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PANELIST

John Kenney

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Heidi Ellsworth:

... Would not be good.

Speaker 2:

All right. You're going to do great everybody. I'm going to start the webinar in about 20 seconds.

Heidi Ellsworth:

Perfect.

John Kenney:

Let me fix my hair.

Heidi Ellsworth:

I know.

Speaker 2:

Thank you.

Heidi Ellsworth:

And you can't go too far back or you go out. Okay, we're recording.

John Kenney:

I know.

Speaker 2:

All right. We are live.

Heidi Ellsworth:

Hello everyone. And welcome to this. Month's RLW read, listen, watch on Roofers Coffee Shop. My name is Heidi Ellsworth, and I am so happy to have you all on today for this educational opportunity. We bring on some of the best thought leaders in the industry to share things that you need, education, continuing education in all formats, whether you're reading it, listening to it or watching it like you are right now, we're bringing it the way you like to learn. And today, we are bringing some very, very exciting information from my friend, John Kenney of Cotney Consulting on how to utilize online service and training. Hello, John.

John Kenney:

Hi, Heidi. How are you today?

Heidi Ellsworth:

I am great. Thank you for being here. I am so excited about this RLW, it is going to be amazing. And so before we get started John, let's do a little bit of housekeeping. So first of all, as you all know, this is

being recorded. And why do we record it? So that you can have it anytime you want to share, to watch again, to share with your employees, with other roofing professionals.

This is the type of content that continues to improve the industry and help you and your business. It will be the recording all in three formats. We'll be able to read it, listen to it through a podcast, or watch it on video. Will be available within the next 24 hours. We are going to be taking questions today. So as we go along, put your questions into the chat. Don't wait, get them out there, but then we will answer all those questions at the end of this RLW.

And if any don't get answered, John will get right back to you afterwards and answer them because that's the kind of guy he is. So be sure to use the chat box and as always, Megan Ellsworth, our producer is in the backend and she is there and she'll be chatting, sharing links, sharing information as we go along. So if you have any questions or concerns, be sure to chat with Megan and she will take care of you. So John, are you ready?

John Kenney:

I'm always ready. Glad to be here.

Heidi Ellsworth:

I'm ready too. For anyone out there who maybe, I don't know, one or two who do not know you, John Kenney is the Chief Operating Officer with Cotney Attorneys and Consulting. He has been in the roofing industry forever and has done everything there is to do in roofing. His experience as a top 100 contractor or working with top 100 contractors is impressive. And his leadership within our associations in the industry is just off the charts. So once again, John welcome.

John Kenney:

It looks like a great day almost across the entire country and weather wise. So I think we're all happy to see that and getting into the holiday spirit. So I think this is a fantastic time to be doing one of these, so I'm ready to go.

Heidi Ellsworth:

I do too. I love it. I love it. So John, let's start out with, okay? Teasing you saying you've been in roofing forever, but you've seen it all.

John Kenney:

True.

Heidi Ellsworth:

You have seen it all. What are some of the traditional ways that people have gained training in for legal or getting resources for HR or estimating. Talk a little bit about some of the more traditional ways that have been happening in the last 50 years.

John Kenney:

So, I think to really do proper justice, I think construction industry and the roofing segment of that in general has always been behind in training. That's been my experience throughout the decades, working in the industry. There's been segments of it. I know a little brief history, when I started out, I started out on the union contracting side and there was an apprentice program, I actually worked with the local union up in the north in New Jersey on that program. It was like in its infancy just coming out in the late 70s, but that's workforce training, right?

That was trying to get you to be a roofer work in the field. And there's still sporadic trainings of different sorts out there. And what I mean by that is that we never moved into a national apprenticeship program similar to other countries. So we're different. That's great. We love to be different. So really what's left to is that in-person individual company type training or an organizational type training where you gather and still in use today. I mean, even here at our training center, we still have in house live events. So it's still part of it.

But to get that, to get that travel, you got travel, you got expenses, a lot of times, regardless who do you got a contract you're signing, you're guaranteeing, whatever two, three days, hotel rooms, the whole thing, so there's a lot to it. It's got to be set up. You got to make sure you shut down your operations during it. And that's really what in-house training and in-person training.

So I've seen that model derive throughout the years, especially on the field side, but I've never really seen a whole lot of specific training for the other positions that we have in the industry, administrative, leadership, they're there. I mean, please, anybody listening, I don't want you to believe that I'm telling you, they're not there. They are, but it's not a whole method again. How would you get it?

Maybe you go to convention and you sign up for a class and you do it again. It's travel. It's all the in person. So, that's definitely how it's been. And it's still here today, but there's some new ways that I know we're going to get into here in a few minutes.

Heidi Ellsworth:

Well, and you know John, I really see with what's happened over the last couple years obviously with COVID and just overall with the technology advancements, this really this staying stuck in the old way of training is really like, as you're looking at it, having to be in person doesn't always work. Now, sometimes you have to. I mean, you need to get your hands on things. You need to do the demos. You need to work to train that way, but there's so much that can be done online today and it's so great for the roofing companies. So let's talk about this a little bit. We are seeing a huge increase and not just over the last two years, longer than that, increase on online purchasing and learning, what are you seeing?

John Kenney:

Yeah. There's no doubt about it. You're seeing more and more of it, and that's why we are focusing our efforts onto expansion out into those areas of training online for reasons as you have here, I mean, let's face it, it's ease of use, right?

Heidi Ellsworth:

Yeah.

John Kenney:

So you don't necessarily have to shut down your entire operation to do the training. You may set it up where you may want to compensate employee on a Saturday to do it, let's say, or for an employee that is not being sponsored through an employer and they want to learn to advance themselves in a career, you have the availability to do this pretty much as will, at will, whenever your time of those. And it's a la carte. So you don't necessarily like going to college or taking a Vo Tech, you don't have to take the entire portion of it.

And I know we'll get into some of the things we have and you'll see that it's broken into stages, but you don't have to take all five. You can take one, you can take, a section of it. You can jump ahead, whatever you like to do. And the biggest part is you're on your own time. So it works. I know I have always preferred learning on my own, over a classroom situation, mainly for the reason is that it can adapt to me.

So sometimes maybe I want to learn between 9:00 and 11:00 at night because that's when I was coming up with raising a family, kids would be in bed, that was my time to be able to learn something or sometimes you want to get up early in the morning and do it before you go to work. So you have that availability.

But I think the key to this, Heidi, you talked about it, learning styles. So if you're an employer out there, or if you're one of the ... If we talked on other ones, there's multiple generations in the workforce right now. I think you have four, you got Baby Boomers, you got X's, you got Millennials and you got the Z's, correct?

Heidi Ellsworth:

Yeah.

John Kenney:

I know when you're at Metacom, you touched on a bunch of these there. But every generation learns differently. So I want to let everyone know that with your company, as you're developing these training styles, right, for the learning, you're going to have certain segments in certain generations that only want to do online training. And then you have other generations that maybe and your Baby Boomers, or your X's that like a combination of both, so that's what we've done with this.

We have downloads, we have the workbooks, we have all that, so it works for both, but keep that in mind when you're putting your training together. And I know we're going a little bit deeper into that, but it's important to understand how each generation learns.

Heidi Ellsworth:

It is. And John, one of the things that I've been finding that's so amazing or interesting too is even as the older generation where I am on Gen X, probably a little close to Baby Boomer, I'm learning these new learning styles, righty? Before I thought, "I don't want to watch videos. I don't want to listen to podcasts." Well, now all of a sudden I am because it's just gotten so easy and it's just such a great way to learn. And so I think it's essential for the next generations, but I think it's actually becoming, that shift is happening in the older generations too.

John Kenney:

Yes, it definitely is. The digital world is here to stay and we're in the wild west of the digital world, even though we feel where they know like, "I'm a baby boomer." And like you say, you're at the X Generation we saw where it was very little technology, all the way up to where we're at now, but this is the ... We're just getting into the jet airplane. We haven't even got to the moon or Mars in technology yet.

So you're going to see, you got to get on the train because as the younger generation comes up, they want less and less to do with real world hands on training. They got to learn in that virtual type setting. And then they're able to put it into real world. You're going to find that more and more as the generations progress.

Heidi Ellsworth:

Yeah. And when you talk about the Amazon generation, we're all used to purchasing online and that is making a huge difference in how people are getting what they need. So let's talk a little bit more. Let's go a little bit deeper on that, integrating the online purchasing and consulting into your business, right? So if you're one of the few who are not doing it, or maybe you're just touching on it, what are some of this steps to start integrating some of this online purchasing and learning into your business?

John Kenney:

Sure. So, again, I got to take this. So what I recommend here is when we work with people or just general recommendations that we're going to cover, I come from the other side on the contracting side and I get it. First of all, you're skeptic. It's just built into us. You're skeptical how to do this, you got consultants, you got training, there's so much out there, I'm bombarded with all this.

It's like Black Friday sales, right? Everyone's got it. What do I do? So look at it this way, have a plan, that's the first thing you should do before you do anything in your business period, but especially when it comes to doing technology training, any of this, sit down, talk to your key people. If you're a smaller company and you are the only key person, talk to your wife, talk to your husband, talk to somebody that understands it, a mentor type person. Run through it.

So you put a plan together, what do I need? What positions do I have now? What could I do to get these trainings on place in that? So you think about it. You're not making any decisions yet. You're just mapping it out. And you got to make time. You got to understand, you have to make time for training no matter what it is.

That's part of the retention problem today that I've been really delving down in the HR world reading is especially in the disease in the early millennials. If they don't feel there's training or any kind of advancement ahead of them, they leave. You got them one or two years and they are absolutely gone. It's not about the money. It's not about benefits. It's really not. It's about, they want to learn more.

They love to be cross-trained. That's where training comes in big time. You can cross-train very easily. And I always recommended work with your employees. Do not make training a solo decision. You want to explain why you want to do this, the benefits to them. This is not about saying, "Hey, you don't know about your job. We want you to learn every possible thing that you can and experience. I want it to be a great experience."

Heidi Ellsworth:

Yeah.

John Kenney:

So that's the first part. Right? And then create learning spaces. So whether it is that you've got an employee that can show you their training at home, because all online training has a way of knowing whether you complete a course, whether it's a certificate, passing grade or you get a report. Sometimes they want to learn at home. That's okay. Don't discourage it because you don't want to discourage that to move ahead.

But if you're going to do it in your place of business, have a quiet area. Don't have it where they're trying to watch and learn online and somebody's knocking on their door, they're coming in. Have an area set aside that they can go and do this training and feel comfortable, even if you've got to go rent a room, if you've got to enough people taking it, go do that. Go get it so they got a place to go.

And you got to have the right equipment, which honestly, for online training, I think most people have that now. You got to have a decent computer and internet hookup and good video cards. But I think for the most part, we're there, even the basic computer you buy today usually meets that. And it's great for recruitment. Use it, brag about it. Heidi, why would I want to come work for you? Right?

So you're talking to me and you're saying, "John, I'm bringing you in at this entry level position, but we have this training platform laid out. It's all online. We can take you, you want to be an estimator? We'll teach you to be an estimator. You want to be a project manager, we'll get you there. Right? We have a map to give you the skills that you need. We want you to be here."

Now as an employee, I'd be excited. That generates that explosion inside of me, great. Or you go to another company, "Well, we're going to see how you do in 90 days. And then whatever, we'll give you 10 cent rate." Those days are gone. That's what we grew up on, give you a kick in the butt. So use it as a recruitment tool. Very, very valuable.

Heidi Ellsworth:

Yeah. And you know what? I love John, how you talk about too, about really talking and communicating with employees, because sometimes you might assume that they have a computer at home and they don't. And maybe they have one at work, but it's not mobile. And so really asking those questions. So I think you're right, so many of us just assume everybody has this, but they don't. And if you're asking someone to learn, do online learning off their phone, that's a lot harder.

John Kenney:

It is.

Heidi Ellsworth:

So I think that that is really ... everybody out there, nuggets, take a picture, take a shot although it'll all be available afterwards. So, okay. You guys saw this, you, Trent, the team at Cotney really saw this need and you brought out something that's just like right into the mix as usual with shopcotney.com. So why don't you tell us about that?

John Kenney:

Yeah. So everything that we have, it's not just training. It's not just documents. It's not just anything. We're trying to give that full experience of what you need because at Cotney, being attorneys and consultants, we have full range of full service. We knew and we felt and definitely as you see the way the industry is going, you got to make it easy, it's got to be an easy purchase. You just got to get the information out, but it has to be good.

So I'd like to say that all of our training is up, but it's not. It's going to take more and more time. Trent and myself and everyone that's on our team, we are a stickler for quality. We want to make sure before we release anything it's gone through, it's been checked out, it's been tried and looks great, works great, gets it out, get feedback. So it takes a little time, but it's all here. Once it's here, it's here.

So the advantage to this is you can go on to shopcotney.com and it's broken into the different categories. If you want to look up the training, you click on the training button. You'd go there and you'll see the trainings we have. And we have a document area, which is absolutely fantastic. It covers most of the documents and we're adding more each and every single day of not great templates that are customized for you to customize, they're there for the industry to use and to actually be able to put into your business.

So, example, geez, I need a safety plan, right? You go on there, there's one. You need help with appointment manual, it's on there. You need to know how to manage your subcontractors, it's on there and so on and so forth. Right? So it's there anything that you need. Research, we're trying to have all kinds of resources on there like the books that we've written, we have the manuals, all that stuff is available.

It's a great site for resource. Absolutely. I recommend you go take a look not because it's just ours, but you'll see if you watch this and you're are interested, go take a look around the site and you'll see why the buzz is getting there to have all this in one spot to get a hold of.

Heidi Ellsworth:

You know John too, I think it's really important to point out that in the past, we started out this talking about traditional ways of purchasing or getting consulting or help and that really includes legal also. But in the past, contractors have had to spend a huge amount of money to go and spend time with lawyers or consultants or whoever and to get a big package that maybe they didn't need that whole package or maybe they just weren't ready for it yet. So if they weren't ready, they did nothing and then they're at risk. That's what I love about what you've done here with shopcotney.com is that you are actually allowing them to come in and get information beforehand and to understand it and maybe they only need that one document.

John Kenney:

And we encourage that and they're there from all price ranges depending on the package. So if you're a small business and you're just starting out and you may need 50 documents, this is an example, but you can only get 10 a month because that's what your budget is, how about it? That's what it's there for. Pick out what you need most now. Next month, come back and get some more and so on and so forth. That's why it's there. It's there for you.

Heidi Ellsworth:

It's so smart. So smart, and I think really necessary. Now, let's dive deeper into that a little bit, because you talked about the resources and there are some necessary resources. So maybe let's just talk about some of the things that people can get without a full plan, but also then can move into the full plan as needed in some of these areas.

John Kenney:

Sure. So, start out with legal. So there is an area you go to. It's on there, it says legal, you click on that, you go in. And what you're going to find is a product that our legal side has called, "GC on demand." So general counsel on demand. And you basically have three packages, and it's meant for that company that wants to have the security of having a lawyer on their team, but not really know how much they may need them or when they're going to need them but when they know that ... Well, let's face it. At some point in time, everybody needs an attorney.

We laugh. Trent and I go back and forth, nobody likes attorneys, right? I do. We work with them every day and that, but really when it comes down, it's like going to dentist. When you need them, you got to go. It's as simple as that. You need legal, you want to be there. So we have these three packages and you can purchase five hours, 10 hours and 20 hours. And they're very reasonably priced. And they're there for that contractor just to have that security.

Maybe you want a legal contract with you, you only need one. So you go purchase a small package and it's there and it's taken care of by the legal team. Or you want to make sure that if somebody threatens you along the line, you've got this package, you pick up the phone, you've already got your attorney assigned, you get an attorney account manager, it's all set up making a fantastic experience. Recommend if any of the companies starting out, existing companies, companies that have been around for 50 years, it doesn't matter if you just want to have that security, first time buyer getting out there, go check it out.

Then we have our training section. So under there, right now we have the full estimating training is up, which I know we're getting deeper into that. So I won't go into a whole thing, but under that training section, it's going to develop out and I know we're going to have another RLW coming up in January, which we'll get into later, I'll explain more. But the whole goal of the training to put this in a nice nutshell package is we will have training available for every single position that you have in the roofing industry, whether it's an admin position, field, does not matter, there will be training for you.

Consider this to be your HR onboarding suite. You can come here and pick your training out. And we have packages that you can contact us direct, where we can put these together for you, where you buy them in packages. But on this site, you can come in and buy whatever you need full suite and we'll be up to full suite. I know this is roofers only, but not only for roofing, we are also in other industries like HVAC, we're working on estimating, training and other.

So in construction and all, we'll have it covered, but look at it, I'm a roofer, so everything from my front desk up to my CEO, there's going to be training on here to get you this. So it will be here. Safety. We do a lot of monthly safety that's going to be on here for your safety meetings. We'll have onboarding safety. We will have safety director training coming out. So we'll have the whole safety covered. HR documents, again, if you go back to the resources, you'll find in there what you need for your job descriptions, anything HR related, onboarding documents, policies, procedures they're all going to be available. A lot of them are up now, but more coming up every week.

And this is going to be a great resource for the CEO and COOs of the company. So I always like to break this down. CEO is your visionary of the company. A lot of times they do act depending on the size as the COO too. So we're going to have those resources so that they can take themselves to the next level, get their company to the next level, all kinds of tools to get you there. And then the COO resources, that section's going to be geared for that rubber meets the road, operational, how to make things happen, all that.

So you're going to be visionary right on down to rubber meets the road there and everything is digitally downloadable. You can't go wrong with that and it's yours once you buy it. If you buy any of these documents, they're yours to do it. They're set up in templates, easy to use. If you go on there and you find you don't have something right now, contact us, because we probably have it in the works or we'll get it up right away. We just did that the other day with safety, checklists and so forth. We were in the process, somebody really wanted them, we just moved them to the top of the pile and got them up there.

Heidi Ellsworth:

I love the templates too, because being a small business owner myself, it's so nice to have those templates to be able to work through it and to understand it and to be able to see what's going on. I think that always makes things easier for me as I'm going through them. And we talked a little bit about this, but okay so you decided you're going to start doing your online purchasing, whether how that works or online training. John, what are some of the steps for them to get started doing this?

John Kenney:

Well, like you have laid out here, evaluate your needs, right? And this is where what I mean by evaluating your needs, we just made a statement we'll have training for every aspect of your business, but where do you need it the most? So I'm going to tell you, this is the common, this is the chicken before the egg in every construction company and especially roofing companies. Do I have operational issues or do I have sales and estimating issues? You probably have both. And that's just the way it is.

So no one's really needs more training to get them to where they are than the other. So look at it that way, but really what is your problem? Let's look at the training for estimating and operations. Break that down. Look at your bids. Look at your profitability of your jobs. Are you finding you've got estimating mistakes? Do you find that you have four estimators and they're all estimating in a different way? That just causes chaos throughout your operations team.

So I would in that case, suggest that you jump on that first, right? So if get your estimators all humming and we'll go into the different levels that we have to help you, but definitely as far as your operational, if you feel that you're pretty good on there, but you could be better, but you have some gaps, you need some project management training, you need some supervisory training, then start with that first.

And again, what I mean by that is don't worry about training your admin first if this is where your biggest problem is. Get this solved, train them, then work to the rest of your business. Team meetings, biggest failure I've seen in companies when they start to do training is no one ever asks the people that did the training what they thought, what did they learn? And most importantly, now that you've learned this, what can we do to implement that into our company to be a better company? I will tell you, people love to hear their ideas and you want to engage them.

Heidi Ellsworth:

Yeah.

John Kenney:

And that's important.

Heidi Ellsworth:

I would say even too before you do the training, asking in those team meetings, what training do you think we need? People don't ask that either.

John Kenney:

No, that's a good question. Let's jump on that real quick. So let's say I'm training my estimating team. I've got four estimators coming in. Worst thing I can do is go in and say, "Hey, I found this great estimating training. You guys really are a mess. You're all over the place. I need you to take it. Well, I'm telling you right now, you might, you failed." If you go in and say, "Hey, you guys have come to me, you said you had needs. You don't like to be unorganized." They're going to talk to them and say, "Look, I found this training. Joe, hey, you're my lead guy. You take it first. Let's see what you think about it." He takes it, he likes it, comes back, have another team meeting. Yeah, this is great. Everyone needs to do this, move on to the next.

You're correct, get that buy-in up front because if they don't want to do it, then you've pretty much failed before you started. In research resources and I mean, with anything that you do in business or in life, go check out what you can get from A and see what's out there in B and see what fits best for you. And if you did make a mistake, don't kill the whole thing. Don't say, because I know I've taken some training over the years and some have been really good and some have been really bad, but I still do it.

It's like reading a book, if you get one bad book, don't stop reading a book or you get it, well, watch one bad movie, you can't stop watching all movies. So don't do that with training either. And talk to experts like example, you can pick up the phone, you can email us, you can chat with us and ask questions. It's not going to be a hard sell. Our goal is not to force you to buy this. Our goal wants to be to give you the answers that you need to make an educated decision at what you need to do.

So don't be afraid to talk to people. We have a lot of people who call us and say, "Okay, who's taking your training?" We'll give them our references or who has used you for your consulting service. We'll give them references. Well, what other legal people have you worked? We'll give them references. So it's good. Talk to people, see what they think. Don't be afraid to do it.

And you want to make sure it is quick and easy engagement, right? So you got to make sure that it is going to be something that your employees or your team can easily sign onto access. The equipment's there, they're ready into it. And then this is where I guess I jumped ahead, get the feedback, right? If you know that they're going to take multiple lessons, reach out to them say, "Hey, how's it going? What did you think about it?" They're going to want to tell you. And if they're engaged, you're going to be successful.

Heidi Ellsworth:

And I want to touch back on that research resources because that's one of the things I do know about John, you and your team is that if there's ... You know you are so aware of the industry and we're also involved in it that you know that if there might be for what that person needs, their training might actually be with another company.

There might be training within another association because you're involved with so many associations. And so I don't think people should get caught up. And I think sometimes this happens where you think you have to train just with one company. Really, you want to look at what's the best fit for what your needs are at that moment. And it may be a manufacturer, it may be a distributor, there's just so many resources out there that are now available online. And so by talking to experts, you all, you can find out not just about what's with Cotney, but what's in the greater country. And I think that's so important as people get started making these shifts.

John Kenney:

Yeah. We run into that a lot. If we don't have it or what we have isn't going to be the best fit for you, I'm going to tell you where to go if I know. If not, I'm going to give you some resources. Anyone on my team will do that. Because ultimately, it's about what you need, not about what we perceive you need. And I think that is the success to the industry. And yes, there are going to be the certain things out there that we may never have, someone else may not have and it's a reciprocal back and forth. But you got to ask those questions. That's why it's important to do the talk to the experts.

Heidi Ellsworth:

I think so too. I think so. One of the reasons why we try to have so much of that, all those opportunities on coffee shop, because people need to be able to research that. So, okay let's shift. Let's go in a little bit deeper again and let's shift over to the estimating side, because really there's not that much estimating training out there. And I know that you work with the edge, you work with all the major softwares, you know what's going on there. So talk a little bit about the importance of estimating training.

John Kenney:

Yeah. So we got into this, developing this and I will tell you over the years, I did a lot of in-house when estimating training, we bring people in whether they had 10 years experience or 15, or they were newbies. To train in house I can tell you is a bear. Okay? And I think if anybody's listening that's tried it, I'll give you an example, our first modular is the beginner intermediate. I love to call that the hard skills. That's going to give you everything, understanding blueprints, construction, math, codes all the way up to all the division seven items, how to estimate them, gives you everything to know how to do that.

That takes about, I believe our course can be done with eight to 10 hours, somewhere in there, depending on it, you got multiple quizzes. You actually have to take a test to prove your knowledge of base. But what I wanted you to focus on is that eight to 10 hours, that's how long the training takes to do, but when I used to do the same similar thing in house, because I had other things going on.

If I was an estimator training, another estimator, I still have to get my bids out. I still have to do my job. It would take weeks if not a month or more to try to get maybe 50% of that knowledge to the new person on your team, because you can't be dedicated to training that. It's impossible because you're moving on. So that is the concept that went behind this because we haven't found a specific roofing estimating

training program out there. So I took that knowledge of all the years that I was estimating and training and put it into these multiple modulars of how to be your onboarding.

And if I say so, we've gotten some fantastic results back. We have an ASUS program out there of our candidates that have gone through and you can listen to them of what they feel about the program. And we've had people that are newbies all the way up to people that have been years in the business and they're learning something every day. So use it. So that's what I think will help differentiate your business.

Employee retention. A lot of people feel that I spend this money on training, I'm going to make them better, they're going to go to my competition. Yeah, that can happen. There's no doubt about it, but look at it in two ways. If you don't invest in them, then you've got the problem, right? Because they're with you and they're untrained. And eventually if they did move on, then look at it is that your small investment gave you more profitability and efficiency out of them why they were there and you've created somebody better for the industry.

And if the whole industry elevates itself up, that's really the goal. Everyone makes more money if everybody's more professional. So I always look at training as a valuable investment and you will retain your employees. Employees want to stay where they've got movement in training to learn. I think for a recruitment tool, we touched a little bit on this. I don't think there's anything better to use in training.

If you actually have a training program set up where you can recruit your employee and you're in that recruiting phase, because right now let's face it. It's an employee market. It's not an employer market anymore. So you really have to entice that employee to want to come work for you. And I know speaking to clients on the consulting side and through my own experience, it's never really money. It's not really money anymore that brings somebody to your company. It's the other things that you can offer them to move on.

So training, I know in the millenniums and down especially, they are huge into having training opportunities out in front of them, utilizing great recruitment tool. And we touched a little bit on the estimating fundamentals, this covers them all. I think this is probably a good time to talk about a couple of the modulars, correct? I know we're going into this a little later.

Heidi Ellsworth:

We are a little bit later. Go ahead.

John Kenney:

So at least I'd like to call hard skills. That is the hard, hard skills that an estimator needs to know from getting the job, how to sequence your estimates, how to put it together, how to understand the math. It's not just commercial. It's not just residential. It covers everything. So you're going to learn, when I talk about the math, you don't have to be a math major. We're going to give you the skills in the math that you do need to know.

And this is where our partnership came into edge. And like they said, their problem is people go and think the edge is the estimator, it's not. The edge is a fantastic, like another program that estimating tool, but if your estimator doesn't know how to estimate, and no software can do it for you, all that is is

calculations and organizations. Then we have the advanced modular in estimating, which I like to call the soft skills.

So what that one covers is how you do your submittals, how you write your proposals, how you meet with a client to sell a project, once you get the job, RFIs and change orders, understanding the estimator's duties and that, and also most importantly is how to put a proper handoff package together to get it from the sales estimating cycle to the operational cycle. That's an art that I find is not been taught very well in our industry. And there's a lot of money. You might as well take a lighter and burn your money up between your estimating and operations just in that handoff process.

And then at the end, we're going to talk a little bit in there about, and show you how to do a post job postmortem. That is something in the industry people don't want to do because it's like filing your taxes, you really don't want to know, but we teach you why this is a good experience and how to make it a good experience. It's not about pointing fingers. We walk you through the positives how to do it so that you can learn from not the mistakes, you will learn from them, but you learn from the positives and how to use that as historical data to move forward.

So those things are definitely very important. And the last thing I'll touch on, I'll say the other ones from the other slide, I know we got coming up, director of estimating. So one of the hardest things that I found going through the industry was how to run an estimating department. Like anything else I was thrown into it. There was absolutely no training for that.

You're like all of a sudden, "My gosh, I got three, four, five, six, maybe more people to report to me. I've never been a manager. I don't understand what I'm doing. I know how to estimate. I don't know how to run it." So that's what we do in that. We first of all just walk you through what the job duties are of that position and what should be expected of you, what your importance is to the company.

We teach you how to interview for new employees. We teach you how to work with your team. We teach you how to do reviews. We teach you how to give proper feedback, teach you how to do weekly meetings, the whole work. When you're done with that, you can successfully run an estimating department, fantastic management training. I'm very proud of what we've done with that.

And again, look at it from the company standardization. And we're happy to give you the white paper statistics on this, because we've done a lot throughout the years. If you have all your estimators standardized working the same way, producing the estimate the same way, that takes a lot of the guesswork out. So when you do an estimate, you should never make a material mistake. You should never make an equipment mistake. You should never take a roof off wrong. None of that, you should not miss units. That's learning the fundamentals, right?

Labor's a little bit different. That's used in historical data or gut feeling, talk to your operations team, everybody looks that a little different, but when it all comes out standardized, I will tell you, the studies show that you are going to add automatically five to 10% more profitability easily onto your projects.

So I don't know if everybody knows this out there, but of all the jobs that are estimated, less than 5% of them come within 10% of running over on budget. That is a scary thought. That's the industry average. That is a true industry average. So standardization, put that money back in your pocket. That's what you want to do. If your estimator is more [busy 00:40:10], that's where profitability comes in.

Let's face it. I know we all love to get up every day. We all love to go to work, but there's got to be something. As a business owner, what are you really doing it for? You want to be profitable. You share your profitability with your employees, your team, yourself, your family. Let's face it, profitability makes a happy, happy world.

Heidi Ellsworth:

Yes. Wow. John, that is awesome. And you know what? I know some of this we've been jumping ahead and talking about, and this is one of them. We've already talked about the training locations, how on online ring, but I would really love for you to talk just a little bit more about the process within the estimating training, that process of when they start through certification. How does that work?

[John Kenney:](#)

I really recommend, like I said, starting out with the first module. I don't care if you've been estimating 10 years. What I mean by that is I put this together so that it is a great review of skills. I will tell you that, when I was doing it on that side of the house estimating, we all get into habits, we all get into short, we all get into that, it's human nature. I've been doing this so long. I just do it.

Sometimes you forget about it and an ah-hah moment comes up, right? So if you take that and you're going through this training and you're like, "Yup, I'm good with that. I'm good with that." And then all of a sudden you're like, "Wait a minute. Let me back this up a little bit and listen to this again." That's why I'm having a problem. Right? You're learning something.

So I do recommend that definitely the next process is going, like I said, into the advance, I don't care how long you've been doing it. Those are skills you probably were never taught correctly because I will tell you almost any company that I've been involved with on work side or consulting side, they had their biggest issues handoffs between estimating and operations. That is such a lost art out there.

Back when I started, it was a matchbook cover, they didn't believe in that. If you were in the operations side, you got something on a napkin that said, "Here kid, go bring the job in." And if you're on the sales side, you're like, "Don't ask me any questions. You just do what I tell you to do." It doesn't work, you're eating too much time up. So we learn that. So that's really the process is you just jump and take it through.

So, I know we'll get into the certifications and the certificates of just a hair later than this, but the testing. So as you go through this at the end of every one of our modulars, there's a simple three or five question review. So if you get a hundred on that, you've absorbed the knowledge. If you didn't, you have the opportunity to go back and listen to it again, so you gain it.

At the very end, there is a test. You actually take a test and every question is based on something that you've learned. And it's not going to be the exact question, but if you're doing construction math, there's construction math questions in there.

There's questions in there on the different divisions and the specifications and all that. And when you're done with that, you get a passing grade, you get a certificate of completion. I mean, you can't ask for anything more. And we work along with you. If you get hung up anywhere on this process, you just reach

out through the messenger right on the training site and one of our experts will get back with you and help you out with what your problem may be.

Heidi Ellsworth:

That's awesome.

John Kenney:

I know certification you're ahead and right into.

Heidi Ellsworth:

Yup. So what is the certification?

John Kenney:

All right. So other industries do have certifications and recognition for your expertise in the industry. So when I was an estimator, I went out into the general estimating to do the same thing with certification. It was like, well, you'll learn footings and digging dirt out of a hole. And I'm like, that's not ... It's great. You learn the basics, but I'm not going to do that. I want to be recognized for something that's in my field.

So we broke it into two categories. We have professional roofing estimator certificate. And what that is is you're under five years in the industry, we feel that you want to be recognized for being an estimator, but honestly, under five years, it's impossible for us to say, you should go for a certification. That's pretty much industry standard regardless what industry you're in. It takes so long to learn it.

So if you'd go through these processes, you'll sign up for this and you got to show proof of knowledge and how to do an estimate. We have a whole system put together where you submit in an estimate, you submit in what you're doing. And if you've taken our courses, you've already taken the test. So if you pass the test on these courses, you don't to retake a test, because we already know your results.

If you haven't taken our courses, you can still do this. You can just sign up for this. And if you pass the test, you can move on to turning in your estimates. And our team has criteria built in of what we're looking for, for your accuracy and how you include and how you've organized. And if you pass all that, you get the recognition of being a PREC for under five years. And you get a certificate back telling you that, and we keep you registered on our books so that you can show your boss or your next employee or your future employee, if you're not even, say you're not really in the roofing industry, but you're an estimator and you want to get into the roofing side, take this. You can show, you get proficiency.

Then we got the roofing estimating certification program. You have to have five years. Your employer has to sign off that you have the experience that you, you've proven yourself. Same thing, there's an advanced test for this, but if you've gone through all of our basic and advance, you pass the test. You don't have to do it again, but you don't have to. You can come right in and do this.

Little more until, pass the test, you get proof from your employer that you got the five years experience. You go ahead and again, you have to show us that you can estimate. We will give you sets of plans on both the residential in a commercial building. You need to submit in an estimate on both. You got to pass all the criteria you pass that. Then the next step is you've got to put in a proposal, what your sales

proposal is. And we'll give you the criteria of what you have to do. And you're judged on quality, grammar, proficiency, including what you put in there.

There's five categories. We'll grade you through that if you pass those, then you get to do a presentation. We have that set up where it can either you can tape a presentation, we'll give you the criteria. You have to prove to us through this criteria. So say you and I were doing it, we're both in the same company, Heidi, and I'm taking this test. You're my owner and I'm the salesperson, I'm going to sell to you. So we would tape that and we'd send it in. And we'll give you the criteria of what you should be doing.

If you've accomplished all that and we grade you and you pass a grade, then you've passed that. So maybe you're not comfortable taping yourself. You want to do it by Zoom or if you want to come to our location, we can do that. Then you will present live to us or either over Zoom or live in our office here. And same thing, one of our professionals will grade you through that.

So if you get done with all that and your five years and everything, now you've passed, right? So what you get for that? We're going to give you a certificate, but you're also going to get a stamp, which looks like a corporate seal that's going to have certified professional estimator. You're going to a stamp with your number on it. And you're going to get a letter certifying you and you have to keep this up by taking continuing education courses, which you can do through us or you can do through any continuing education facility.

We'll give you the criteria and you are now a certified professional roofing estimator. Nowhere else can you get this. So I'm going to jump ahead and ask a question. I'm going to answer a question that's been asked of us. What national certifications do you have on us? We are in the process of doing that. We've already started. We will be nationally recognized accreditation for these certifications probably about another four or five months.

The reason why I say that is about a nine month process to get through we've already started it. We already know we'll get it because we've met all the criteria when we built these out. So you will see that coming. I just want to throw that out there.

Heidi Ellsworth:

Congratulations. That's really important. And so, okay one of the things I want to say back on for all the contractors who are on there, this is also for a roofing company, this is a great sales tool, and I'm not even sure. Now I'm trying to remember if we have that on the slides, but it's just such a great sales tool to talk to your building owners, to your homeowners that what they're getting an estimate is from a CPRE, that they have been certified and have put it all together. That's amazing.

John Kenney:

You are correct. And I'll tell you, so I got a roofer. Well, how's that going to work? Well, let me tell you what I would do, and this is how I would approach it. So I'm going in and I've submitted in my proposal, and now you come down to the owner's meeting, we got a nice million dollar job. Somebody's low by 15%. And I know that's impossible in the roofing industry. No, one's seen that. It spreads all over the place. You've done a great job, you've got to the table and one is going to say, "Well, why is your price here?"

So what do you normally say? "Oh, I have quality. I've been in business this many years." No. Now you can say, "You know what? I know we're right." "Why are you right?" "Because our estimators are trained and you've got this bid from my certified professional estimator. So I know our costs are right." Does my competition, are they certified professional roofing estimator? Probably not. I guarantee you you'll sell it because people want to feel confident in who they're buying from,

Heidi Ellsworth:

Especially when it comes to money and the estimating of the job. I mean, that is something. So I just want to remind everybody, if you have questions, if you have questions about the certification or about the training, how it works, or even about just the resources online, please put that in the chat.

I do want to say we've had a couple people, John. Don Halsinger says, "Hello." And Marty Stout also has said that your training is very good. The Cotney Training, he has sent a couple, a few of his team to your training and so thumbs up. So there's a referral from one of our RCS influencers. Thank you, Marty.

So if anybody else has questions, we're going to go through one more slide. And then we have a couple questions that have come in earlier, but we're going to be working through that. So let's talk about how to start using these resources. So shopcotney.com all of those things in there, and working with Cotney Consulting. John, just talk a little bit about this and what it takes to get started.

John Kenney:

So, first of all, if you have any questions, you can contact us direct. If you feel confident enough and you want to go delve into it, really check it out on your own, then come back with questions or purchase right away. Then you go right at the bottom, shopcotney.com, very easy to go.

Communications with our employees and we're all here, everybody's here, we're here to help. We'll get you to the right person, whether it is a consulting question. You call in, you have a legal question, it doesn't matter. There's no such thing as getting a wrong department here at Cotney. If you're working with our consulting team on something, it's a legal matter, we get you right over to the proper, the person to handle that for you. So that works all. But again, jump this in, call us, talk to us, we'll help you.

I want to stress because you have them on here. Again, talk to your employees. We're happy to talk to them too. I've had that. We had a company that put five of their estimators through it. We had a couple that were, I don't know if I really need this. I've got 20 years. They all took it, because I was able to sit with my team and we explained the benefits of it and they loved it. At the end, they loved it. When was the next one?

Take the advance, take the director. Leadership commitment, I can tell you that's the biggest thing at any company. It starts at the top, any training you're doing or any advancement, any kind of team effort you're going to do regardless, it all comes from leadership committee, commitment at the top. And if they know you're committed, they're going to be committed.

It's really easy. Contact us, go to visit shopcotney.com. I would like to throw a plug in there, anybody listening, anybody who sees replay, there is an RCS promo code. It's very simple, all capital letters, Roofers Coffee Shop and you get a 15% discount off of anything on the site, not just training, anything, anything you buy, you get 15% off. So it's a fantastic deal.

Heidi Ellsworth:

Thank you, John. That is so awesome. I have to tell you, we do the same thing. So for all of those who are out there, if you're in art club or if you're involved, there's also discounts for other things that we work back and forth with between Cotney and Roofers Coffee Shop, because there's so much good information and we need to continue to make that get that out there.

So we have a couple of questions. One that came in was John, advice on, if you have older estimators who maybe are a little skeptical on this, what would you say to them about why they should go ahead with certifications and refreshing their training and also continuing education?

John Kenney:

So, okay, you got a mix of estimators or actually this is great, because we're all working with a company currently that has some estimators that are 25, 30 years in the business, but their issue was that they're estimating all different ways. So maybe, and I'm saying this, maybe seriously once we realize that maybe the basic's not what they need, but I will tell you the director of estimating training, even if they're not going to run your estimating department, gets them into understanding why all estimators should be flowing in the same boat, rowing together.

So there's something there for that. I think the advance has it, but jumping to certification, for me, any estimator that's been doing this for a long period of time, why would you not want to be recognized? This is a great way to be recognized for what I consider one of the most valuable skills in any kind of company is putting the pieces together properly. Because if you can't do that right, selling it and doing it doesn't mean anything if you can't price it right.

So I think it's one of the most important and usually one of the largest overheads of any company is that estimating department. So you want to get that recognition, which will help you separate yourself. You're going to do the same thing. You're going out with a client. Well, you strike up the report with a client. Well, yeah, I'm certified. What do you mean you're certified? You explain it to them, yeah.

I passed my test, approve, I know my trade, I'm a craftsman, I'm right there. I'm one of the best in the industry. Wow. That's pretty cool. I didn't know that. And then on top of that continuing education, you can look at these modulars as continuing education. Yes, you may know all the basics because you've been doing a long time, but I will guarantee you we've had a 25 year veteran take the basic because I don't know if they were trying to prove to themselves that they didn't need it, but when they got done, they said, "You know what? I wish I had this 20 years ago. And I actually learned something that I forgot all about."

So that made it worth it. And this stuff is very inexpensive when you really look at it for training. We kept it that way. We want to get the industry better and that's what this is all about. So I would recommend it. I think it's great for anybody that's an old veteran out there, go for it. If you got any questions, call me. I'm definitely an old veteran. I'm happy to talk to you about it.

Heidi Ellsworth:

And one last question here and if any of the other questions come in, we'll get him to John, but one last question is, how do you incorporate the estimating training with your sales team? Is that something sales people should be taking?

John Kenney:

Yeah. So I will tell you it's not only something sales people should be taking. I think your operations, we actually have come out with a Spanish version of the estimating intermediate. We have an advance coming, because we're finding that crew leaders and foreman are also in need of this, because it helps them learn how to break a job out better. So I know I'm probably going to get some bullets coming at me with this one, but I'm going to make a statement that I learned years ago.

Estimators can sell, but salesmen should not estimate. Okay? The reason why that was said is because they're not properly trained. So yes, there is absolutely nothing wrong. And I encourage that your sales people go through the basics of understanding how a price is put together. And you're like, "Okay, why?" He or she's not going to price this, but when an estimator's giving them a bid, if you're set up in a company where somebody's pricing and then somebody's selling, if your salesperson knows what it took to put that bid together, they are more educated to go out to sell to that owner.

And I will tell you when owners buy roofing, they do like to buy from sales people who they feel have a knowledge of exactly what they're buying.

Heidi Ellsworth:

Yes.

John Kenney:

That's the easiest way of calling you out is somebody says a question on the bid and they don't know what the bid is. Right?

Heidi Ellsworth:

Yup.

John Kenney:

And I recommend it.

Heidi Ellsworth:

I think it goes right back to what we talked about earlier. This is also great for your sales and marketing. So talk about it. Talk about the certification, have your salespeople talk about it? Have your estimators talk about it? Put it in your materials, your brochures, your website, the whole nine yards, because it only will help you as you go along.

John, thank you. I can't believe it's been an hour. We're already at the end of our hour.

John Kenney:

I know. We covered a lot today.

Heidi Ellsworth:

It's crazy. But thank you so much. Thank you not only for being here today and all this great information, but thank you for what you're doing for the industry with bringing this training, actually put it in writing,

put it in courses, all this great experience that you have over the years. We don't have enough of that and so just, you're awesome. Thank you so much.

John Kenney:

My pleasure. There's not that I enjoy more working in the industry that's for sure.

Heidi Ellsworth:

That's true. Roofing. Yay. Great. Well, and thank you all for being on here. Thank you for listening today and being a part of our RLWs. I want to invite you to our next RLW, which will be January 5th. It's going to be brought to you by DaVinci Roofscapes and they're going to be talking about understanding composite roofing, really understanding how that works. I mean, it's such a beautiful product. It's so amazing.

So for you to help sell composite roofing to really make that, to upgrade your systems, this is the RLW, you don't want to miss this one. And then on January 26th, John is going to be back and we're going to be talking about project management training and more about the estimating and really just this overall so we can get even into this like why you should be training your employees and really what you talked about earlier, John, all the different areas in the company. That's to me-

John Kenney:

Yeah, and by then we'll be able to announce some more stuff that we got out. Like you said, project management, more workforce stuff and more other areas of the training.

Heidi Ellsworth:

I love it. So how you incorporate it across your whole company? That's what we're going to be talking about. Tomorrow, coffee conversations. Do not miss it. Trent Cotney is going to be, actually he is matching funds for four foundations, Chicago, Florida, Western states, and the roofing alliance all in one day. So this is your time to give back to the industry and learn about all these important foundations, what they're doing for scholarships, for research, for education, it's going to be amazing. 7:00 AM Pacific, 10:00 AM Eastern, please join us and please consider donating to these foundations tomorrow.

It's going to be a match fund from Cotney to every dollar you donate. It's going to be pretty amazing to certain limits, so read the information out there. And then finally, John and I just can't get enough each other. So we are going to be doing an affinity webinar on December 16th, affinity webinar is for anybody who's involved with the Roofers Coffee Shop with the art club, with the Cotney contractors and anybody else. It's open to everyone.

We're going to be talking about trade shows, how to work IRE. So this is going to be for contractors. How do you get the most out of a trade show? How do you get the most out of IRE? And we're going to talk about these we've seen together over the last 30 years in the industry. So wow, so many great things happening. We appreciate you all.

Thank you for being here. It's recorded. It will be on within the next 24 hours. We appreciate you and we want you all to have just a fantastic day. John, thank you once again.

John Kenney:

Thank you.

Heidi Ellsworth:

Thank you and thank you everybody for being on. We'll see you tomorrow morning on Coffee Conversations.

John Kenney:

Bye now.