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MODERATOR
Heidi J. Ellsworth
Partner
RoofersCoffeeShop



PANELIST
John Kenney
COO of Cotney, Attorneys & Consultants; CEO of
Cotney Consulting; CIO Cotney Capital Corporation

Heidi J. Ellsworth:

Welcome everyone to Roofers Coffee Shop, Read Listen Watch. Or as you know it better, RLW. My name is Heidi Ellsworth and we are so happy to have you all here today. This RLW is going to be pretty phenomenal. It is something that the industry needs, we are so proud to be bringing this information to all of you. It's all about estimating, and what's more important than training and certification for estimators? That is the professionalism of our industry. So we today have a full hour talking about how to train, how to certify and the importance of estimation in the roofing industry.

So before we get started and I introduce our very distinguished guest, I would like to do a little housekeeping. Please remember that this is being recorded. So you cannot only share it with all of your friends at work and in the industry, but if you want to you can go back and watch it again. We make it easy, and in fact, whether you want to watch it, or you want to listen to it through your podcast channels, or you want to read it through a transcript and articles, we're going to have that available for you across the board. That's why it's called Read Listen Watch.

So we will be taking all of your questions today, please use the chat box or the Q&A box and Megan Ellsworth, our award-winning producer in the background, will be answering and gathering all those questions so that we can answer them at the end of the show with our guest. So be sure to share this, enjoy, and so let's get to it. I want to introduce John Kenney with Cotney Consulting Group to talk about estimating today. John, welcome to the show!

John Kenney:

Heidi, thanks for having me again, I look forward to always being here. It's a great day to be talking about estimating training. I can't wait to get started.

Heidi J. Ellsworth:

I know. I mean John, you've done something. You and the team at Cotney have really done something that no one else has done. No one else has put out the type of estimating training and certification. So I really want to talk through that today and let everyone know. And just to give a little bit of background to everyone who's on this RLW today, John has decades of experience in the roofing industry. He has been with the largest commercial roofing contractors out there. He started very young in the family business, and he now leads training and consulting for Cotney Consulting Group. So you are going to hear wisdom and experience like no other. So let's get started, are you ready John?

John Kenney:

Absolutely. Ready to get going.

Heidi J. Ellsworth:

Okay. First let's just set the ... Oops. Excuse me. We went the wrong direction. Okay, hold on one second everyone. We're going to go backwards, and that'll just take two seconds. Here we go. Okay. So we're going to start out with John, and talking about the importance of estimating training. There are so many estimators out there who are highly skilled, experienced, professional. But there always room, plus this whole next generation coming in. So can you talk a little bit about that?

John Kenney:

Yeah. So a lot of times, especially in roofing and construction in general, but especially roofing, so much focus is put on either sales or put on the fact of your operations there's so much going on. A lot of times the estimating team gets, I hate to say it, but forgotten, right?

Heidi J. Ellsworth:

Yeah.

John Kenney:

And really your operation won't go anywhere unless you have the most accurate estimates possible. So the job of an estimator is to put the cost together that's going to take the company to perform a project. That's truly the job of an estimator. Not to sell, even though estimators sell, all the other things that go along with it. But you're depending on that person putting that number together to be very accurate, because without it everything else falls apart. This is your foundation.

So what I think has been lacking is that professionalism among estimating teams. And what I mean by that is not that people aren't professional, there's really been no unity of getting this all done so everybody has a way of doing it in accuracy. We forget a lot about accuracy when it comes to estimating, we're concentrating on getting the job in the door, a lot of other things. But like I said, that most important is pricing it. And marketing, when you can market your company that you can bring a job in, you got the best of everything else, the last thing you want to do is go to any owner and say, "Oh, I'm sorry. We made a mistake." So I've had that in real life experience, where I had to go in front of an owner and realize 10 minutes before a meeting to go sign a contract, my team found out that they made an estimating mistake. And if we signed that contract, we were going to lose \$100,000 right off the bat.

So what do you do in that instance? So that's why I'm saying, that's why all this is so, so important. Because what I did was I walked in, realized it, came clean with the owner. We didn't get the job, thank goodness, but the relationship was saved. The relationship for future work was saved. So again, if I would've had all this done in the beginning, proper accuracy brought up, we would've had not a problem. And you set yourself apart from your business, right? From other businesses. Excuse me on that one, I kind of stuttered on that word there a bit. But anyways, what I mean by that is you want to always be the best and the most professional, and that starts with estimating

Heidi J. Ellsworth:

John, I really think when you talk about estimators too, the speed of light is how we all feel that business is going today, right? We are going so fast. And so many, I think estimators in the past have been trained ... Mentored, right? Trained by older estimators and it comes down, and there's not these processes put in place. Now there's a lot of places that have amazing processes, but overall in the industry ... So really looking at that, maybe you can talk just a little bit along that lines of the history of estimating training. As you've come up through industry, how have estimators been trained?

John Kenney:

Well, it is a fantastic question. So let's jump back to the early days in my career. So the way originally you were trained in estimating is, "Here you go, here's a set of plans, or go take this job off. You know enough about roofing now you've been putting a roof down, put the price together." Is that's the way it was. You came in, it wasn't so much of a professional estimating, you went in and put it. Very dangerous, right?

You're going to pick up bad habits, you may not know what to do, no one works with you. So really as that's progressed, and as I come up through my career, and that will get into how we created these programs.

But really of what happen is you learn your trade, you become very good at it, and then you either move up to what we call the senior estimator, right? Or you may be the chief estimator if it's a multi department. So part of your job is to groom the new people coming in. And I will say one of the biggest problems in the industry is someone can be experienced as an estimator, come into a new company, but every company estimates a little bit different so there's still that training curve, right? But it's the amount of hours that it takes. It takes so long for your senior estimator or your chief estimator to train the group of estimators coming up, because it takes a long time. Because you A, still have to do your own job, you have other duties to do, and you've got to hit your own goals.

So a lot gets lost in there, and everybody does it a little bit different and not everybody's a great teacher. Let's face it, not every single person can pass down the knowledge to somebody else. So that's why we came up with this training, but that's the way it was. You'd sit, you learn, trial and error. And a lot of estimators then don't get any kind of background in project management. So what happens with that is a lot of companies, and I've worked in it myself, where you're not only the estimator, you're also the project manager. So that's a whole other skill set.

And then I've worked in companies where a project manager doesn't have any estimating skills, so they're unable to break jobs down upon those areas. So again, this all kicks in. A lot of learning, a lot of differentiation, a lot of time taking. And like I said, you got to hear, who has been traditionally trained? A lot of times if you came up through the ranks, and the ones that excelled you come off the roof, you come in and estimate. That's the way it was done. Now, a little bit different. I don't see as much of that, but you still have to ... Even if you're going to college and you get a degree in any kind of construction management. Estimating, even if you've taken some basics in college on estimating, it's a whole new world. This is a different world. You need a lot more training.

Heidi J. Ellsworth:

Well, and I think too, the generations. When we look at what we're doing, the estimators who are really at the top of their game didn't even come into estimating using technology. It was pencils and blueprints, and very non-technology. Now today, all of these young people who are coming in have been, hopefully, have seen things like Estimating Edge or some of the programs that are out there. And that is making a big difference too. How can someone who's never really used it that much start training? So there needs to be some proven methods in between. And I think that's really, as you're looking at it, I would love for you to go with that thought, but why train? Because I know right now there's people out there listening, John who are saying, "I know how to estimate. I don't need training. I don't need to be certified. So why? Why should you be training the whole team?"

John Kenney:

Well first of all, I want to answer that question of I've been estimating, or I've been doing anything in my job, for many years. "I don't require any training. I don't require certification. I don't need to learn anymore." I don't know how anyone can make that statement. I definitely am a baby boomer and have absolutely the 45 plus years experience, and I still continue to learn today and still look for better ways of doing things. I never depend ... I take my past as my experience level, and I build upon that. So I will just caution any one out there who has been ... Even if you say "I've been estimating for 25 years, I don't

need any of this." Not true. There's things in there you're going to want to be refreshed on, there's things in there you're going to want to use. And most importantly if you're that person that is responsible for training, why would you want to take all your time to do it?

That's what we've done. I've taken all ... So if you manually train, it can take weeks and weeks to get it done, right? These have been compacted into hours, the way it should be. Because it's concentrated and it's a learning method. So there's concepts in estimating, this gets you down to the basics. You still need to know formulas. So let's jump into what you said about the estimating softwares. Agree, fantastic tool. But if you go to any manufactured software, they're going to tell you that it is an estimating tool, it is not an estimator. Just because it's a tool does not mean a person that is not properly trained on the concepts of estimating will be able to put a proper estimate together. I don't care if you have modules in there, and you say you can. If you don't understand why you're getting from point A to point B, you're not going to know if there's a mistake in error or something's missing.

So that's another reason why we developed this, working with the software companies like the Edge. That's what they said to me, we have a lot of people that come down from roofing companies and the other fields that they deal with, that have no idea how to estimate. But the companies feel that we're going to train them on the Edge and they're going to go back and be estimators. Not the truth. The other one is estimating in sales. I always say this, and I'm going to get a lot of heat from people out there I know, but I'm going to say it again. Estimators can sell, salesmen should never estimate. And everybody's going to go, "Oh!" But I'm going to tell you why. As an estimator, you will need to sell. And we have skills that we teach you how to properly get with your clients and do it. If you're a salesperson, you need to learn how to estimate. Because if not, you're not going to know if your price is right even if someone else is giving it to you, and it will affect your ability to close a sale.

So these are the important steps. And I mean, employee retention ... And everybody was like, "Well, what's the cost of training? I train someone, they're going to leave and go to my competition. They're going to leave and do this." I will tell you that most companies retain their employees with training, and I will leave it at this note. If that person leaves you for another opportunity, so be it. You've made a better person in the industry, which will make your competition better, which in turn will not be a low ball competitor. So there's a lot of advantages to training and a payoff in the long run. Recruitment, fantastic way you bring somebody in. You say, "Hey, I can get you from point B, you look like you have the acclimation to become an estimator. Let's get you in the training program. We have all these training set up, you're going to be able to learn how to estimate. We want to get you up here, and even we can teach how become a director or chief estimator." it's going to pay off in the long run for sure.

Heidi J. Ellsworth:

Well, in that recruitment we're hearing this all the time. This next generation is coming in, they want training, they want mentorship, they want to be able to show their skills and what's happening. So recruitment and being able to provide training that has that method, that is going to be the same throughout your whole company, I think is a huge benefit for recruitment. And what people are looking for, right?

John Kenney:

Absolutely. Also too, you got to remember it's not just to be a pure estimator. We've developed this, you can have your foreman take the intermediate course. They're going to learn how to set up a job better, they're going to understand how to figure materials out. We even have it available in Spanish so that

they can take it in their native language if be. So even if you're not going to be a career to be a pure estimator, there's so much advantage. We have people taking these courses that are administrative assistants in companies, because they get to learn all about it. So there's more than just being an estimator to this, for sure.

Heidi J. Ellsworth:

I love it. Well, let's get to it. Let's talk about that a little bit.

John Kenney:

All right.

Heidi J. Ellsworth:

What are the key elements in training? As you've been developing these programs.

John Kenney:

So you still have, in my opinion, and anybody I've talked to out there when we got in this, the big thing that's really missing is learning the core, right? So that's what our first module is. Even though we say it's beginner to intermediate, and that to where we've had some people say, "Well, I've been estimating for a long time." We have one company, and I'll get back to this, but we have one company that had four or five estimators all estimating a different way. They had them take this, and the important thing after they took this, they all realized, "Hey, we teach you how to lay the estimates out, how to do different things a certain way." They became in sync. So as this department started to develop estimates, yes they knew how to estimate, but they learned things they didn't know before on how to be all be beyond the same ... Basically rowing in the same direction.

So if you have no idea what's going on, which is why we developed it this way, we're going to teach you the different types of roofs. This will cover both steep slope and low slope. You will learn about waterproofing, damp proofing. All different types of systems, we cover metal. So you're going to get the basics through this, that when you're done, you're going to be able to put an estimate together.

So we've got a lot of this feedback from listening to our customers, listening to people's issues of why they could not get at their teams, and then what they needed. And the other thing you're going to get is understanding products and systems. We go through that. There's a whole couple modules in here on terms and what they are, what exactly they are. We show the videos where you learn where a fascia is and all these different things, which comes in handy for people trying to learn a lot about the roofing industry at the same time coming up, and learn about the different systems. So all the key elements you need, blueprint reading, basic general math, all the way up to the advancement of the difference between the division seven sections. Fantastic. Like I say, we cover everything from damp proofing all the way to specialty skylights. So it's all there.

Heidi J. Ellsworth:

Wow. And I want to go back real quick. This beginners, what you're talking about, you're saying that people from across the company are taking it, not just estimators. And it's really starting to bring a light to maybe things that got missed in the initial training.

John Kenney:

Absolutely. I will tell you, we have a lot of project managers as well taking this. Because a lot of times I told you, project managers, they're not estimators. But they're learning from this what their estimators should be doing, so that when they're getting the information from their team, they're well aware. Or they're learning in here how to break down better change orders. They're learning those skills. And again, we have a lot. We have estimators, we've had admin positions, we've even had a one company sent through their front desk people, their customer service people to do it as well. Because you learn so much about how to put a roof together and what the components are that it just makes you a better person within the company.

Heidi J. Ellsworth:

Yeah. And I really love that when you talked about listening to the customer, because even if you're listening, if you don't understand what you're listening for, you're not going to get it. And so that is ... What are you hearing back from your people who have been taking this class about that ability to now translate with their customers?

John Kenney:

And I know everybody out there is like, "Well, everybody says that." We've gotten all good feedback, right? Which from our clients that have taken it and they've promoted it out to other people, and they've even gotten in for more people in their companies. But what they're hearing is when they're getting their teams and the different people to take this is, they're getting more uniform and everybody's working and understanding it. That's the whole important thing you now have ... Everyone knows what it takes ...

What are we really doing at the end? I'm jumping ahead, but what are we really doing in our business? We're putting a root roof in place. That's basically what we do as a roofer. There's a lot of other things that we do, but we're giving a customer the final thing, which is a roof. Now you take this, but how many people in your company understand what it takes to be able to put that price together? So even your sales teams or your customer service, when a client calls up now know, "Hey, well I know what it takes. You got to tear the roof off. This is here, you got blueprints, you got to measure the roof. Here's the components." They understand expansion joints, now everything is covered in there and all the components. So it's a great education regardless where you're at within the level of the company.

Heidi J. Ellsworth:

Yeah. I think that's great. That's great. In fact, I'm thinking John, all the fo at Roofers Coffee Shop are going to need to take this.

John Kenney:

I agree.

Heidi J. Ellsworth:

I love it. I love it. Okay. So let's talk about the more experienced, right? We have a lot of senior estimators out there. I mean, just amazing professionals. Why should they be taking this training? And I know you said sometimes they jump the courses, but sometimes they're taking them from the very beginning, all the way through.

John Kenney:

Right. So again, this a little bit later, but we like to break them down is the first course we call hard skills. The reason I want to call it hard skills is that covers everything, you're going to put an estimate together. Like I said, I've had people with a lot of experiences said, "Boy, I forgot about that. I forgot about the formula for figuring this out, or all that." It's all there. You get a whole lot of handouts to get in, you're taking a test at the end that proves you're ... You have to pass this test to get it.

So then we have we call soft skills, right? So a lot of our more advanced estimators are taking that right off the bat. And I've had them after they take that, go back to see what was in the beginner. So either way they're flip flopping. But on the soft skills one, what you're learning there is we are going to cover the technologies that are out there, how to use them, best practices to setting your estimates up. We're going to teach you about change order pricing, we're going to teach you how to work with your operations team, we're going to teach how to put a proper proposal together. How to work with the client, how to get with the client and selling it, how to go back and do a post job review, which a lot of companies call them postmortems. No one wants to do it, because everybody's afraid to go back and look at it. It's always a blame game. We teach you why it's not a blame game and why, as an estimator to work with your teams and how to get this information so that you become better.

We all can become better. If we don't learn from what we're doing and what's happening out there, how do you improve it? I can sit behind and estimate all day long and know it should take X to do it. But if my company's crews can't produce it, what I say it should be done, none of it matters. So you have to get that feedback to be able to make those adjustments. So we take the pain out of that by doing it, and you're adding tools to your tool belt. And each one of these comes with a test and a passing. It's great for your knowledge and your abilities.

Heidi J. Ellsworth:

And I know that you are partnering with technology out there. Companies like Java or Imagine Technologies or Estimating Edge. You are working through those so that ... People who maybe haven't been exposed to it because they've been an estimator, and they've never had the chance for that continuing education. Now they can get it.

John Kenney:

Exactly. That's why we're doing exactly the way you said. We're partnering with all these different companies. A, help train up the people that are using theirs, and companies who haven't yet gotten ... There's still companies out there using Excel spreadsheets, and even some pad and pencil. But you're learning there's other ways of doing it to be more efficient. That's the key. Accuracy and efficiency today.

Heidi J. Ellsworth:

Right. And I also, just going back to what we talked about just a few minutes ago. But when you say, why train senior estimators. Is if you're training all of your new employees, new estimators, or even intermediate estimators, and your senior estimators don't know what they're learning. Again, you have that problem on the team and how they all should be working in sync.

John Kenney:

That's what it's about. It's about most companies have anywhere from one to five or more estimators, depending on locations. Some companies that are very large may even have an estimating pool where they're working at a general location, or you have multiple teams working between sales and estimating. Whatever it is, it's like anything else in life, or anything else in our business. If you're not all rowing in the same direction and you don't know what your partner's doing, it's not going to be as successful. Because you have the ability to pass these things off, to be able to know "Jack over here is doing it this way. Sally now is on the same path. We're all going in the same direction." It makes a big difference.

And the end result is you want to be able ... This is what a lot of companies don't realize. It is so important that your estimating team is doing things exactly the same way, so that when you're passing this off in these handoff meetings, the operations teams, they know what they're getting and they don't have to spend their time trying to figure out how the estimator put the bid together. So if it's all laid out exactly the way it should be, you're going to make more money. Your operation team's happier, your foreman, your crew leaders in the field are going to be happier. And you're ultimately going to have a happier client.

Heidi J. Ellsworth:

[inaudible 00:24:29]. I usually save the questions for the end, but I do have to point out we just had a comment, John. And it was from Michelle Boykin with Rackley Roofing. And she said, "COOs take this course too." So it really does show that for me, whether you're the COO or the CFO, understanding how all this estimating is happening, how it's going through the whole process and the project management, is critical.

John Kenney:

Yeah. And I know when I was coming up and learning estimating, I'd hear from a lot of places. "Ah, estimating is easy. All you do is put prices down." No, it's not easy. It is an extremely complicated, difficult job. And you as a company owner or manager, or somebody involved in the financial responsibility for your company, you have to realize that your entire success in your future lies and starts with your estimating department. If that is not right, nothing else will be right. No matter what you do.

Heidi J. Ellsworth:

So true. So true. Okay. We have the training, and we're trying to get the whole company, the whole team for sure, in training. Now, I love this part. What you've put together is certification so that people can actually show that they've done this, and that they have retained the knowledge. Can you talk about this certification program?

John Kenney:

Yeah. So I've always felt if I was an estimator and I'm good at my trade, I want to brag about it. We'll get into the ... So first of all, it's bragging rights. So what we set up here is you don't have to take any of our training courses first of all, to take these certifications. You will have to show proof of knowledge. So if you take our courses and you pass those tests, you don't have to take a preliminary test to get into this, right? Because you've already proved your knowledge. But if you feel you've been doing this long enough and you're a skilled estimator and you want to just go for your certification, you can go ahead and take a test, prove your industry knowledge, and you can move on.

John Kenney:

So what we've done with this is set it up, you test your knowledge. You're going to be tested on how you put a proposal together, you're going to show us your head, we're going to give you guidelines. You're going to put a couple estimates together, show us how you got to it, we have a grading system on that. You're going to have to actually show us how you would present this to a client, we do an actual oral presentation to us back. We have a grading system broke down into multiple categories. And when you pass all that, you're going to become a certified professional roofing estimator. Nowhere else in the industry can you get that. So you're going to be able to get your own seal, just like you see a stamp seal, and you're going to get a stamp and you're going to get a registration number, and you're going to get a letter explaining what you did along with a certificate of certification. Why would you not be proud of that? Right?

So let's say you're a company, why would you want your estimators to do this? Well, your recruitment number one. You got your professional team, they prove they're professional. Your marketing, going out and saying, "Hey you deal with us, you know you're getting the right product because we are certified professional estimators putting them together." Right? So there again, how I come up with this is you go out ... And I've talked to a couple building owners and I talk to consultants who are very big on pushing this in a direction of seeing roofers get their estimator certified. So if you go out on a building owner and you're not the low bidder, which is what we all don't want to be, we want to get our price and go sell it on our professionalism.

And the owner says, "Well, wait a minute. I got price A which is 10% lower than yours." First reaction is you try to explain, you'd do a better job. You'd do all this. They'd say, "Why would I pay you more? Besides all your [inaudible 00:28:18]." And you say, "You know why? Because we don't know if their estimate is correct. The owner's going to be "Well, what do you mean you don't know they're estimate's correct?" He says, "Well, we know ours is accurate because look, it was prepared by Jack over here. He is a certified professional estimator, he's proved to the industry has the skills, the ability, and what it takes to put this estimate together. So we stand behind our estimator. We know our price is right. Now, here's the other attributes that we bring in into this job. We're a good company, we've been around a hundred years ... " All those things.

But that owner's going to be like ... You go to get your car work done, do you want a certified mechanic working on it or somebody behind a barn. Right? So that's what I'm saying. These are the things that come in very much value. There's a lot of bang for the buck there.

Heidi J. Ellsworth:

It's great marketing. I mean, it's great marketing. And I would think that as you get these certifications with your estimating team, you would want to make sure that your sales team was aware of that, that it was in all your marketing material, that you are really using this to differentiate your company, and your bids and your estimates.

John Kenney:

Yeah. So just to add one thing in. What we did to make sure you could differentiate it, is you have to have ... To get certification, you have to have your employer sign off that you have five years experience estimating. If you have less than five years, we do have a certificate professional program. And that's for ... When I say the newbies, so don't lose heart if you've only been estimating for a year, or you just took both our courses for the first time. There's still a pathway to get you up into that professionalism.

There's nothing wrong with saying, "Hey, I have a certificate of professional estimator, but I don't have five years in. Now, I got five years, let's to go get certified." So we gave that pathway for the career.

Heidi J. Ellsworth:

I love it. And as you really look at that, let's talk a little bit about those different levels. So training through certification, what you were just talking about, beginner to intermediate senior testing. Go through that one more time John, just so people know how they would take the steps with their estimating teams.

John Kenney:

Sure. So like I said, beginner and intermediate. If you absolutely just want to say, "Hey ... " Let's look at it this way. You're a company, you want to see who can maybe become your next estimator. You just want to make them a better teammate, learning all the aspect, beginner programs, perfect. If you've been fooling around a little bit with estimating or you get hired in, that's still the one. That's why it's beginner intermediate, because you don't have to know anything or you can know a lot, and you're still going to get a lot out of it. That's why we call that the hard skills. And then the soft skills is going to cover ... It's not going to focus on how to put the estimate together, it's going to focus on all the other steps involved. Proposals, change orders, how to do a proper RFI, put submittal packages together, how you do it, how to understand specifications better, all the things that come into be in that next level. That's why that's more of a senior. That's to get you up above where you need to be.

And then in between, before we get to the testing certification, we have a director of estimating training. So where that comes in is you're going to learn how to run your own estimating department. Now, I'm going to jump back to Michelle about the COO. We have a lot of people that are in management positions that they don't have a director or chief estimator, they're filling that role. You may be a vice president in a company, you could be the owner of a company, but you're reviewing the estimates before they go out. Well, this is a great course even for you being in that position. Because it's going to teach you how to properly run your meetings, how to run your teams, what to look for setting goals.

And if you're new, [inaudible 00:32:03] would happen if you're new going into this role in management, we teach you about how to do your interviews if you're hiring, how to do your reviews, how to discipline, how to praise, all the things that come into how to learn to be a manager. Because at this step, you already should have the other skills down, or if you've taken the other courses. But who really knows the first time you're thrown into a management position? How do I become a manager? We're going to teach you that in this course.

Heidi J. Ellsworth:

Wow. So that ... Yeah.

John Kenney:

No, it's perfect-

Heidi J. Ellsworth:

[crosstalk 00:32:38] John.

John Kenney:

No, no. I was saying. So those are those levels, and then of course we just went into the testing for certification we covered. So remember, there's all these levels plus if you're new, one to five, we've got a place for you so you can show professionalism, and then five and above. So if I always consider myself an old salty dog in the world, so I would go "All right." And take the certification and go for it, show it off. You deserve to.

Heidi J. Ellsworth:

That's excellent. And then that testing is through each level-

John Kenney:

Yes.

Heidi J. Ellsworth:

... so they're testing constantly? Yeah. So you can really track your employees too, to understand where they're base of knowledge is.

John Kenney:

Right. So how it works, to get a little deep dive into that. Every one of these, when you take ... Depending on the course, it may have nine modules, it may have 15. It depends on the course. But after each one of them, you will get a review quiz. It'll have three to five questions to go over what you just learned. You'll answer them, if you don't get them right, you got to take ... Get it until you get right. Then when you get to the end, anywhere from an 80 to a 100 question quiz, depending on the program, and you've got to get a passing grade. So you get two opportunities to take it. We haven't had anyone fail on the second one yet. Some people do fail on the first one, but then they understand what they didn't do correctly. And they go back to that modular inside their unit, re watch it, relearn it, take their notes and you're done. When you're done, you get either certified or certification, whatever one you're taking.

Heidi J. Ellsworth:

That's excellent. That's great. So, okay. We've got this team and you've decided you're going to do this with your company. What are some of your recommendations on preparing your team for this? Really talking about going through with this training and certification for estimating.

John Kenney:

So the great thing about this, your workspace, you don't need anything special, right? This is set up, you can do it online. We have a lot of folks who do it either at night or they do it on a weekend. You do not have ... Some of these courses can be anywhere from 8 to 12 hours, depending on the course. You have time, 30 to 60 days. They're broken out into 20 minute learning sections so that you don't have to sit and do them all at one time. And you can also go back and re watch whatever you need to learn. So the workspace is, you need a computer. That's really all you need. In understanding the return on investment on this, is that you're going to get a large return on investment.

And again, you'll get the [inaudible 00:35:16] again, we've priced this so reasonably, because our goal was to get this training out there. If I were to come into your company and do this one on one, it would be 10 to 15 times the amount of money you're going to spend on this training. And if you were to do it

inside your company, just remember how many hours it's going to take you. You will never do it in 12 hours. I know it used to take me a month or more to properly get everything over to an estimator. And even then I wasn't comfortable with what I put over to this person, because I had to worry about getting my own jobs done, I had to worry about other things in the company. You just don't have the time to do it. That's where this has the advantage to it.

So your return on investment is huge. And commit to it. We haven't had anybody that hasn't finished a course, I will tell you that. Everyone who starts it, we have some slow starters because we watch the progress. And if we get somebody that hasn't moved along, we reach out with our team to make sure they don't have any questions, everything's working correctly. And a lot of them are saying, "Yep, I'm just moving along at my own pace." And then they get through it. So we've had a hundred percent commitment. We haven't had anyone purchase this that has not completed it.

Heidi J. Ellsworth:

Wow. That is cool. But as you're looking at this, as they're prepping their team and getting ready, how important is it to get some advocates for this program on the estimating team, or in the company?

John Kenney:

Absolutely. It's like anything else. Whether it is launching a new initiative, or whatever you're doing in your company, you have to have buy-in. And I think the best part of doing anything with training is get your group together, explain the training. That this is not because we don't feel you're qualified, this is not because we don't think you know what you're doing, we want to get everybody on the same page. We want everybody, "This is our mission. We want you to get refreshed or to learn new. But most importantly ... " So this is how you go to your senior teams, right?

We want you to understand what we're bringing the new recruits in. And you know what? You're going to know what they're learning, so when they come to you with questions you're already going to know what they're asking questions on. Now, the importance to that, Jack and Joe and Sally, we're going to be able to allow you to do what you do best. Put our prices together, you're the killers in the company, you're closing the deals, you're the most accurate estimators we've ever seen. We're not going to bog you down with training the new recruits coming in, that's why we're doing this. And I guarantee you, you're going to get a lot of buy-in. And if you do it that way, that'll work.

Heidi J. Ellsworth:

You need people who are excited about it. And they're committed and passionate, because otherwise they're just like, "Oh, it's another thing they're asking me to do." And you need to get that buy-in. And I love that, how you talk about the seniors, understanding the juniors, and everybody working together to create this company. It's excellent. What are you hearing back from some of the folks who have taken this? Who are at the higher senior level, and what are their thoughts?

John Kenney:

Well, I had somebody that took this that I've known in the industry. And when they got done with it, and they're my age so they've been around a long time too. They said, "John, I got to say two things about this. One is I learned things that I wish I would've known when I first started, so I wouldn't have made the errors to learn them again, so this is why it was worth me taking. And the other thing is ... " They were like, "Wow, there's things in there that I knew I knew, but I forgot I wasn't doing anymore, so now I

can be more efficient. And the third ... " Well actually he said three things. "The third thing was, you know what? I am nowhere near advanced using this technology and didn't understand it. Now I can embrace it, because you explained why it is a tool and will help me do what I do best."

So the only thing I want to add Heidi, is I used to hate online training and all these things myself. Okay? I didn't like taking courses that had information that was not pertinent to what I was doing. So what I want everybody to understand out there, this is about roofing. For you roofers that are out there, this is cutting through the chase. I'm not going to teach you things that you don't need to know, we really drill down on each one of these modules to get it. So when you're done, you can go right to work with what you learned.

Heidi J. Ellsworth:

Yeah. And you and your team who have put this together are actually estimators who have been doing it, so understand. And I think that's really important too. Okay, so I want to go back and visit a little bit about what we talked about at the beginning. And that is the importance of this training to the marketing program, the differentiation of a roofing company. Talk a little bit about once the team is trained and they have their stamps, how should they be using this in their marketing program?

John Kenney:

The reason why ... So I had a lot of people, "Why are we getting stamps?" So if you look at it is, everyone's gotten something notarized, right? So you're going to get an official hard seal, you're your estimator's going to have a stamp where he signs, or he or she, right? So I would never put an estimate out that my certified estimator didn't put their name on it. How much better ...

And I will tell you just to drop back, there are some municipalities out there, and of course I don't know anywhere else, you can get certified a roofing estimator, that your government agencies are requiring on larger projects that the bids are actually put together or reviewed by somebody who has a certification in estimating. And in our industry, I believe we're the only one ... I know we're the only one doing it. So where do you go? So that's why we did this. So you want to brag about it. You're going to separate yourself from your entire competition, and everyone wants to buy from the best. That's the key to this, you are now putting yourself as the best. You've invested time in your team, you have only professionals, and now you get to prove it to your clientele base that you are the best.

Heidi J. Ellsworth:

Yeah. Yeah. And I see this all the time in the roofing industry, especially, is that roofing companies tend to be a bit humble, right? They don't tell people what they're doing. They don't tell people when they're doing philanthropy, they don't tell them when they're doing this kind of training. And so really looking at taking this certification and really highlighting the estimators with the certification on their website, showing their pictures, talking about it, is so important.

John Kenney:

Absolutely. And I can tell you if you take these trainings and you get the certification, I will guarantee you that when you start to go to meetings with clients as a company, as an individual estimator, and you can sit with them and show them your qualifications and you get to put these initials next to your name. So certified professional roofing estimator, those initials go next to your name. So what's a greater start than have it on your signature on your email, or your business card, your digital signature. Whatever

you're using today, someone's going to say, "Hey, what is that? What is your qualification?" And you get to explain it. So it's a great branding tool. It absolutely is.

Heidi J. Ellsworth:

It's really good. And for everyone out there, website, brochures, business cards, everything that John just talked about. And I think explaining it within your own company so that your sales team understand it, people that are answering the phone understand it. So I really believe in brand ambassadors. And so if your company, if your employees, aren't talking about it to their customers or to the community as a whole, it's just going to be lost.

John Kenney:

I'll make a deal. Everybody out there, you start to get your team certified, I'll give you a free session within your company to tell your marketing department and your teams how to go out and promote this. Not a problem with that. I'm telling you, it's a great tool.

Heidi J. Ellsworth:

Yeah. Brand, get your employees behind it, they'll talk it up and it will continue to grow throughout all of your customers. Okay. So let's talk a little bit about getting started. So John, hopefully everybody who's listening to this is like, "Yes. Estimating, training and certification. This sounds great. But what do I do now?"

John Kenney:

Pretty easy. I mean, you can get ahold of us any way you want, we're happy to walk you through it. Our team will get ahold of you, talk to anybody in your company that needs to learn about it. Or you can go very simply to shopcotney.com, go to the training section, all this is laid out there. You go to our website underneath training.cottoncl.com, go to training, you can read our brochures. It's all there. Again, it's simple, it's painless. You buy it, you get a code, you sign up. It's all automatic. It's there for you. It's not hard at all. Just so some companies understand, we've had some of the managers and the companies purchase the software but they didn't want to take it themselves. It was for somebody else. We have no problem with you reaching back out, we'll transfer the emails to whoever you want trained if that's the way you want to do it. We're here for you. We make this a painless, simple process to get you started.

Heidi J. Ellsworth:

And then talk to just a little bit about shopcotney.com, because not everybody may understand how easy that is. They just go shopcotney.com? Is it like Amazon? What is it?

John Kenney:

Yeah. It's a shop count. Go to shopcotney.com, it's broken down. There's everything on there from our training programs, you'll find legal documents on there, you'll find non-legal documents on there, there's contracts. You name it.,It's on that site. We've made it so the entire industry can find everything that they need. And I will recommend go back every other week or week, go back because we're constantly adding new stuff. I mean, I know we're talking about estimating on here today, but we've already added project management training. That just launched last week. So that's there.

Since your group's here listening today Heidi, we're going to launch it in IRE. We've just finished superintendent's training, that's going to launch the week after IRE. So we have every you position and we're going to continue to grow. So if you're there from the company, we're going to have you covered, that's the whole purpose of this. So keep checking back and keep going there, you're going to find what you need. If you don't find it, reach out. I will give you an example. The HVAC industry saw the roofing training. They're like, "Well, can you write one up for the HVAC industry?" We're working on that now. So put your request in. If there's value to it, we'll absolutely do it for you.

Heidi J. Ellsworth:

Right. And how you bring all these different groups together, too. Project managers, supervisors, estimators, sales, all of that. Once they are functioning together as a team with processes and understanding what each other's doing, it just opens so many doors.

John Kenney:

Absolutely. And you know, lean upon us. If you have an idea, you want something customized for your company, call us. We're happy to work with you.

Heidi J. Ellsworth:

Yeah. So we've had a couple of questions come in, and so I want to make sure we get to those. So I'm going to bring those up here real quick. I would really ask everybody out there if you have question type them in so we can get to them either in the chat or in the Q&A, either one will work. Okay, John. One of our questions we have is we were talking a lot about the estimators who are out there who have already taken this, especially the senior estimators. Would it be possible to do referrals? Whereas in someone who's maybe listening right now wants to have one of their estimators ask an estimator who's already taken it, how they liked it, hearing straight forward. Is that possible?

John Kenney:

Yeah, absolutely. We do have some of the people have taken it have done what we call the Cotney ACEs Program where we've interviewed them. But yeah, reach out. We're happy to give you a list of people have taken it. You reach out solo, we won't be involved. You get your questions out and your opinions, just reach out to our team. We're happy to give you some of those leads to go chase down. Absolutely.

Heidi J. Ellsworth:

And that also might help as owners out there, if you can get one of your estimators talking to another estimator, then you get that advocate in your business because they've heard it from another estimator. So sometimes those are the kind of things that can really help too.

John Kenney:

Yep. If you're an owner, you can reach out to us if you want to buy multiple units, or you're not sure. I'm always happy to chat as well.

Heidi J. Ellsworth:

Yeah, always. We know that. That's always a given. So from Andy Centaro, thank you Andy, he has a curious question. Do you think having an estimator also act as a PM on the same project is a good idea, or is that a conflict of interest?

John Kenney:

No, that's a great question Andy. I'm straight up front with you, I've done it myself. Every company has a different model. There's nothing provided, and I'm going to put it at this, provided the person that's acting as the estimator and a project manager actually understands both roles. Having an estimator act as a project manager that does not understand what it means to be a project manager, that would probably be a problem. And I've run into that and seen that.

So I would recommend that if you're going to do that ... And we do cover some of that in our modules as well, that there are a lot of companies out there that run the dual profiles of both being an estimator and project manager. So I really don't see a problem with it provided that you've trained whoever is on your team to do both roles, and that they understand where they go from being an estimator to where they go to be a project manager. Like I said, for 10 years at one company in my career, that's what I did. I bid to work, got to work, and I ran to work with our field crews. So it happens. I mean, everybody has a model that works for them.

Heidi J. Ellsworth:

That's great. That's great. Andy says, thank you.

John Kenney:

You're welcome.

Heidi J. Ellsworth:

We also just got a note from George Wadding, who I actually worked with his son, Steve Wadding, when I was at Malarkey. So hello, George. And he just wanted to say basically in agreement John, that he had too many years of dealing with the frustration of incomplete and conflicting construction documents. So he and Steve have worked on a book, 59 Bidding Pitfalls and Issues. And he's going to send you a complimentary copy and us too. Thank you, George, we'll be in touch. That's awesome. And I think it's this ... I really want to point out with what you've done at Cotney on this estimating training, now project management and supervisors. You've really opened a conversation, which I love. With George, people talking about, "Yeah, this has been a frustration." And now people are addressing it.

John Kenney:

Absolutely. I look forward to it.

Heidi J. Ellsworth:

And we also in the chat, just so everybody knows, Whitney put on there the YouTube link for, if you want to hear from us, from other people who have taken this, you can go in and see some of those testimonials too. So whether you want to talk to somebody in person or watch it online, it's all there. And I had one more question and that just came in. And that was any suggestions on some of the more commercial roofing contractors out there who are working with BOMA, or some of those building owner associations that are out. How do you really start promoting the certification to them and through maybe some of those organizations?

John Kenney:

Well let, let's go back to where the world was before COVID. You had live meetings, you networked, so that's a great place to get out and do it. I know that's where I started to come up with these ideas. A few years back when I was still in the industry, you'd go out and you'd listen to other companies and other trades be able to promote the professionalism, because they had these certifications and all that. And you're sitting there as a roofer and saying, "Oh man, I wish we had this." Right? Because you could join that club and say, "Hey, this is why we're better than somebody who doesn't take it." But I mean, today you still have opportunities to ... Of I was going to work with OMA and other organizations, the first thing I'd want to do is have an opportunity, as my company, to put on some sort of presentation and you'll be able to get it out in that way. Right?

You're going to, you're going to teach the basics of something that's very general, they're always looking for speakers, do it that way. It's a great way, and then you can go into explain about the certification process. We're happy to give you all the information you need when you do it. And you get to explain it and show the professionalism that you're leading the industry with in your area. And there's other ways of doing it just simply by having it on your brochures, your cards that you covered earlier. But sing to the high end of it, the high skies. Get it out there.

Heidi J. Ellsworth:

I love that idea. Do a presentation on why certification in estimating is important to them, and how it works and the basics. I think that's brilliant.

John Kenney:

And we're working with some consultants and some specifiers [inaudible 00:52:50] architects around the country that are going to start ... And now in public, it's a little bit different, you're probably not going to see that. But on private work, they are going to require proof of certification or training, because they want to go to ... They're using it as a marketing tool to go in and say, "Hey, the reason you want me to design this roof over my competition is because we're requiring to show the professionalism." Which is another reason why we came up with the project management certification and the roofing superintendent certification. Can you imagine taking your entire team out to a project and you're certified from your project manager right on down through your estimator? Who else out there is going to beat you on that? No one.

Heidi J. Ellsworth:

Yeah, that's great. And to be working hand in hand with the consultants and the architects. Now all of a sudden you have this network. And, just to talk about differentiating your business again, it just takes it to a whole a new level.

John Kenney:

Yep. So I want to add one quick thing. This is ... Everybody may know this or not know, we're making announcements, it's on their website. We're working with Edge on this. Edge is going to come up with their own. We're working with them. So if you guys are sending your people out there to train at Edge, next year you should see a certified professional Edge roofing estimator. So we're working on that to pass the skills. Plus you get a certification that certifies you as an Edge Estimator, as well as a professional estimator. So there's not going to be anything else in the industry like it.

Heidi J. Ellsworth:

I have heard about that a little bit. So I would recommend everybody to ... I mean, obviously Cotney Consulting Group is on. They have a full directory, all the information for this. So if you don't get directly to Cotney, you can always find it at Roofers Coffee Shop. Plus a number of presentations where John has talked about this before, so it just gives you more information. Estimating Edge also has a full directory on Roofers Coffee Shop, and I know that that partnership, along with the one you're doing it next week at IRE with Java and Imagine Technologies, you're doing some really great stuff, John.

John Kenney:

Yeah. You want to come to that if you're going to the show. You're going to see more service certifications coming out that we're working with Java and [inaudible 00:54:59]. It's going to be great. We got a lot of things happening.

Heidi J. Ellsworth:

Yeah. Really good. John. Thank you. Thank you so much. This has been-

John Kenney:

Thank you.

Heidi J. Ellsworth:

... so great, and such a needed program for the roofing industry. So thank you. And Trent and the whole team there, Whitney and Lee. Everybody who works so hard to bring this to the industry.

John Kenney:

Yeah. Thanks for having me on today. Enjoyed it. Appreciate everybody joining us.

Heidi J. Ellsworth:

It was great. And I want to thank all of you for being on this RLW. As we talked about before it is prerecorded, so you can share it. It will be on the site within 24 hours. And tomorrow morning John, make sure this is on your calendar, coffee conversations gen Z takeover. Megan Ellsworth is taken over tomorrow morning with the kids from ... I shouldn't say kids. The young professionals from Clemson and USC sponsored by General Coding. So on-

John Kenney:

I'll be drinking my coffee and watching, you can guarantee you.

Heidi J. Ellsworth:

Okay. It's going to be good. And you know, this gen Z is one of our most popular. So thank you all for being on here. Please, please go to the directories for Cotney Consulting, check out everything out there, and share this RLW with all the other roofing professionals out there. We appreciate you all. Have a great day.

John Kenney:

Bye.

