



2020 Top 20 RCS Influencer Insights



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The importance of Roofing Influencers cannot be overstated. These leaders continue to provide wisdom that helps roofing contractors of all types along with the roofing industry overall. RoofersCoffeeShop asks the question and these roofing professionals deliver.

With our RCS Influencers opinions, tips or advice a reader gets a feeling for all sides of a topic. A beneficial twist is including companies that are not only roofing contractors but also companies that service the contractors. All will have an interesting perspective based on their interactions with the roofing industry.

We would like to share the top 20 of 2020 for your education and enjoyment. RoofersCoffeeShop is honored to share their expertise through articles, podcasts and video. They are incredibly generous in sharing their wisdom throughout the year with the industry they love through regular posts on our website and social media channels.

We hope you enjoy reading the amazing content from this group.

RoofersCoffeeShop team



Online Ordering Improves Efficiency

By Rudy Gutierrez

RCS Influencer Rudy Gutierrez says that his company is transitioning into online ordering.

For Shell Roofing Solutions, we see a benefit to using an online ordering process; however, our team has not yet made the complete change to our internal process to be able to fully implement online ordering.

I think many companies might say they are hesitant to make a change to their successful process of ordering supplies. Many people prefer having face-to-face and/or person-to-person interaction for ordering their supplies and materials. However, Shell Roofing Solutions is moving in the direction of doing business online for equipment and materials orders. During this pandemic, online ordering for our personal and essential items was very effective.

We are seeing a shift in the mindset of both our team members and our customers. With social distancing practices in place, we need to take advantage of the tools that we have to conduct business online, with limited in-person interaction. I think now we are more open to doing business online than ever.

In addition to the health and safety benefits, online ordering can also deliver efficiencies to our business. As we make the shift to more online ordering, we are seeing a savings in time and labor involved and we have better insight into our expenses because of the reporting and accuracy of the online process.

Many suppliers have e-commerce platforms set up that are easy to access from a computer or mobile device and are not difficult to use. Those who don't offer online ordering are working to make that change to be able to accommodate their customers.

Your team may not be fully onboard with the idea of shifting to online ordering as it changes routines and what they are used to. But given time and a little patience, eventually they will wonder why they didn't make this change earlier.



Online Ordering is Already Here

By Heidi J. Ellsworth

RCS Influencer Heidi J. Ellsworth says that online ordering, delivery and payments are here to stay.

For business, it also made the final move to the cloud a lot faster. Roofing distributors and manufacturers stepped up quickly to provide the tools for remote operations for the back office, sales and finance. One of the biggest pushes has been online ordering, delivery tracking and online bill pay. If your company has not made this switch yet, it is time.

Contractors can now connect with distribution and manufacturing in new and productive ways. By incorporating online ordering, sales, estimating, purchasing and operations can effectively communicate with their distributor and each other keeping jobs productive and on time. It enables roofing teams to order all their building material supplies online and the technology for office staff to work at home while effectively managing jobs and accounts safely and remotely, keeping the business of roofing running efficiently.

And just like Amazon and Door Dash, the technology to track the roofing orders has taken a leading role. Crews are able to find out where their materials are in the delivery process. Office personnel can be sure that they are getting the needed materials to the jobsite on time. And it is a living documentation of what was delivered and when. It is that type of Uber type technology that is now defining material delivery in the roofing industry. All team members can stay on track to finish projects, no matter where they are working.

A final piece of this online ordering puzzle is then paying bills and that has been made simpler too. Online bill pay, helps contractors to schedule future payments, access invoices and payment history, download billing information to business accounting software, and email notifications of new invoices and statements. With the number of employees who are working from home and most likely will continue working from home, this is more important than ever.

By implementing these services and processes, the finance department can focus on customers, collections and improved profitability. In fact, as you are paying online with your roofing distributor, you may want to consider offering a similar service to your customers. This is an opportunity to truly automate not only accounts payable but also accounts receivable. It is worth researching and asking your vendors about potential help in setting it up.



Roofs Don't Stop Leaking During a Pandemic

By Mike Pickel

RCS Influencer Mike Pickel says that communicating with your customers during coronavirus is critical. Roofs don't stop leaking during a pandemic.

The new normal is what many media outlets are calling it. Work from home, avoid crowds, sporting events canceled, conferences rescheduling. We've never experienced anything like this on a national level.

While this might be our new normal, Mother Nature doesn't know what's going on. There will still be bad weather, storms, hail and more. Spring is here and that means storm season. Roofs will continue to be damaged and in need of repair or replacement. That is why it's more important than ever that you communicate with your customers now so they can be assured that you are still there for them.

Develop a plan for your business to keep both your employees and your customers safe while this pandemic endures. Share that plan with your customers and potential customers. Put the message on social media, send emails to your database, put a message on your website.

In this Forbes article, there are several examples of communications being sent out from companies. You've probably seen some in your inbox. They explain to customers that the company is taking precautions to keep everyone safe and they detail the steps they are taking.

So, what can a roofing contractor say to customers? You might start with 'We are still here for you!' At Texas Traditions Roofing, we did exactly that. We let our customers know that we are still available for emergency leak response, for appointments and roof replacements. With technology, we can even do a virtual first appointment.

We also shared that we would not be shaking anyone's hands and our team members were under strict guidance to wash their hands before and after every interaction. If a customer is not comfortable with a team member entering their home, we're happy to meet outside – with a six-foot distance between us.



No One is Going to SAVE You; You Have to Save Yourself

By Wendy Marvin

RCS Influencer Wendy Marvin shares some solid advice on just how to save your business.

Unprecedented times. Unprecedented situations. Hell, there are days I feel like we've entered the Twilight Zone and the darn story isn't ending.

I know my title is harsh but it's true. Everyone out there is TOO BUSY to make a phone call directly to you to see if you're ok. You have to find a way to be an advocate of your business. You're going to have to save yourself.

After you're done reeling from the changes, and making sure your family is situated, are you ready to work? We've been given a chance to do the work that will take you to the other side and allow you to emerge* after the pandemic is over.

*I wanted to add something after that word "emerge," but I just didn't have an answer. The truth is I hope you emerge healthy. I hope you emerge stronger. Honestly, I just hope most of us can survive this. I'm sending you ALL, strength, perseverance, GRIT, and respect. We certainly deserve all of this for running a company right now.

Ok – down to business. All of this is a moving target and there are NO EASY answers. The best thing I can give you is to boil down what I've experienced in the past few weeks and try to make this categorically understandable. You're still going to have to do a lot of work.

Here are my top 6 recommendations:

Establish an Advisory team

YOU are not the best source of information about this moving train. Surround yourself with experts in the field who are doing what THEY do best. Allow yourself to be guided. Make sure they are staying up on the daily changes. You need a Legal advisor. You need a Human Resources advisor. You need a Payroll advisor. You need a State advisor. You need a Financial advisor. In my opinion, this is the minimum team you need, and some people can fill multiple roles for you. Some organizations can provide this information for you as well.

Do your best to keep your company in compliance

There are MANY levels of compliance affecting us right now. Federal, State, City, County. This is a moving target, depending on where you live. You need to find out how to know who's pushing the hardest in your area. Is the City enforcing but the State doesn't care? Is the County providing all of your guidance or is it State?

Look to your local trade organizations for guidance in your industry. Look around if you haven't joined. I've found that a few organizations have bubbled up as more adept at informing me of the changes than others. You need to plug into someone who is updating information DAILY. Some examples are the Building Industry Association, the Roofing Contractors Association of Washington (my state's association) and there are many others. Pay attention to industry affiliates like Professional Roofing, RoofersCoffeeShop® or manufacturers like GAF – they're working hard to help too.

Look to your national organizations as well, although membership there can be more expensive, they're REALLY worth it now. Our National Roofing Contractors Association has been invaluable for our state battle with Washington – one of only 2 states that didn't list construction as an essential business.

Protect your workers in the field. Make sure you're supplying them with paperwork necessary to document them being in a truck driving around. What do they need? I gave my guys a copy of the Governor's proclamation about construction. I asked for a compliance letter from my Attorney. Trent Cotney from Cotney Law is one of THE BEST Attorneys I've ever come across. He has been a HUGE part of my advisory team. Make sure you update them as more information becomes available.

Supply your employees with proper information. Remember there is NO common sense right now. Tell them how to know what COVID-19 looks like and what to do (find an organization who issued guidance) when they or a loved one experiences symptoms. Tell them how to sterilize a truck or tool that someone else will need. Give people in your organization SPECIFIC guidance on how to handle this craziness to the best of your ability. Again, use the organizations for help, use the SBA for help, look outside your company or even your industry. Companies have a lot of similar needs for guidance right now.

Know your Human Resources requirements and new benefit changes. Understand how to lay someone off, and what's required to let someone go. Again, plug in where you can if this isn't your area of expertise.

Know your financials

This is a time for understanding where your money comes from and where it goes when it leaves. Not your forte? HIRE a professional. Can't afford it? You can't afford not to at this point.

Who HAS to be paid and who can wait (find out what's happening nationally with loan or lease payment requirements)? What services are fluff and can be canceled saving you valuable money. How much PROFIT (sales – expense = profit) you make on a job. MORE work isn't necessarily better. After all expenses are paid, how much money is in your pocket after each job?

Don't stop selling

One of the first things people do when things get tight is they stop selling. You HAVE to keep money coming in the doors. Evaluation of your current system, however, is mandatory. Just because you've always done something one way, doesn't mean it has to continue in this current environment. BE CREATIVE. How can you reach people? What do they care about? Why do they care? This is a GREAT time to become a student of your customer finding out who they are, why they buy, and what you offer to them.

NOW is the time to connect with your customers as well. After you know them, reach out with relevant information for them. Give them a reason to remember you after this is over.

Modify your contracts

Do your contracts protect you now that the world has gone crazy? Do you take down payments? Do you have language that says what happens if you're ordered not to work? Many of us didn't but going forward you should. Consult with legal advisors on this. Communicate with your customers on the NECESSARY changes. Learn what has gone wrong for others and do what you can to protect you, your employees and your company.

Take care of yourself

Remember, an empty vessel can't fill anything. YOU are the leader of a company and most likely you have people depending on you. Take time for yourself when you can. Eat healthy. Drink lots of water. Give yourself a tool (your body) that you can rely on during these stressful times. REST when you need to. Everyone processes stress and change differently. Take moments of down time to recharge.

There's a whole community out there just wanting to connect. Don't be an island during this difficult time. You're not "just" a roofing company, you're a business owner. Engage with your local Chamber chapters. Join a group on Facebook or LinkedIn. Most businesses are experiencing the same craziness you are, find someone you can learn from. You don't have to reinvent the wheel every time.

I hope this has helped a little. I'll see you on the other side.

Thanks for taking the time to read this.

Sending you health from afar.

Wendy



Develop a COVID-19 Strategy for Your Business

By Rudy Gutierrez

RCS Influencer Rudy Gutierrez shares his company strategy for best practices and conducting business safely during the Coronavirus pandemic.

My dear friends in the roofing industry, we are facing unprecedented challenges with the Coronavirus worldwide. Nationally the situation is fluid and changes minute by minute.

We must be practical, remain informed and implement measures specific to your local situation. At Shell Roofing Solutions Group, we have asked the NRCA for guidance with respect to the COVID-19 situation. The NRCA sent out OSHA safety guidelines that were very specific to personal hygiene and measures at the office and or a roofing project. Based on the information provided by NRCA and the U.S. Federal Government, we developed a strategy to the best of our ability.

We met with our team and informed everyone of the fluid situation and asked that they consider the wellbeing of their families as well as their team members. We implemented a plan; information flow through text, cleaned out work environments, provided personal hygiene products for the field and asked our team to inform us when they attend a large gathering or when someone at home is ill. This will allow us to react to a health situation and make necessary adjustments in our company.

Shell Roofing plan:

Exercise personal hygiene

Keep work areas clean

Employed a company do disinfect all or sales and services trucks

Cancelled all events and networking meetings

Limit visitors to the office

Reduce the number of workdays

Work from home if possible

On a roofing project, all measures apply

We asked our team members to scale back going out to large gatherings

All team members are asked to let us know when they have been around large crowds (this information is voluntary)

The health and welfare of our team are of utmost importance to us. We continue to monitor updates from our government. We will make decisions based on their guidance and as the situation unfolds.

For now, we remain hopeful that our leaders are doing everything possible to deal with the spread of the virus. We are being diligent about do our part.

I hope this information is useful to all.

En Español:

Mis estimados amigos de la industria de techos, nos enfrentamos a desafíos serios con el Coronavirus en todo el mundo. A nivel nacional, la situación es fluida y cambia minuto a minuto.

Debemos ser prácticos, permanecer informados e implementar medidas específicas para su situación local. En Shell Roofing Solutions Group, hemos pedido a NRCA orientación con respecto a la situación de COVID19. NRCA envió directrices de seguridad de OSHA que eran muy específicas para la higiene personal y las medidas en la oficina y o un proyecto de techo. Basándonos en la información proporcionada por NRCA y el Gobierno Federal de los Estados Unidos, desarrollamos una estrategia lo mejor que podemos.

Nos reunimos con nuestro equipo e informamos a todos de la situación fluida y les pedimos que consideraran el bienestar de sus familias, así como de los miembros de su equipo. Implementamos un plan; información fluye a través del texto, limpiamos en entornos de trabajo, proporcionamos productos de higiene personal para el campo y pedimos a nuestro equipo que nos informen cuando asisten a una gran reunión o cuando alguien en casa está enfermo. Esto nos permitirá reaccionar a una situación de salud y realizar los ajustes necesarios en nuestra empresa.

Plano de Shell Roofing Solutions Group:

Ejercer la higiene personal

Mantener limpias las áreas de trabajo

Empleado de una empresa sí desinfectar todos o camiones de ventas y servicios

Cancelado todos los eventos y reuniones de networking

Limitar los visitantes a la oficina

Reducir el número de días de trabajo

Trabajar desde casa si es posible

En un proyecto de techado, todas las medidas se aplican

Pedimos a los miembros de nuestro equipo que retrocedieran yendo a grandes reuniones

A todos los miembros del equipo se les pide que nos avisan cuando han estado alrededor de grandes multitudes (esta información es voluntaria)

La salud y el bienestar son de suma importancia para nosotros. Seguimos monitoreando las actualizaciones de nuestro gobierno. Tomaremos decisiones basadas en su orientación y a medida que se desarrolle la situación.

Por ahora, mantenemos la esperanza de que nuestros líderes estén haciendo todo lo posible para hacer frente a la propagación del virus. Estamos siendo diligentes acerca de hacer nuestra parte.

Espero que esta información sea útil para todos.



Help Customers Make the Best Decisions to Protect Their Assets in a Pandemic

By Charles Antis

RCS Influencer Charles Antis talks with Susan DeGrassi about helping owners make decisions quickly and swiftly.

[Editor's note: Watch Charles and Susan talk about helping their customers make the decision to proactively protect their assets during this pandemic or scroll down to read the transcript.]

<https://youtu.be/pgXWse2BWaA>

Charles Antis: As you know, effectively, we have like 30 office stations working remotely from home. And we're doing a great job. In fact, everybody's fulfilling their job at full capacity. Is that right?

Susan DeGrassi: That is right.

Charles Antis: We are effectively and safely keeping folks dry in the moment when it's raining. And the technology that we've been investing in for 12 years is really starting to make sense right now. What's the most important thing we can ask for all of our partners, our stakeholders, and clients to do right now in the moment?

Susan DeGrassi: Well, as you know, I was an HOA manager for almost 30 years, and I feel their pain. It's got to be chaos trying to adapt, working remotely, getting boards to meet remotely and comply with changing laws surrounding that. But probably the most critical thing to do right now is, when they are meeting, to make decisions quickly and swiftly on maintaining their property.

And here's the reason for that. In the next two to three weeks, we are told that in our state this virus is going to peak. Well, if that's true and people are pulled out of their jobs, board members can no longer make quorum because half of the board is sick, or the manager is sick and half their staff is sick, to take advantage when you can, of working proactively to make decisions that protect your assets, in the long run that's going to be the most vital decision, in my opinion, that you could be making.

Charles Antis: And that's our job.

Susan DeGrassi: That is our job.

Charles Antis: To protect these properties.

Susan DeGrassi: That is, yes. [crosstalk 00:01:40] And that's why central services is defined the way it is in our country, is so that we don't have this collapse throughout our infrastructure.

Charles Antis: So, our ask to our stakeholders, and particularly to our management partners, is to help us do whatever it takes to keep our communities safe and dry.

Susan DeGrassi: I think that's what it is.

Charles Antis: Okay. We're going to end right there. Thank you.



Important Coronavirus Credit Information

By Thea Dudley

RCS Influencer Thea Dudley says that there are plenty of COVID-19 Resources to help contractors.

I recently had the opportunity to share financial expertise during RoofersCoffeeShop's newest weekly virtual initiative, "Coffee Conversations." It was a nice way for me to be able to answer questions and give advice about collections, account receivables and managing cashflow during this economic crisis.

Be sure to listen to the full Coffee Conversation here. During the conversation, I was able to share and talk about the following resources for contractors:

Federal Deposit Insurance Corporation (FDIC) Website

Great source of information on what is going in the banking industry, information on what FDIC is recommending to the banking industry and the latest updates.

Small Business Association (SBA) Website

One of the best sources for information on small business lending and resources– they currently have a huge yellow banner across the top of the site COVID19 Relief options and additional resources including guidance and loan resources.

Federal Trade Commission (FTC) Website

Information on where businesses can turn for accurate information about financial relief, latest scammer information and updates for both consumers and businesses.

NCS Credit Website

Nationwide (and Canada) provider for mechanics lien and bond service, UCC's, collections and credit and collections education. Currently providing COVID19 State and County updates for the courts in regards to document recording and jurisdictional updates. COVID19 update site if free of charge.

Dun & Bradstreet (DNB) Website

Business credit reporting. They are currently offering a one-time free portfolio "Coronavirus Customer Health Scan" to help you determine what customers are most at risk. Email requests directly to Susan Costello at her email: CostelloSu@DNB.com or call 513-830-9961 Susan on her direct line.

American Collectors Association (ACA) Website

Organization for professional collectors. They have a COVID-19 section with information on the changing data for collection agencies and how they are proceeding during this time period. Great resource for guidance. Usually requires membership but you can create a guest sign in for information.

Fund My Deductible (FMD) website

Financing solution for roofing contractors to offer their customers to help bridge the gap between insurance payout and deductible. Also has options for accounts receivable solutions.

These resources give a quick start for some of the options we discussed during our Coffee Conversations. Please feel free to reach out to me directly for any additional assistance or questions! Stay healthy and safe.

Listen to the Coffee Conversations here.



This is a Time of Opportunity to Strengthen Your Business

By Mandy McIntyre

RCS Influencer Mandy McIntyre says that businesses have plenty to learn from this time of “new normal.”

The new normal. That’s what I keep hearing. Phrases such as “flatten the curve” and “social distancing” are, indeed, our new normal. Working from home if possible, keeping a 6’ distance if and when you are out is the new normal. Honoring our front-line nurses, doctors and other medical workers is the new normal. Respecting our grocery workers and truck drivers who are tirelessly working to keep us all fed is the new normal. Washing your hands, keeping sanitizer with you at all times... this is our new normal.

As a business, there is plenty to learn from this time of “new normal.” We can learn to be more efficient, innovative, resourceful, and flexible. Now is the time to band together and achieve a common goal. We don’t have a choice - we are being forced to review what we’ve neglected to do until this pandemic began... and it’s a huge wake up call. But you know what? We will emerge from this better, stronger, and wiser than before.

At 1st Choice Roofing we are capitalizing on this time to analyze our efficiency, both in the field and office, as we adjust to our new normal. We are finding loopholes we didn’t realize were there before. This is an opportunity to really examine your business as a whole and discover new strategies to succeed today that will carry over to tomorrow. We are seeing our current systems and protocols evolving for the better, we are seeing what transitioned seamlessly and what needed some tweaking during this new normal.

Have you been waiting to pull the trigger on that new software? What do you have as paper files that could be electronic? How can you streamline communication for field, office and customers? How can you better manage cash flow? This is a time of opportunity for your new normal—we have to see it as that. It is also a time of potential new labor – the trades are, in essence, recession proof and we are continuing to hire with virtual interviews. Many Americans are out of work right now, and unfortunately many more may follow.

If there was ever a time to strengthen your business, it’s now. Seize your opportunities, learn and grow from this temporary setback, and define your new normal to move forward.



Coming Together as a United Front Elevates the Roofing Industry

By Mandy McIntyre

RCS Influencer Mandy McIntyre talks to 1st Choice Roofing owner about what people can expect when they attend Roofing Day in D.C.

As Roofing Day in DC approaches next month, many contractors across the county might be asking themselves the same questions: What is this exactly? Why should I go? What can I expect? I sat with Ian Fess, owner of 1st Choice Roofing in Cleveland, Ohio to discuss his experience at Roofing Day in DC to offer some insight to anyone in the industry wondering what this day is all about.

From a contractor’s perspective, describe your experience going to Roofing Day in DC?

“I thought it was pretty awesome to meet up with a bunch of different people from all over the roofing industry. I met fellow contractors along with manufacturers and company representatives and also a lot of people from Ohio. In the state of Ohio, we have a lot of manufacturing for roofing, so we were able to all get together and demonstrate a united front as an industry regardless of where we come from or in what capacity our role is in roofing.”

What was the biggest take away from your experience?

“The fact that we were able to literally stand and get in front of the representatives and senators of our country. We had an opportunity to see how our government actually works. It showed us that if we actually reach out and talk to our representatives maybe we can get something done.”

As a contractor, why do you feel it’s important to be involved with Roofing Day in DC?

“I believe it’s important to be involved in the roofing industry period and what it stands for. Our industry at times doesn't have the best image, and I think anything that we can do as roofers to promote a good image, especially to the people who are putting together the laws of this country is a good thing. By coming together as a united front, we are really able to elevate our reputation as an industry and let the country know how vital our work is. It goes a long way in furthering our potential to attract future workers and what we’re able to do as an industry.”



A Business Plan Helps Prepare for the Future

By Trent Cotney

RCS Influencer Trent Cotney says that business plans provide a vision for where you will be in five, 10 or 15 years from now.

Nearly every business owner can speak of their lofty goals, but not every business owner can put a plan into action to achieve these goals. For a business to reach a successful goal, you must first create a business plan and reference the plan throughout. The business plan becomes a living document that you review and make changes to adapt your business as needed. Business plans are critical to the future success of the company. Not only does it communicate the company's vision to others, but it also includes measurable objectives for the short and long term.

Our business plan has been essential to navigating growth. With so many variables factored into running a business, new ideas and solutions can easily get lost down the pipeline. Having a business plan in place allows for all of these variables to land in one cohesive place. The plan provides a vision for where we'll be in five, ten, and even 20 years. The plan also serves as an outline for shareholders and management to plan for future budgeting, hiring needs, and marketing campaigns, and client service development strategies.

Planning for the future is always important, but you are the only one who can make sure that the future of your company goes in a positive direction. By reviewing your business plan annually and re-evaluating the outcomes of the previous year's goals and strategies, you'll be able to get a bigger picture of overall strengths, weaknesses, and how to adequately prepare for what's to come.

Trent Cotney is the founder of Cotney Construction Law, a law firm that specializes in roofing and construction law. See his full bio [here](#).

Disclaimer: The information contained in this article is for general educational information only. This information does not constitute legal advice, is not intended to constitute legal advice, nor should it be relied upon as legal advice for your specific factual pattern or situation.



Roof Inspections Build Relationships and Lead to Reroofs

By Marty Stout

RCS Influencer Marty Stout says that regular roof inspections are one of the most important services to do for your customers.

We do fall, winter, spring and summer inspections. Roof inspections are one of the most important regular services any home or building owner can do.

In some markets fall inspections are important because the summer heat has done its damage and a quick inspection, a quick clean up and some minor repair work can save a lot of damage to the house or building and extend the serviceable life of the roof for many years.

Fall is a good time when there are trees close to the roof and leaves and debris have built up on the roof and can block the free flow of water into drains or rain gutters. In the cold areas it's good to get this done before snow and ice start to accumulate.

If the property is in a climate that gets a lot of late summer rain and not much winter rain, e.g. Phoenix, then fall is not the best time to inspect the roof. A spring or early summer inspection would be a much better option.

We believe that it's a good idea to implement a program of roof inspections at regular intervals, depending on a variety of factors: location of the property, climate, elevation, trees, traffic, dust, smog, rain, hail, type of roof structure, type of roof material, age of the roof and more. Depending on these factors, it might be a good idea to inspect more often than every fall and it might not be required except for every five years or so.

Inspections are good for your business and good for your customers. They provide a regular interaction between roofer and owner; this keeps you in front of them, so they don't forget who you and your company are. They provide regular chargeable service work, albeit not normally are these large transactions they are regular and much easier to schedule than repair work in the middle of a major storm.

These relationships built over time will bring reroofs when they are needed. They also bring referrals and loads of good will.



Every Business Plan Must Address Funding

By Thea Dudley

RCS Influencer Thea Dudley says that business plans are pure fantasy unless you flesh them out with specifics and follow them.

Business plans are the same as a roadmap on a trip. It's great to know where you want to end up, but what is your plan on how you get there? What is the timing?

One important part of the business plan that often gets overlooked or just plain left out is the credit and collections piece. If you do not have a business plan that includes how your cash is going to flow the rest of your plan may never happen. Every plan must have funding.

A huge thing to consider as part of your business plan for the year is reviewing your historical payment trends to predict cashflow. If you track the payment trends year over year you will see trends emerge. This ties directly back to your credit and collections program. What changes do you want or need to bring about within that area to support your business plan?

Review of your past credit granting and collection performance over the past several years and a deep dive and analysis of the data and your processes will enable you to identify the gaps, make adjustments and structure your credit/collections program to support your business plan.

Once you have identified the gaps and put refreshed processes in place you can make the progress toward your goals part of the overall business plan. Typically in many organizations, credit, collections and other back offices processes are "set it and forget it" items that are often considered necessary evils but if reviewed regular with other business plan items you can hit the objectives and help make it a successful part of your plan.

No business can survive without a consistent cashflow stream which is feed directly from how well you manage your accounts receivables.



Why Your Employees Should Attend Roofing Day

By Charles Antis

RCS Influencer Charles Antis shares some stories about the impact that inviting your employees to Roofing Day has with legislators.

Editor's note: Watch Charles, along with two employees, Fernando and Jesus, share why it was so impactful to have them attend Roofing Day last year. Or you can keep scrolling to read the transcript below the video.

<https://youtu.be/Wj2wqeIUWQQ>

Hi, this is Charles Antis. I'm the founder and CEO here at Antis Roofing in Irvine, California. This month, I'm joined by two of my teammates, Fernando in Estimating and Jesus, a Field Supervisor. The reason they're here is, these guys have gone with me on the multiple journeys back to Washington. This month's topic is, are you going to Roofing Day in DC April 21st and April 22nd and if you're going to bring your employees. I want to tell you some stories about why it's important to bring your employees, because when I go, they're used to hearing me. I'm the CEO, I'm used to pitching and it's the same song and dance.

Charles: When a Congressman and when a legislator and their team, hears the people that do the work and then from the presence they see and they realize and we tell them that there's over half a million of us out there, it has great impact. Like the time that Fernando and Jesus and I went to Washington and we sat in Mimi Walter's office and we went around the room, 40 of us introducing ourselves and I, "Hi, I'm Charles Antis." They got to Jesus, and Jesus, by the way, just talk. Say my name is Jesus.

Jesus: My name is Jesus and I am from Antis Roofing.

Charles: That's what he said, but when he said it there it was, it was like, "I am Jesus." That's not it. It was profound because you are the face of roofing as it exists in this company, over half a million strong. We have mostly immigrant labor, and I love it. Fernando, you had the same experience. We set in that same office.

Fernando: Correct.

Charles: You are a second generation in this country.

Fernando: Correct.

Charles: You don't have the accent, but you are somebody that's gone from the field, now is an estimator.

Fernando: Correct.

Charles: You know what it's like.

Fernando: Definitely.

Charles: Okay. Last year, Jesus also two years ago, met Congressman Lou Correa. What was phenomenal is, he got pulled. There was 500 of us there in Washington and he got pulled by himself. I am this experienced lobbyist, and how come I'm not going to go see Congressman Correa? He went by himself in there and the reason he went by himself in there is, he lives in Congressman Correa's district. When he went in there, Congressman met him one on one and what was so profound about that is, Jesus had an amazing experience because his daughter's studying political science and he

talked about it and she talked him into going to Washington and it was so uplifting to him and to our employees and to our team.

Charles: When I saw Congressman Correa at a fundraiser the next month I went up to him so excited to go, "Congressman Correa," and I hadn't even seen him for a year or two, and I said, "you have no idea the impact that you had on my employee, Jesus. He cut me off and he grabbed my arm and he said, "Charles, you have no idea the impact that Jesus had on me."

Charles: He said, "I wasn't even going into the office that day because I've been working so many hours sleeping in the office. I saw that this man, not even an American citizen, but a legal resident, who was going to meet me, and I came and met him there."

Charles: That story resonates strong in our culture, and so does the story of last year being in DC at the PAC meeting, at the political action committee meeting and I got a text from Katie Porter who he had met, Jesus had met the next year, this last year. I had asked her previously a few days earlier, if she remembered me. She said, "Charles, I remember you and I remember this employee that you brought." Those stories of our real people mean a lot. In fact, at the end of this, I'm going to play the tape of Katie Porter when she came and visited us here at Antis campus three weeks ago. Come to Washington April 21st and 22nd and bring your employees. Yeah, bring your executive team, bring your PR people. Let's do this but bring those that do the work and let your company and our brand have that lift. Thank you. Good job guys.

Fernando: Cool.

Katie: You were the first business who has brought one of your employees with you, not just as an executive, but an employee. Most people in Charles's position, no offense, will that they bring their kid, or they bring their number two or they when their government affairs person, and that's nice. Those people have information to share. But it really meant a lot to me that you were giving your employees of literal voice in Washington.

Jesus: [Translated from Spanish] We'll see you in Washington, D.C., April 21 and 22.



Were You Deemed Non-Essential in Your Area? File an Insurance Claim

By Seth and Ashley Pietsch

RCS Influencers Seth and Ashley Pietsch say that contractors may have options even if pandemics are not covered by business interruption insurance.

These are times like we have never seen in our lifetimes. It's resulting in contractors having to change the way they do business. As of today (March 30, 2020) our state of Oregon still considers construction an essential business. Contractors are having to adapt to follow OSHA's guidelines on social distancing. We are seeing them use Zoom for safety talks. You can no longer huddle around the truck or gather to review a site plan. That's obsolete now.

Contractors need to do whatever they can to try to be in compliance with these guidelines. We don't know if this is temporary or will become permanent but are hoping we will be back to normal in six months.

We've been getting a lot of good information from our fellow RCS Influencer Trent Cotney. He's published many articles and hosted webinars that we are following in order to stay on top of the latest updates. Things are changing so rapidly. Here in Oregon executive orders are coming out weekly as to what businesses must shut down and what is considered an essential business.

Every single jurisdiction will be different in what is considered essential, but things are still very similar in most geographic regions. We are hearing from our contractor customers that they want to know how this is going to affect them and if they have potential insurance coverage if they have to lay off employees or shut their business down. Right now, even insurance companies don't know how to respond.

What they are telling us is that every single claim scenario is different and each one has to be treated like it's on its own island. This pandemic caught every business off guard, even insurance. The Insurance Services Office (ISO) which is an insurance advisory organization that provides statistical and actuarial information to businesses with a focus on property/casualty insurance had to scramble to create product developments, including forms and rules changes that are being released in response to COVID-19.

Most insurance companies don't provide coverage in the event of a pandemic. When the September 11 attacks happened in 2001, insurance companies didn't provide coverage for terrorist attacks. They said that it's excluded, but the federal government stepped in and enacted the Terrorism Risk Insurance Act. There is a chance that the federal government could mandate that insurance companies have to pay out a certain amount on these COVID-19 claims.

Contractors should absolutely file a claim with their business interruption insurance company if they are deemed a nonessential business. It is important to be in direct contact with the insurance company and the insurance adjusters since the situation is so fluid.



Planning is Key to Trade Show Success

By Mike Pickel

RCS Influencer Mike Pickel says that having a good trade show plan is critical whether you are an attendee or an exhibitor.

Editor's note: Mike Pickel stopped by the RCS booth at the 2020 International Roofing Expo and we captured this video of me interviewing Mike about his trade show strategy. You can watch the video below or scroll down to read the transcript.

https://youtu.be/13DHQmN_R-A

Karen: Hi everybody. This is Karen Edwards. I'm the editor here at RoofersCoffeeShop®, and we are at the International Roofing Expo, the 2020 International Roofing Expo in Dallas, Texas and look who stopped by our booth, Mike Pickel, one of our RCS influencers. And the timing's perfect because February's topic is trade shows.

Mike: That's right.

Karen: So, the International Roofing Expo is a pretty big show. There's a lot going on.

Mike: It is huge.

Karen: So how do you make the most of it and maximize your time?

Mike: We plan before we come into the show of vendors that we want to talk to, whether it's a manufacturer or a supplier, technology, whatever it is we've been using throughout the year. We want to talk to them to answer any questions first that we've developed throughout the year using their products or their services.

Karen: Do you attend the educational sessions as well?

Mike: The morning sessions, we hit every one of those. We try to hit the ones during the show, but we kind of hit and miss on some of those. But we look for the ones that we must be at and then we will go to those.

Karen: Do you feel that attending the education sessions and the trade show itself is beneficial?

Mike: Oh, absolutely. I mean, after we get done talking to those that we target, then we go through the show aisle by aisle, and we'll start on one end or the other so we don't miss any aisles to see what new products or technology. I mean, we're paying to come to the show. We want to see how people can help us in our business.

Karen: Great. Now, you're an attendee at an industry trade show today, but you also experience trade shows in the opposite. You're a vendor at some home and garden shows. How do you maximize that?

Mike: We select the shows that we're going to go to that will fit our business. We don't just go to anything just to try and pitch our business. We try to target specifically. Then when we're at the show, we try to make a simple presence, an inviting presence in our booth, and then we don't go into the aisles to attack people and drag them in. We look for the eye contact that we may have piqued somebody's interest, and then we'll see what they want to talk about. They may want to set up an appointment with us, they may want to talk about roof issues they're having, or they just may want to talk about products to see what's out there. We try to listen to them and then serve them however we can.

Karen: Yeah. Great. Well, thanks for stopping by to talk with us about it and enjoy the rest of the show.

Mike: Thanks for having me.



Three Keys to Successful Trade Shows

By Mandy McIntyre

RCS Influencer Mandy McIntyre says that planning, engagement and follow up help her company find success at every home show.

Editor's note: Watch Mandy's [video here](#) to learn how she makes shows successful or you can scroll down to read the transcript below.

Hi, I'm Mandy McIntyre with 1st Choice Roofing in Cleveland, Ohio. Here to talk to you today about trade show strategies. I am at our booth for the Home and Garden show. It's our annual trade show here in Cleveland. We have three keys, three components, if you will, for successful trade show. Those are planning, engagement, and follow up.

We'll start with planning. Because anyone that's ever done a trade show knows there's a lot of planning to be had. What we did this year is we had a team meeting, we had our list A to Z, everything that we're going to need. From booth logistics for set up, literature, scheduling who's going to be working the show. We laid it all out, we assigned specific tasks and delegated those tasks to specific people. So if there's a question about something or something's missing or something's not right, we know exactly who to ask. I'm a big advocate of the five P's, proper planning prevents poor performance. We planned extensively.

Second key, engagement. This one's big. Because no matter what you're selling, whether it is a product or a service. What you are really selling is a relationship with a potential customer. We make sure to engage with those potential customers by actively listening, by making eye contact, smiling, not eating at the booth, not looking at our phones. This really comes from experience as both a trade show attendee and a trade show exhibitor. Because I've stepped into a booth before, genuinely looking for information. I have questions and no one comes up to talk to me. It can be really off putting. When you see a couple of people working at a booth and they don't come up to talk to you. I'm just going to go to the next business, which would be their competitor. We really want to avoid that. Because everybody that comes into our booth ... that comes into your booth is your potential customer, your potential client. Engage with them, listen to them, smile.

Third key is following up. No matter how much money you put into your booth, if you don't follow up with your potential customer or clients, you're not getting your return on investment. Because that's what we're all here to do. Build those relationships, get new customers, get new clients. We have a database, a spreadsheet. We put everything in electronically. We make sure to take all their information, read it back to them, make sure the address is correct, the email, the phone number. If they're writing information down, make sure you can read it. And take notes about them personally. Sometimes someone's going on vacation, or they have a surgery coming up, or a wedding, or an event at their house and they want their project done in a certain timeframe. Take those notes down, when you go to follow up and you bring that up to them. That shows active listening and that really strengthens the relationship that you are trying to build.

Those are our three keys. Planning, engagement and follow up are keys to a successful trade show. I hope this information helps. Thanks for watching. Have a great day.



Using Technology to Run Your Business Virtually

By Michelle Boykin

RCS Influencer Michelle Boykin says that now is the time to use technology to your advantage.

The most important thing that we were able to do at Rackley Roofing is to try to keep everything as normal as we can for everyone. We are fortunate to be in an area where we have not been shut down yet. Our company has always used a lot of technology, so really the only thing that has changed for our employees is their office location since they are working from home.

Our message to our team is that your office location may have changed, but things are going to operate as normally as possible. If you normally start at 6 am, start at 6 am. If you normally start at 8 am, keep starting at 8 am. The same should apply for your kids. If they are used to getting up at a certain time every day, keep doing it. We are living in a time when you don't know what is going to happen next so it is really important to just keep everything as normal as you can.

Not everyone has the necessary technology in place to function remotely, but some tools are easy to start using. Nobody wants to spend money on software right now, but a lot of solutions are free. We use Slack for communications and Zoom for video conferences – solutions that also offer a free version. We bought the Zoom Pro version for just a few employees that we knew would need it for more regular meetings. Don't forget about looking at what you already may have and making that work, for instance, if your employees have iPhones, you could FaceTime.

We've found that our communications have gotten better because we are being so intentional about it. Everyone is in a meeting via Zoom every morning for a quick check in to see how everyone is doing and see if anyone needs anything. It's important to keep that face-to-face interaction. It gives employees a reason to get up and get ready each morning.



Owners Need to Respond Quickly as the Market Changes

By Trent Cotney

RCS Influencer Trent Cotney says to pay close attention to your contacts when projects are suspended.

The roofing industry is often impacted temporarily by state and national disasters, but the unprecedented coronavirus (COVID-19) has forced many roofers to suspend work on projects with no end in sight. Others are able to continue their projects but are now concerned about their contracts, payment and OSHA. It seems inevitable that numerous other contractors will find themselves faced with similar situations in the coming weeks.

For some contractors, business interruption insurance may be the first thing that comes to mind during a project suspension. While business interruption insurance has its place, contractors should pay close attention to their contract and analyze their exposure to a loss while the project is suspended. When faced with a suspension, quickly consult a licensed insurance professional and an attorney experienced in construction law to assess your exposure and contractual rights.

Given the economic climate, taking all reasonable steps to ensure payment are critical. One step to get closer to receipt of payment is proper filing of liens. Liens are granted to providers of labor or materials for construction projects and are an important legal protection. Additionally, liens are often included in agreements to secure loans for construction finance or purchase of large equipment. Filing a Claim of Lien for your projects will provide an alternative method of payment long term. Necessary deadlines, forms and procedure vary by state and the validity of a lien relies on those being closed followed.

OSHA has released guidance related to COVID-19. The primary take-away is that a work-related infection of COVID-19 should be added to all OSHA 300 logs and reported directly to OSHA if it fits set criteria. Additionally, employers should ensure they are aware of any work-related exposure to the COVID-19 virus. Whether an infection is considered work-related may be unclear. If you have discovered an employee is infected with COVID-19, consult with an attorney or safety consultant who is familiar with these rules to determine if the infection must be recorded or reported to OSHA.

More than ever, business owners will need to respond quickly and appropriately as the market changes to ensure the success of their businesses. Looking at the big picture for your business and outstanding contracts will help to determine what smaller steps are needed to get through this national crisis. If you are looking for additional resources, please check out our COVID-19 resource page at: <https://trentcotney.com/covid-19-resources/>.



Making Connections is Key to Trade Show Success

By Charles Antis

RCS Influencer Charles Antis says that his business crushes it at trade shows by getting to know people.

Editor's note: Watch Charles and his sales manager share their trade show strategy. You can scroll down to read the transcript, but you won't get to see the great photos!

<https://youtu.be/eDtYjLP4I8>

Charles Antis: Hi, I'm Charles Antis, CEO and founder here at Antis Roofing, and this month on RoofersCoffeeShop® I'm joined by my employee and good pal, Devin Winch.

Devin Winch: Hello, hello.

Charles Antis: And he is our sales manager here at Antis, and he does lots of trade shows. But let me tell you about trade shows. The first trade show that I remember doing maybe 20 years ago, is I had these little pamphlets and I had them printed and I fanned them out on a table and I waited for people to come to me and I handed them my card. That was my first trade show. And then the next time I went, I didn't want to underwhelm people, so I went out and bought this trade show booth and it was so awesome. It was only \$6,000 and it took us about seven hours to set up. I hope we have that picture and it's flashing right now. But Devin, we have better strategies today. So rather than me tell you all the fails to get to where we are now, we crush it at trade shows and we get to know people, and how do we do it?

Devin Winch: It's about connection. You want to connect them to the booth. You want to be mobile; you want to make sure that you can engage the client. That's the biggest factor. People who are tied into their actual booth area, the little 8x8 square that they give you, it limits their ability. So, you want to choose a theme that is going to give them mobility, you want to choose something that's going to give them a connection. And I've found, and what's been successful for us here at Antis, is connecting to the childhood. We usually think of themes that will invoke a sense of that connection to a person's childhood, depending on the age range. You got to be kind of broad, but it truly brings the people in. They want to take the photos with you, which is another key. You want to make sure that you have photos available, a person ready to take pictures and/or a photo booth.

Charles Antis: We love photos.

Devin Winch: And so do people in general. If you notice by Instagram, Facebook, and Twitter, everything, people are always going to want to see themselves out there and engaged in the world, and that's what they put out there. So you choose something that's going to give them connection, maybe something that can tie into their childhood passions or love to bring out that sense of fun, and then cap it off with a photo, obviously some good literature and a business card to tie it all in together for the business side of it. But after that, you'll have some customers for life.

Charles Antis: Love it. Thanks, Dev.

Devin Winch: Definitely. Rock it.



Is Your Business Plan Flexible?

By Charles Antis

RCS Influencer Charles Antis explains why flexibility and putting people first are the most important parts of your business plan.

Editor's note: Watch Charles talk about the importance of his business plan in the video below or scroll down to read the transcript.

<https://youtu.be/0m51bxOeeFE>

Hi, this is Charles Antis with Roofers Coffee Shop, and I'm the CEO of Antis Roofing here in Irvine, California. And this month's question is how important is your business plan to your business?

That just makes me think of all sorts of things, so I'm going to go in three directions. At first off, I'm going to tell you about when I started my business. It was 30 years ago, and I didn't have enough work where I was working and I had one skill, I could repair anything that leaks. And so, I would beg for calls and I would tell people, "Give me the thing that you can't fix that leaks and I'll fix it for free. Then you'll know that I'm good and you'll trust me to repair your leaks." And I got about three calls a week and that's how I built my business. That was my business plan without having a business plan because that's what I was doing.

After a while, I didn't use these words back then, I developed a business plan and it evolved out of that leak capacity. I discovered that there was a lot of opportunity where everyone was selling roofs that we could sell, repair, and maintenance and prove a much greater value to the homeowner. So that was the direction that I chose and that in part became our business plan. Our business plan also eventually included HR factors and external factors like marketing. It also included financial factors; I didn't know what it was. When I started my business, I didn't know what EBITDA was. I didn't know what true earnings were, but now things are different.

What I want to talk to about, the most important thing though, is the answer of this question of what you need to do to prepare is different today than it was 10 years ago, because 10 years ago a business plan would keep you in tow in the roofing industry for five years because a business plan in any industry would keep you in the right direction for one or two years. But today something's happening that's entirely different, and there's futures that you have to throw into the business. Things are changing so fast.

Let me tell it this way. 60% of the jobs that we will work at in our country 10 years from now haven't been invented yet. So, the most important part of your business plan moving forward needs to be flexibility. Walt Disney Corporation, I'm close to their Richard Ramsey, Vice President, Human Resources at Disney, and he described to me what Disney does. Disney has futures training; they study the future. So now they have a six-month plan that has three contingencies, one for a good economy, one for a bad economy, and one for a black swan economy. And that is that unexpected, awful thing that you have to prepare for.

I don't want to prepare for that. I don't want us to get that drastic. But in the roofing industry, be flexible, pay attention. The lack of labor and the use of technology is changing things. The cost of labor is changing things. If you want to survive in the roofing industry, be flexible. And if you want to invest in the most important part, it's investing in your people because as things change, the most important part is going to be able to hang onto your people.

So, in your flexibility in moving forward, make sure every part puts people first. And whatever you're spending on people in the past to keep in your company, I think that's going to double. That's our plan for the future, putting people first. I hope that helps. Thank you.