streamlined, easy-to-navigate situation. So, like I said, visibility is huge, being

able to look at the entire flow and see where everything is in the process, keep track of that, put in some automations like Matt talked about.

Really, it just streamlines everything, and you have that confidence and that peace of mind that we're on top of it, right? I don't have to constantly think, "Oh, shoot, did I miss something in the folder? Did I not pass it off to somebody? Did I not give somebody a call or a text?" That's all taken care of.

So, yeah, getting technology in place really is the easiest and best way to find that natural workflow. And building some systems that are going to make sure you're not losing out on information or opportunities.

Heidi Ellsworth:

And Matt, you saw the same thing, right?

Matt Baumgartner:

No, yeah. I mean, it's something that's been proven since, of a business model. I mean, you can go all the way back to the Industrial Revolution. And Ford, for example, building a step by step by step by step process, where they could take what they were doing and doing it well, and then speed that whole process up and be able to repeat it much faster.

Most of the contractors that we talked to understand roofing and they get the process, and they and they know it really well. They've got a process, has worked for them that has helped them scale to where they're at now. Now, you take that, and you'll be able to take your model, and organize that out into a way that you can start plugging new people into your model, having the organization to be able to make sure that that's all happening near real time.

You are able to take a proven business model and bring it into your roofing company or your construction company, and speed up time to cash, profitability, loss of funds. But ultimately, the organization that makes your life easier, that gives you back that time to go on vacation, they let you spend the weekend with your kids, to do all that kind of stuff, technology's the thing that's going to give that back to you.

Heidi Ellsworth:

Yeah. And I love that, too. Because we talk a lot about building business profitability, revenue and stuff, but it's just as important to have that lifestyle to be able to manage your business and be able to spend time with your family and do the things that you love. And so, I think that's so important. So, on that note, we are bringing something for the first time in, I know a lot of other people have done it.

But for this RLW, we're going to do a poll. And so, we want to know where all of you are at. So, we're going to launch that first poll. And it's a very simple question, do you use a CRM? And so, we're going to give that just a few minutes. You know for those out there, when we say, CRM, I know you already know this, but Customer Relationship Management, right, Matt, Monroe? That's the whole CRM?

Matt Baumgartner:

Yup. And it can take a lot of different meanings. Like Monroe mentioned, your doctors have a CRM, your banks have a CRM, pretty much every industry that we're used to dealing with now has a way to keep track of their end users. And that's ultimately what a CRM does.

JobNimbus takes it one more step and gives you the ability to create that hub-and-spoke model where we become not only your CRM, but the central nervous system for your business data and communications and processes.

Heidi Ellsworth:

That's right. Megan, why don't we go ahead and see how we did on that poll? And here it is, yes, this is awesome, 82% are using a CRM and 18% are not. So, for the 18% who are not, I'm so glad you're here today. I think you're going to learn tremendous amounts. And for the 82%, I hope you also can take away a lot of questions as we continue to move through this. That is great.

Matt Baumgartner:

Yeah. That's a tribute to your listeners and to those that are interacting. The industry standards definitely do not reflect that type of thing. We see somewhere around 40-ish percent of people who are implementing technology into their business. So, we've got a large portion out there that if you're not using technology, that gap is widening.

And if you are using technology, making sure that you're using it correctly, and using it to make your life easier rather than add another to do it for you, can definitely help and just takes us into our next-

Monroe McKay:

I was going to add to that, Matt. If any of those people who answered, yes, they are using CRM or using JobNimbus, keep in mind we are more than happy to help you make sure that you are getting the most out of the system. So, like Matt mentioned, if you've got us or another CRM, make sure you're getting the most out of it.

There's probably a lot there that when you first get into the system, you don't know everything about it, and you shouldn't be expected to. But we've got experts that'll help you really dial that in and utilize it to the best functions that you can get.

Heidi Ellsworth:

Well, that's perfect. And actually, thank you. And I know we're waiting till the end for questions and answers, but every once while you have a couple here, and we have one of our listeners who is saying, "I would like to hear more specifics on how the app operates and understand the importance of technology."

They hear and understand it's important. Obviously that poll showed it. So, thank you. So, let's talk, let's move on to that. Let's talk about the estimating pains. How specifically are we on able to, Matt, take it from the Excel spreadsheets and make that pain go away, use this technology to have some really smooth estimating.

Matt Baumgartner:

You bet. So, inside JobNimbus, you've got a couple of different ways to help that, or to accomplish that end goal. But using technology to have your pricing sheet at the end of your fingertips to be able to create a repetitive process like most, I shouldn't say most, but a lot of people are doing in Excel.

To be able to put that inside your customer's file and never have to leave the customer's file. To be able to create in this case, an estimate, based off of a template, most of the time we're working through a similar step or a similar process on a lot of the repeat work that we're doing.

And we have the ability to take all of that pricing, all of the overhead, everything that you need to do and put it into a template. So then, it's just a matter of a few updates, double check your estimate in this case and push it through. JobNimbus can take it a few steps further and take that estimate and build an invoice from it and a material order.

You can even push it out to a work order and send that off to your subs or internal, however you choose to do that. So now, not only are you creating an estimate, but you're creating an entire back-end financial piece by using technology to pull what you already have if you're using something in Excel or what you're used to using on pen and paper.

Again, real-time pricing, saved in the system, giving you the ability to create a process that delivers something in the hands of an end-user that looks professional. That looks like you had spent a lot of time and money to go through and build it out. I recently had my windows replaced on the front of my house due to some sun damage.

But the largest window company in my area came out to do the job. And he came out and measured my windows, then left and went back to his office and put together an estimate. He brought the estimate back to my house. I signed the estimate. His crew came out and did the work.

And then, he came back after and picked up a check. In the whole time in my head doing what I'm doing now, going, man, this all could have happened other than the work itself, right on my doorstep, right at the start, all of the pricing, all of the measurements, everything, just click, click, click, and I'm done.

When I had him come back out and hand me that piece of paper, even, I mean, granted I'm a little jaded because I'm in the industry, but I thought, man, there's just such a better way to do it. I can barely read his handwriting, let alone have that real professional feeling, so.

Heidi Ellsworth:

Well, and don't you see, and just for the audience out there, of course, JobNimbus and everything you're talking about is both residential and commercial.

Matt Baumgartner:

Right.

Heidi Ellsworth:

But don't you think the expectation of the customers is that they do, I mean, there's more customers than not who are expecting a more technology-based proposal, presentations, workflow, all of that?

Matt Baumgartner:

Oh, you bet. I think the end user is getting savvy. And in our industry, when you have three people knock on your door within a two-day timeframe, all wanting to do the same thing. If you present yourself in a way that makes it look like you're cutting edge, you've got these higher end proposals, you got those types of things, it just inspires that consumer confidence to help you really shine.

But not only that, being able to have all of this technology inside JobNimbus to be able to create that type of an estimate right there on the project, while you're out there doing it. Be able to take your iPad up to the door, tablet, whatever you're using. Have them look it over, sign it right there.

And email them a copy, rather than having to go back to your office and prepare one and bring it back to my house and have me sign in and go back to your office and create the work order. That's all done on the doorstep now. And so, if you can get through that stage, the chances of you losing that job, or somebody under-bidding you or all of those types of things, we start to whittle away at all of the different obstacles to net revenue.

I mean, it really comes down to net revenue, right? Can we create an estimate process that gets us through the process faster that gets us more consistent across our board, whether it's us delivering the estimate or our sales guys, and then being able to present that confident, that professional look to our customers. It all comes down to generating more revenue. And this is how you do it.

Monroe McKay:

One thing I'll add to that, Matt. One of the biggest things you've got as a contractor is your reputation. And like you said, Matt, if you've got three guys coming to your door and one of them gives you a great experience, that's going to be how you win, right? So, if you can create that ease of interaction with your customer, streamline it, make it simple for them, that's probably going to win you that job.

And it's also going to have that person telling their neighbor about you. So, yeah, I was going to put it in the terms of like, "What do we expect when we interact with a business?" And more and more, it's streamline, ease communication technology. So, that's what our customers are going to be expecting as well.

So, the more we can do that, the more we can wow them and hopefully turn them into a raving fan that goes out and brings some additional business our way.

Heidi Ellsworth:

Yeah. And I love when we were talking about the papers getting lost, things taking up space. And really, that's what's creating so much of that back and forth of what you're talking about, Matt. And so, I'd like you to keep going on that a little bit. And Monroe on... but let's start with Matt on the sales and estimating bottleneck.

How that it goes from estimating and then the sales and that bottleneck and not doing it the right way? How does JobNimbus or how are you, guys, seeing technology solve some of those problems?

Matt Baumgartner:

Well, there's a couple of different ways that JobNimbus and technology as a whole is going to help you do this. One, right on the login page, so there's a sales leader's dashboard. You can have it pull up, be the first thing people see when they log into the system.

That's a really easy, quick way to identify who's selling the most revenue, because you got a chart that's showing you real-time data. You know, my guys here, my sales reps, live and die every single conversation that I have with them. It's like, "Oh, I'm in second place, but I'm about to get the first place." Those types of things, it's a really big motivator for my guys to want to internally compete.

And that will hit all three of these bullet points from revenue to close rates. But the one I wanted to really touch on is which jobs are sold and which jobs are in estimating, how much money are we expecting to receive and where are we losing them and where are the jobs falling apart, and is one marketing source doing better at a job than another?

All of this bottlenecking in the sales and estimate timeframe can be solved by simple processes, by making sure that we're going through A, B, C, D and F. And take this experience real quick compared to the one that I got with my windows guys. A new lead comes into your company. When you create a lead in JobNimbus, you create a customer card in JobNimbus and assign it to one of your sales reps.

An email then goes automatically to the homeowner and says, "Thanks for choosing us. Here's a picture of your sales rep. Here's what you can expect when they come out for your initial meeting. And we look forward to seeing you." And your guy shows up on time, because he's getting reminders. He's getting calendaring. He's getting it all he shows up. He does his measurements and creates an estimate right there on the doorstep, hands that estimate to the customer. The customer signs the estimate. He goes back to his truck and clicks a button on his phone. And it sends another email to the customer with a copy of that estimate that he just signed, and a thank you for doing business with them, right? Now, that goes from this back and forth and back and forth to my customer has been communicated twice. They've already got the documentation in their hand. I've already got a signature. And everything is

already in the system. Now, we're ready to rock and roll. Now, we go from lead to inspection, or to measurement to sold, to etcetera, etcetera, right? And that's where some of the profitability pieces come in. And if you're the 80% that's using a CRM, or indefinitely those that aren't, if you don't have that ease happening, you're doing yourself a disservice. Because now, you're working harder for that same dollar amount or maybe even less in this case. But having a visual representation, consider a giant whiteboard, right, and I know that's very common in the industry, to see where everything's at. But having that in the palm of your hand, to be able to see where everything's at, see where it's stuck, find out who's closing, who's not, all right from your phone or from your desktop, speed the data, speed the data equals revenue.

Monroe McKay:

Yup.

Heidi Ellsworth:

Wow. And Monroe, any thoughts on that, just getting past that?

Monroe McKay:

You got it. Just to add to what Matt is saying. So, the experience Matt's talking about even internally here at our company, visibility is huge, right? When you can see something, when you can identify it, then you can address it. So, when you have a dashboard that pops up right in front of you from a management perspective, you can dig in and say, okay, great.

So, I got my two, three, five sales guys, and certain guys are doing really well and other guys maybe are struggling a little bit, timing wise, let's figure out why are these one or two guys really successful and why are these other guys not? Now, I can see what the issues are. And I can go in and address them. And one of the hardest things is when things are not turning out the way we want. And you can't really identify where the issues are coming from, right? So, when you've got that visibility, you can dig into it. You can actually see the data that's behind it as far as how many presentations have been given, conversion rates, all those different things. So, yeah, the visibility is huge when you can actually at a glance see exactly what's going on in your company. It really helps you identify, okay, here are the areas we're really strong, here are the areas that we need to work on. And this is what we need to do to get ourselves in a better position.

Heidi Ellsworth:

I think that's good. And that leads us right into that whole concept on being overwhelmed, which we've talked about. And so, Monroe, you touched on that, but Matt, maybe you can talk a little bit more about how JobNimbus is helping with that to help them get past that overwhelmness.

Matt Baumgartner:

Sure. And I hear it every day, excuse me, especially when dealing with those end contractors and seeing some of the people who don't have a few hours a night to themselves, let alone anything else. And the answering a phone call to find out where a document is or a photo is, or to find out if a photo went over to an estimator or did it go over to the... how long has it been sitting in the insurance van and things.

When you're talking about, my previous example, three quarters of a million dollars in accounts receivable sitting out there, but you're too busy to go out

and collect on it, the pain that that must cause, the frustration and the anxiety that that must cause, I can only I can only imagine.

But being able to have a glance and see all of this information, to be able to identify where the bottlenecks are like Monroe was saying and eliminate those, that's something is our company's growing and my team's growing at a rapid pace that I deal with. Let's say, sales falls off a little bit or close rates go down, where in my process did it break down?

And because we have a process that we can go back and say, "Oh, it's step four. Step four is my problem. Let me fix this and then we can get on through the process." Rather than throwing that spaghetti at the wall and trying to see which one of them fits and sticks. And maybe the ones we were doing were the right ones and we're trying to fix the wrong thing.

But being able to have all of the information to communicate, to know that every text message that you are sending in regards to this specific job was in the accountant and timestamped, and you can see it and read it. We had a logo who came on to our system last month. They'd only been with us for about two weeks.

And one of the first jobs they ran through JobNimbus, the homeowner sued them. And so, that was an \$18,000 lawsuit that came across the desk. He was able to pull up the communication stream, because it's all in there and listed. Hand that to his lawyer. Lawyer said these guys have no case. The case never even went past that.

And it was all done, simply because the business owner was able to click on the JobNimbus, see the entire communication string and how it happened, times, dates, etcetera, and hand that off. Now, an \$18,000 lawsuit turned into a few minutes of his time, and now it's done. But the stress of finding when did you make the call, Jim, what did you say, Jim?

All of those types of things where you're going to have to go through, that same thing create a whole another level of stress. Just working smart, you're working smart.

Heidi Ellsworth:

That's right. And you know what? I think that's just a great example of how technology can... I mean, think how much time would go into just even putting something together around that case, around that lawsuit. I mean, hours and hours, days, probably saved, because of having it so well-documented. And data, that data is so critical.

And so, as we're looking at that, too, again, that saved time as we're moving through that. Monroe, maybe you can talk a little bit about just how this is saving time, and I really would love you to also hit on what are the important questions, because as we know from a lot of people who all ready have a CRM out there.

So, what are the things they should be expecting to get out of their CRM that will save time?

Monroe McKay:

Yup, 100%. Yeah. So, like Matt was talking about, I think one of the things that we see with roofers or any kind of contractor, you open your business, you open your doors, and pretty quickly, if you're doing things right, you're going to get busy in a hurry, right? It's going to all be on you.

One of the things Matt was talking about, and it's probably one of the more gratifying things that I see when somebody finally adopts technology and starts using a CRM is, not only does the business flow better, but that stress level goes down, your time and ability to do things outside of work really opens up.

So, having that technology in place, and like I said, putting the right processes in place, it's not only having the technology. But I think along the lines of what you're talking about, Heidi, some of the questions you should ask are not only, okay, great, I've got a system in place or a system that I can use, do I have to adapt all of my current processes to the way you do things or can the system adapt to what I want to do.

And that's a big thing with JobNimbus. We want to fit it to how you use yours, what your systems are. So, if you've got a process that works well, it's just a matter of putting that into a digital format. Let us help you do that, right? We've got experts that do this all the time, that work with a ton of different contractors.

They know best practices and things that have helped people be really successful. So, let them help you set it up and actually get it into a place where it flows the way that it works for you. And then, some of the other questions I think to ask are along the lines of what we have here, so if you're going to really optimize these kinds of systems, does it have automations?

Can I program it to say like what Matt was talking about, send notifications to my customers when we're either beginning the project or in the middle of the project? Do I have the ability to import documents and collect signatures? Can I really dial this in and utilize it in such a way that I'm going to get the best case scenario out of it.

Task lists is another big one, which internally in our company, that's something that helps us all stay on top of things. If I've got Post-it notes and folders and conversations I've had, but I don't have them accessible, it's really easy to lose your way and not stay on top of things that need to happen.

So, I think when you're specifically looking at a system or if you're currently using a system, look into those kinds of things. Like, can I customize it, can I utilize systems that are really going to deliver that efficiency, and ultimately, the bottom line, like what Matt's talking about, because again, time is money. So, the more I can cut out some of those little day to day tasks.

The whole topic we're talking about today is how do we really save that time, right? And what we're finding with most of our contractors, if they're using the system correctly, they can save up to around eight hours per employee per week. And you can imagine what that equates to in terms of bottom line and efficiency and freedom of time, and all those different things.

So, yeah, those are the important things to ask.

Matt Baumgartner:

Yeah. And I'll touch on two of those, Monroe. But I don't think the customization piece, which is one of the things that sets JobNimbus apart should be taken too lightly. If you want to consider my example and I love examples, but if you want to consider my Industrial Revolution example with the Ford, with their production line, imagine trying to build a boat on Ford's truck production line, right?

The tools are there, the ability to do what might be there. But it's going to take a

lot longer and make it a lot harder, because you're trying to fit a round peg into a square hole. But with JobNimbus, you have the ability to customize those different pieces. So, maybe you do roofing, but you also do siding, you'd throw some windows and doors on as well.

You do insurance space roofing jobs, commercial or residential. All of those things have their own workflows. And they may have their own workflows depending on the state, depending on the company, etcetera, right? This is definitely not a one-size-fits-all thing for being able to set up automations or a workflow.

And so, the fact that JobNimbus gives you the ability to create not only one, but multiple, or if you wanted to, more than you probably should, if you're doing things right, but you can do it in the system if you wanted to. Different workflows, different automations, different customized ways of looking at what you're doing is a massive benefit to you.

It is a massive benefit for adoption as well to be able to use your language.

Maybe you call something one thing and another roofing company calls it another thing, and another one calls it another thing, but it's all the same thing. Being able to use your language ups your adoption rate, adoption rate equals usage, usage equals money, and those types of things.

And that's one of the ways that we are able to make it easy to use the system as well, because it's your process, it's your language. Now, of course, we've been doing it so long, we've built so many of these out. We'll also throw in like, "Hey, Jim down the street, we learned something really cool from him, he likes to do it this way."

You know, take it or leave it kind of a thing. But we'll offer those little bits of best practices to be able to really take what you're doing, throw a little nitrous on it, and take it to the next level.

Heidi Ellsworth:

Everything. Well, I like what you're saying, too, about adoption, because we know the culture of a business and bringing technology in, there has to be some fit. And the more familiar it is, the easier it's always for that. And that really leads us to that strong communication, I mean, whether it's with customers or internally with your own employees.

So, Matt, maybe talk a little bit about, I mean, I know you talked again about the phone and how this is just really changing everything. How is that helping with the communications?

Matt Baumgartner:

Oh, I mean, if you're doing insurance-based roofing, for example, you have to have photos because you're not going to get anywhere without photos. I talked to a girl just outside of Denver, who said she was spending more than eight hours a week consolidating photos from a Dropbox, trying to figure out which jobs they went to, putting them into the place, putting the file into the right file, etcetera.

That's nice, but it's old technology, right? With JobNimbus's app, you would be able to launch your job. You're in there working, leaving notes, updating where you're at in the workflow. There's a little button, it clicks, it acts as your camera phone, now you're taking photos on the job, and it's automatically storing them into the system.

You're not chasing down things or texting them, they're there. I could take a photo on a job site three hours from here and you could have it 30 seconds from now. That kind of stuff is really powerful, especially with supplementation and those types of things, to be able to have that. So, JobNimbus has a fantastic photo-capturing app.

But to circle back around to that beehive or that network that we have. If you don't want to use JobNimbus's photo-taking capabilities, let's say you really like company cam and you're into company cam, and it's great, well, we connect directly to company cam. Show up to the work, whatever project you're at, take your photos in company cam, they automatically upload into JobNimbus as well. Now, they're all stored inside that file. You're skipping additional steps that some people are doing this, just taking that additional time. Being able to say, "Hey, Bob, I need you to make sure that you communicate this piece to this person or to this subcontractor or to this vendor. And all of these things need to be in there.

Well, I can jump into the account and within a matter of seconds, see all basically a stamp of the timeline or stamp of the work done and the aspects of the project, the little things, I can see were taken care of. If only externally all of it is just that much easier.

Heidi Ellsworth:

I think you lead us right to that perfect thing to talk about, too, is that there are a lot of companies out there, roofing companies, that already have a software, something that they love, like company cam. And so, the opportunity to integrate and not make people totally change everything, what a bonus. So, Monroe, can you talk a little bit about what to ask about these integrations and APIs?

Monroe McKay:

Yep. So, I think Matt hit on it a little bit in terms of we think of ourselves as the hub, right? We're the area where all the customer information, a lot of the interaction is happening inside of JobNimbus. However, we know that we're not the expert at everything. And we know that there are great systems out there that a lot of our customers are already using, and getting great results with. So, when you go to a job site and you need aerial measurements, you're using EagleView. Well, that integrates directly into JobNimbus. And then, you want to look at creating a quote, SumoQuote is one that's used pretty frequently out there. We integrate directly with them. NaturalFORMS, a whole host of other systems out there integrated directly into JobNimbus.

So again, we don't want to disrupt what you're doing if you've got systems in place that are working really well. We don't want to tell you, hey, drop that, and you're going to have to start using something totally new and learn a new system and all that kind of stuff. Instead, we know that those companies are really good at what they do. They're some of the best in the industry.

So, continue using that, but make sure that that's hooked into your system. Otherwise, you create multiple steps that you'll have to take. So, that's something that's really important to ask is when you're looking at a CRM, what kind of integrations does it have? And in our case, we've got a lot of them. I can't list them all out here.

Matt might know them off the top of his head, but there's too many for me to

rattle off. So, yeah, there are a ton of them. And we like to think that we're hooked in with some of the best in the industry. And that's the feedback that we get really frequently. So, yeah, we want to make sure that our system is speaking to those other systems.

So, if you're going to create something or take photos in company cam like Matt's talking about, great, let's have those photos go directly into JobNimbus, where you can access them at any given time. And the same thing goes with Beacon, if you're using Beacon, let us help you actually create the order and send it directly to Beacon from our system.

So, I like that last slide that talked about the mobile app, because so much of what we're doing, specifically if you're a contractor, is done out of the office, it's on the job site, right? So, if you can pull up your JobNimbus account and do most of what you have to do right there, including the measurements and the quotes and all that different stuff, you're going to be so much more efficient. And it's going to create that experience Matt was talking about for your customer. Where it's like, "Great, I show up and I can take care of virtually everything right here on site." And I don't have to go back to my office and give the customer time to think like, "Ooh, do I really want to? Is this the right experience?"

Those kinds of things, right, I can just knock it all right out, right there on the spot.

Heidi Ellsworth:

And the thing that is so cool about that, too. And that Matt, the thing that's so cool about that, too, is even in this time of social distance, where you're not going into the home as much or into the business, maybe a little bit for that, but you're trying to keep that big social distance. You also now have an opportunity to say, check that out, and you can stand back and send it to them and they have all that information right there. Go ahead, Matt.

Monroe McKay:

Absolutely.

Matt Baumgartner:

I was just going to say, I'm not a programmer by any means. In fact, I don't understand any of the language sometimes that they talk about, but I do understand the importance of integration. I think we all understand the importance of playing nice in the sandbox. JobNimbus is built by coders. Our founders are programmers who got involved in the roofing industry and saw a niche. Well, because of the way we've written our coding and because of the way we've done these things, we've been able to integrate with all of these other great companies to pull them in. And that little term, API, that's basically, the way I use it to describe it is it's a tunnel that we built into JobNimbus. We will share that tunnel with our end users. And they would be able to embed that tunnel into their website, for example. Now, again, I don't understand coding so I'm not sure how it all works. But you take your coder, the guy that built your website, and say, "Hey, I want you to integrate this API." So, that way, when somebody goes onto your website, fills out a form that they want you to come out and check out their house, it automatically creates a customer in JobNimbus, you're automatically sending out all of those welcome emails, and all that process is automatically happening. So, you can integrate

not only internally with your own stuff, but you can also then use any of our partners.

We partner with the best. We're the fastest and growing and one of the largest CRMs in the scope. So, not only are we partnering with the best, but we're continuing to partner with the best. And a lot of those guys are seeking us out and our integrations are only getting stronger and stronger.

Heidi Ellsworth:

I love this next conversation in that so often people just say, "Yeah, you're going to save time, you're going to do this, this thing." But you all have put together a case study showing you can save eight hours per week per employee. In fact, for everyone out there, if you go to the handouts, you can download this.

It's also on Roofers Coffee Shop, obviously in the directory for JobNimbus and across the site. But I think this is pretty dang cool. Matt, can you talk about this case study?

Matt Baumgartner:

Yeah. So, when you're trying to get a lot of this data out there, because the roofing industry is so broad, and the barriers to entry are relatively low, so you got a lot of people that are fly-by-night, in and out, etcetera, etcetera, it makes it hard to get industry wide data.

So, rather than doing that, we said, "Hey, let's go out to people who are actually using the technology and find out what the actual impact is." So, this is what we got back. Eight hours per week per employee. Now, of course, that's going to skew depending on what your role is.

But I can only imagine the sales guy that came to my house, how much time he would have spent or saved. Let alone the office girl who I mentioned earlier that was consolidating photos from Dropbox to the next one. Or as a business owner, simply either not having to drive out to do an inspection or being able to quickly look at data and information of who's profitable and who's not, and all that kind of stuff.

Eight hours per week per employee seems like a pretty big number. And when I first saw it, I was like, "Wow." And then, you really start breaking it down. And you're like, "Oh, man, I bet I would save more time than eight hours simply because of all the things I can now erase from my job."

Heidi Ellsworth:

Yeah. I think really taking the time to look through all this, to understand it, and to put those data points and those numbers to it, can really start... it won't be long before every company sees what this can do. So, let's talk about how to incorporate. Early on, we had a gentleman asking for a demo. So, I think you're going to have a couple of demos out there.

And so, how do contractors incorporate JobNimbus and give them the... how do they go from here, Matt?

Matt Baumgartner:

Well, the easiest part or the best thing about this is there's not a lot things that they would have to do or effort from the owner or the roofing company, or the end user. Because call us, we'll walk you through a demo. We have a 14-day free trial. That's fully turned on, you can integrate, do whatever you want with it.

But really, my team would walk you through a software demo typically about 45 minutes or so. We'll cover the software, hit on your pain points and your

specifics, cover pricing and how that would work. Because we're customizable software, we also can help build packages that make the most sense for you. But the best part about it is once you're past that stage, we've got a really comprehensive program to get you through from the build out of building out the bones of JobNimbus, doing all of those customizations so that you don't have to sit and spend your time doing that to the training and getting you all the way through that training process so that you're comfortable using the software and now the adoption rate again goes up.

And then, once that's done, a lot of the other integrations are done for you. It's done behind the scenes. It's a couple of flips or switches, maybe grab a username, put it into the system and then we're off and running. Beacon, for example, being a great integrative partner of ours. You can integrate your Beacon, your templates, all of the things you're doing in Beacon Pro+ in about two minutes, Monroe?

Monroe McKay:

Yeah, yeah, super quick. That's what I was going to add, is just let us help you. I think, again, getting over that hump of like, "Oh, man, I'm jumping into something that seems intimidating." Let us help you build that out. I mean, the whole point is to make this simple and easy and efficient. So, we don't want people to buy this and then be like, "Oh, man, what do I do from here?" So, we assign people directly to help you really create the right processes, and dial it in, so that it is going to be a time saver, and not at a time suck, by any means. So, you know-

Matt Baumgartner:

I was going to say, one of the other fun things is if you don't have a process or you're not quite sure what the best process is, we've got ways to help you do that as well.

Monroe McKay:

Absolutely.

Matt Baumgartner:

So, through that piece of it, there's coaching and best practices and business solutions, and continued training, and all of those kinds of things. Simple things like, what's your return on spend on your marketing? What's your KPIs or your key performance indicators? What are your lagging indicators? What's your overhead? What are all these things?

If you wanted to step back and say, "All right, what do businesses care about? Not just roofing companies, but let's start talking about all the real things that take me from being a roofing company owner to being midsize business owner who happens to run roofing?" We'll help you with that, too.

So, not only is it just software-specific, if you want to have the business specifics, and some of that other stuff, we've got coaches and mentors for that, too.

Heidi Ellsworth:

And you also have a lot of great contractors that know each other and work through that, who have met through your events and different things. So, it's like a network of its own. It's pretty awesome. Well, we had a couple of questions early on. And I think this is going to be good news for everybody. But I apologize if anybody was bit... we had a few people who are looking for a demo

during this.

So, I think we'll be able to provide that afterwards. So, we're going to run a poll to see right now on who might be interested, just because of the people who have already been asking about demos. So, we'll launch that poll. And while we're doing that, because I know that we actually had a couple people who wanted more information and wanting to get in touch with all of you.

So, if you can answer that poll, we'll do that for just a second. And then, we're going to go into questions. We have just a little bit of time left in our hour. But Matt and Monroe, wow, this is the right time. We were just talking about how weather is on its way, things are happening. Is this the time right now to be really getting with you before the heat of the season?

Matt Baumgartner:

100%. And following some of the forecasting and seeing some of the cool stuff that's coming out of that, it's shaping up to be a great year for roofing, and having processes and procedures and all of that kind of stuff put in place, as you're at least starting to get going. But before the real busy season and getting that used to it, now is the time to get it done.

We can get you, guys, built out from whether you need just an out-of-the-box solution, where you're looking at like, "Hey, I don't really have a workflow or build out." I can get you out an out-of-the-box solution or a custom solution.

Have you through on-boarding and training.

And depending on, again, on how in-depth we go, within a few weeks, adoption and training continue through there. And we call it 30 days, and you're fully optimized in the system. Now is the time, get in and get it done, get it ready to go and start yourself off on the right foot.

Heidi Ellsworth:

Perfect, perfect. Well, we are going to now move to our questions. And we had a couple of them come in at different times. So, one of the questions that came in was, you talk a lot about the customization and being able to put that together. How do you determine successful on-boarding for the roofing contractors?

Monroe McKay:

Yeah. I can jump in real quick, Matt. I think there's a couple things. Again, we want to make sure that this fits what your workflow is, or at least what's going to get you the best results, right? So, I would say, taking the time to actually help us identify those kinds of things and put those workflows in place for you. One of the other things that we want to do is try to make sure that we're pretty efficient in terms of getting this up and going. I think a lot of people are worried about, man, how much time is that really going to take to get these workflows and all that stuff established.

So, our team is really focused on let us help you do that and as quick and efficient way as we possibly can. So, I would say that we judge success by helping us match everything up to what you really want to accomplish. And try to do that in an efficient, good way.

I think beyond that, though, we find so many of our contractors who come back six months to a year later and say, Man, I went from this much revenue to this much revenue. And honestly, I don't think I could have done that without having this technology in place. Because scaling and growth, it's hard to accomplish

unless you've got some systems in place.

It's hard to continue to add those employees and add people to the process, and not have that slow everything down or create some complexities. So, that's something we love hearing is like, "Man, I opened my doors and I went from 500K to two million in a year." Right? That's a huge success story to us. And we hear that all the time.

We hear even bigger numbers than that. But I think that's how we look at helping to find success for our customers.

Heidi Ellsworth:

What I love about that answer, too, is it's about listening to the customer. What do they need? What defines on-boarding for them? So, that is so cool. We had another question come in earlier on and I want to know, I'm just going to answer this one real quick, but it wants to know if they can get a copy of the recording, because their boss couldn't attend.

So, thank you very much for being on here. And yes, you can. It will all be available online at on Roofers Coffee Shop under RLW, the Read, Listen, Watch section. And also, like we said, we're also going to be following up for any of those who want a demo. So, that would be also a great chance if you want to incorporate that into the whole company.

And then, we also had a question, again, about wanting to see the actual functionality. So, that was part of the really looking for that. So then, the last question we have before we probably should put in this is, what size of company do you need to be to get started with JobNimbus or technology overall?

Matt Baumgartner:

That's a great question. And I would say, depending on who you listen to. It's one of the very first things that you should do as a small company. Get started off on the right foot with data capture right from the beginning. You know, their ROI on it is near immediate from a little company all the way up through the big companies.

We're often talking to people who are a single or two-user, maybe just getting started, a husband and wife team sometimes, all the way up to multiple hundreds of users who are coming in, who have 15 wings to their business that are doing all kinds of different things. We can help with all of that.

One other piece that I also wanted to touch on as part of our on-boarding, if you are at another CRM and you are doing things in another place, we also have connections that we would be able to help you get that data from where it's at now over to JobNimbus to help smooth that pain of switching CRMs as well. So, a little bit more customization there as far as ramp up and getting going.

Heidi Ellsworth:

Yeah. You know it's always scary. My data, what's going to happen if I make changes? So, I think that's a really good, really great way to end. It's for people to know that they have a way, have solutions, and your data is going to be protected if it's already out there.

So, gentlemen, Matt and Monroe, thank you so much for joining us today. For all your wisdom, for your information, we appreciate it so much.

Matt Baumgartner:

No, it's pleasure to be here. We are more than happy to be on and support and do what we can.

Monroe McKay:

Yeah. Thanks a lot, Heidi. Appreciate it. Thanks for everybody who listened in.

Heidi Ellsworth:

Thank you. And yes, as Monroe said, thank you, all, for being here today. Thank you for listening. Thank you for your questions and your interest. And again, this is going to be on the Read, Listen, Watch portion of rooferscoffeeshop.com. It should be there later today in video and podcast, and by tomorrow, with a full transcript.

So, be sure to listen to it along with all of our Read, Listen, Watch webinars. There's so much good information, great training that is out there that can be shared anytime, whenever it's best for you to use it. And I also would like to encourage you to listen to our podcasts under Roofing Road Trips. We have all kinds of information out there, too.

So, anything that you might be looking for, for your business most likely will be there. Two weeks from now, on March 17th, please join us for Greg Hayne. Greg Hayne is well known throughout the industry for his service and maintenance consultations and what he's doing out there to help businesses grow. We are going to have a conversation that I'm really looking forward to. So, join us two weeks from now. Thank you, again, and have a great day.



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