METAL TALK™

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Heidi J. Ellsworth:

Hello everyone and welcome to this month's Metal Talk brought to you from MetalCoffeeShop. We are thrilled to have you all here. My name is Heidi Ellsworth and we have a great panel today to talk about technology. How are you planning for your business in the digital age? There's a lot of things to think about, a lot of great information to go through, but before we do that, I want to start with a couple housekeeping. This is being recorded and it will be available on demand within 24 hours. We do have our chat on and we would love for you to share who you are, where you're from, what kind of business you have.

Just feel free to chat all the way through. Our panelists will be watching the chat along with myself and we'll try to answer questions as we go along or if they're pretty long questions, we'll answer them at the end. So thank you all for being here. Let's get started. First of all, I'd like to introduce our first guest recurring, actually our contributing editor for Roofer's Coffee Shop. John Kenny with Cotney Consulting. John, welcome to the show or back.

John Kenney:

Great to be here. Thanks for having me again.

Heidi J. Ellsworth:

We love it. For those few people who don't know you, do you mind taking a few minutes introducing yourself, what you do, your company, your great history?

John Kenney:

So my name is John Kenny. I'm currently the Chief Executive Officer at Cotney Consulting Group. Prior to starting Cotney, I was 45 years on the roofing contracting side. I started out in the northeast end of our country and ended up settling down in the south in Florida where I reside now. Been working in the industry my entire career. Currently, now I work with helping contractors succeed in our industry where before I was on the other side, knuckles up doing the actual job myself. So happy to be here.

Heidi J. Ellsworth:

I love the experience, John, I'm really excited for this webinar today. This is going to be great and your esteemed partner in crime today is Karen Edwards, the COO of MetalCoffeeShop and Roofer's Coffee Shop. She also has her own consulting business. So Karen, thank you for being here and can you introduce yourself?

Karen Edwards:

Yeah, thanks for inviting me, Heidi. I always love to talk about things technology, especially with involved communications and marketing in there somewhere because that's my background. I've been 20 plus years in the roofing industry working for major manufacturer, a technology provider currently, as you mentioned, I do in my own consulting business. So I work with some contractors and manufacturers reps and folks around the country as well as RoofersCoffeeShop and MetalCoffeeShop. And I also service the director for the Roofing Technology Think Tank, RT3. So I try to keep myself very immersed in all different aspects of the industry and understand what's going on where, and then hopefully share a little bit of my knowledge to help folks succeed.

Heidi J. Ellsworth:

That's great, Karen, thank you for joining us today. Between you and John, I know we are going to hear some great information. We see this all the time with Roofing Technology Think Tank. John's very active with it, the treasurer, Karen is the executive director, so there's just so much going on. We're excited to share that. So let's get started. Metal construction technology trends. So with everything that both of you are doing throughout your companies with RT3, what are some of the things that you're seeing? And John, why don't you start us off?

John Kenney:

Yeah, well, drones, I love having that to start the conversation off with. I don't think a lot of people out there realize the full potential of drones coming into the industry. Drones now are not only being used to go out and do your takeoffs, get your measurements and that, but they're also a valuable part, especially with the 3D options that are in there now to really get some great information on your retrofits back to your estimating teams. Then on top of that, where I like to always tell people is it doesn't just end in that beginning. If you're investing in the drone and licensing somebody in your company to run that drone, use it for more than just going out and getting pretty pictures. Use it to monitor your operations and your safety program within your company. They're great for training and learning and all the things that go about it, and you use it for marketing and all the other good things on top of it, but it really has a high value right within your company.

So I recommend that you really look into that as being part of your growth pattern in the months and years to come because it's really going to be a big part. Then dropping into green and solar, I think metal, far as solar goes is the perfect companion for the solar industry. I'm seeing on the non-metal side combinations of building it into systems and add-ons, but on the metal side between being able to pull full systems down, mounting across the top of the panels without penetrating through and the fact you now have the films that have been successful last few years going down, there's so many options with metal and it's so durable and strong. I think if you're a metal into the industry, you really got to consider if you haven't yet making solar a great partner in. And then the green, we talk about green, but let's look at it from a couple aspects.

I mean, you have your cool roof, which falls into that. You got your reflectivities, you got your temperature control, but you also have the long life, the sustainability, which is where not only the industry and construction and the world as a whole is moving to you. You've got that saleability and when you're putting it down of having the years of service much greater than any other system out there and the fact that it's made from so many recyclable materials that go into the steel, aluminum, et cetera, and other ones in there. It is a green product and you absolutely should use that towards your advantage when you're going out and promoting and selling as well.

Karen Edwards:

Yeah, I-

Heidi J. Ellsworth:

Yeah. Go ahead, Karen. Sorry.

Karen Edwards:

I was just going to tackle on to John when you start talking about the sustainability of it, think about the next generation who are in their mid to late twenties, early thirties. This is a thing that they've grown up with being eco-conscious and environmentally conscious. And that's a big selling point. When they buy a

home and they will, they're going to want to know that they're not putting waste in a landfill, that they're helping the planet. So I think that's really important.

Heidi J. Ellsworth:

Well, everything we're seeing with solar and metal roofs, John, I just want to go back to that. It's all we're hearing about is how important it is that the solar ray matches the metal roofing, and we know we're seeing a lot of other out there with solar shingles. There's a lot happening. So as contractors look at this, they really need to be thinking about these kind of things, drones, green, solar and how they're going into their marketing program. And so Karen, as people are looking at digital marketing, let's talk about that a little bit.

Karen Edwards:

Their traditional marketing, sometimes there's still a place for that. You're going to sponsor a little league team, you're going to kind of contribute to your community, get your logo in the program, but there's places for that. But where are your customers? They're online. Because you have to think of yourself as a customer too when you are making a purchase, when you are researching something, where do you start? You start on your phone, you start on your computer over your lunch break, you look some stuff up. So you want to be marketing to those folks where they're looking for information. And I mean, we could probably have an hour long webinar just on digital marketing because there's all kinds of things that you can do. And you don't have to do it all yourself, which is really nice because there are companies out there that specialize in helping you do this, helping you know where to find your customer.

I'm sure you've all been in a situation where you've searched for a product and then you see ads start to pop up for that product the next couple days while you're surfing around the rest of the internet. There's no reason your company can't be doing that. If someone is researching solar roofs, if someone is researching metal roofs, you want them to see you and find your company on there. So then that kind of takes us into online branding. Branding overall is a whole another hour, but what does your company look like online? Are you consistent across all the platforms that you're on? How does your website look? Does it have the same logo that's being used on your social media platform? Those are all small things, but they create a picture in a potential customer's mind of the professionalism of your company, of the consistency of your messaging.

You want that message to be very consistent. I can't think the stats off my head, but somebody has to see something so many times before they remember it, and you want to make sure that you are presenting that consistent message to them. Now, another bonus that comes along with digital marketing on your online branding is you get data. And data is hugely important to look and say, what are people interested in? What ads am I running out there that are getting more clicks than other ads? What's working, what's not? And because it's digital, it's pretty easy to change pretty quickly. It's not like you have to wait till something goes to print and runs off the printing press and it has a new design. It's much faster and the data can tell you a lot of information about what your customer is, about their behavior online. It's really kind of creepy, all the information that is out there. And I know we're going to talk about emails a little bit later in marketing automation, so I'll save some of my comments about how we know what you do online for that section.

Heidi J. Ellsworth:

It's so true. And data, when we talk about trends in technology and metal, I think the metal construction industry is catching up to a lot of these trends just like other trades or construction overall. But you can learn so much about what your customers want, what they don't want, how it's working. And I know at

MetalCoffeeShop we're constantly... I'm always like, well, what's the data behind it? What are things saying? And so we're always trying to pull that. But those predictive analytics, John, I mean that's what we're starting to see is it's not just the data, but it's this whole going into artificial intelligence, AI and predictive analytics. It's kind of scary, but also really important that business understands it.

John Kenney:

Absolutely. I can tell you as a contractor out there, even if you're a manufacturer, your data is absolutely gold. There's nothing more important than the data that you have. And I'm going to look at this from differently than the marketing aspect that Karen covered with us in the sales. But if you take this from your operational data that you have, you should be keeping track of how you're performing, the types of roofs you're doing, the areas you're working in, who your crews are, what the subs may be. All of that is data. I live and die by data from my entire career, but it used to be we got excited when Excel came out because that made it a little bit easier and you didn't have to do it on paper, but it takes so much time to digest all that.

But now with AI coming into the picture, it is going to be so much easier to put a program together based on artificial intelligence that reads your data with the parameters you want to get out of it. So if you want to know your most productive crews, I've done this with clients and I've done it in my own end when I was in business where I could break it down to who should be estimating the project and where it should be sold, what margin it should be based on prior data. Because once you get 20 years worth of data in a market, that's a lot. And then you take that and break it down to who should be running the job, where should it be, who should you have on the job, what might be your best project manager because you take all that data and then you mesh it together.

Now, the only thing I caution out there is you're going to see a lot of companies develop AIs that are going to solve every problem that... It's going to happen. It's the new way of the industry, but be cautious on that or, and you get into roofing construction, metal construction, we are a different breed than a lot of other businesses out there, but you should be able to work... If you want it for your own company, if you're large enough, develop, make it. AI's not that difficult to actually put a program together. So I highly recommend that in the future.

Heidi J. Ellsworth:

Along that lines right there, John, we do have a question in here, and I think it's a good example for everybody, but it was from Ken Kelly. Thank you, Ken. What's a good example of how we can use AI to market now? And I can tell you through RT3, we have companies in RT3 right now, Josey Parks with contractor...

Karen Edwards:

Cognitive Contractor.

Heidi J. Ellsworth:

Yep, cognitive-

Karen Edwards:

Cognitive Contractor.

Heidi J. Ellsworth:

Contractor, thank you. And Karen, you probably can mention some other ones who are actually connecting the data from the type of leads you're getting to your sales people to figure out who will match best to be able to do the sales call. So talk just a tad about that.

Karen Edwards:

That's one piece of it. Acculinks is a member as well of RT3, and they just rolled out an AI lead gen that does exactly that. It tells you who's more likely to buy uses AI to however it does it, to predict who's going to be... Say you've got 200 leads and your AI platform tells you these 25 or a 10 out of 10 on most likely to buy, and these 25 are a 7 out of 10. So you're going to know where to focus your efforts for your salespeople, you can prioritize your leads better that way. I know that one thing that Josey has been doing with Cognitive Contractor is getting data that's publicly available on neighborhoods and properties.

And so this is a good example of how we can use it to market. And then his secret sauce, everybody's got their algorithm, their AI that he can run that data through and he can be presented with information that says these homeowners are more likely to buy a metal roof. These homeowners are not. So he can focus his outbound marketing and calls and whatnot on the ones that out of those 500 homes in a neighborhood, he's able to identify the top 50 he should focus on.

Heidi J. Ellsworth:

And Karen, I think we do need to point out, because I'm sure every person on this webinar or who is watching it on demand is going to say, what about all those people who say, I can give you all these leads and LinkedIn and stuff? There's a lot of scammers. So you have to be very careful to do your research.

Karen Edwards:

You do. It's very true. I can guarantee you 10 leads a day, qualified. Yeah, yeah.

John Kenney:

I'll just jump in what you're saying, Karen, and what you just said, Heidi, for everybody out there, if you take a legitimate company as what Karen's talking about, a real company, that's what they're specializing in. Rather than what we all get those 1500 LinkedIn hits about approving this, improving that. What I recommend is you say, fine, show me a sample. Here's my area, give me a breakdown. That all your legitimate companies that are going to market the proper way are going to be able to give you a sample of what you can expect out of it. And then use your own judgment if that works for you. And I think buyer beware, but you especially have to be buyer beware with AI because it's going to be everywhere we look, it's just going to be the new buzzword.

Heidi J. Ellsworth:

Right. And we all know we need to make sure... I think that's great advice. Have them give you an sample or an example because there's a lot of people out there who aren't doing the things right. And then to just finish up on trends, we're seeing it all the time, virtual and augmented reality. John, do you want to finish this up on this slide?

John Kenney:

Yeah. So virtual reality seems to be really moving in the direction for training and learning real life situations, especially on safety. And now it's moving into installation training, finding the younger

generation can actually give you an example, learn how to put down a metal roof and work the seeming tool and all that through virtual reality before they actually get their online training. They're onsite training, which you're at some points if you're going to install, you got to go on a site, but it gets you through that whole big learning curve. So you're really seeing it move into that aspect besides also marketing and sales pitches and all the things you're seeing it in with being able to show your buildings. Augmented reality, where I'm seeing the more of the trends of that is being used to solve problems. So for example is an issue on a project, let's just say it's a service call issue on any type of a building.

They've got working on where you could actually have your tech out there that may not be experienced on that, but they can show that, overlay it and actually be able to send it back to somebody into your office that is experienced and actually show them how to fix it. So it sounds a little too complicated when you think about it in a top site for roofing, but when you think about electrical repairs and all that. But where it can come invaluable in our industry is the fact that your retirees, your boomers that are going out, they really don't have the ability to want to climb or desire to climb anymore, are able to still have a functioning role within your company with augmented reality that's coming out, their tools, to be able to work with your teams on situations they may come across.

Use an example like a flashing detail or something like that, that they don't have the experience with. They can actually show them how to flash it, where they'll draw it, put it right on there, how to over overlap right on the job and overlay the actual condition. So I'm really seeing that and I think that's got some big room for expansion and we'll see more of it.

Heidi J. Ellsworth:

So true. Wow. Okay. So let's talk about those... And first of all, I'm going to say those are just a little of the trends that we're seeing out there. We're seeing a lot of trends, Karen and John, through RT3. I mean, we're just so many things that are coming out of the woodwork and new technologies, but what I think is really important is the ability to take those trends or to take not all of them, but maybe a few that you think can really help your business and start applying that into your business plan and make it actually part of your overall goals and initiatives for the year, whether that's 2024 or the rest of 2023. So let's talk a little bit about adding digital to business plans. Karen, you want to start with the company focus?

Karen Edwards:

Yeah, yeah. I think the first bullet there is really important. When we talk about the customer journey, what is that experience like for the customer? They're going to start with your website, you mean maybe they'll see an ad, maybe they'll click, maybe they'll do a search, they'll find an article that's posted on your site, that's how you're bringing them to your site. And then what's their experience when they're there? Do you have the information that they need? Is it easy to navigate? I don't know if you still have this one on your website. What type of roof are you? And it was a fun little quiz that somebody could take to see what might be a good fit for them. But technology wise, the journey starts on your website. A lot of your manufacturers have visualizers now that more and more of them are adding them.

So a customer can upload their picture of their home, they can change the colors on it, they can see what it's going to look like. So you want that experience to be good for the customer, but you also want it to be fast. You don't want to rush them through by any means. But if they do decide after they spend an hour trying on different color metal roofs that they think they might be ready to talk to somebody, how quickly are you getting back to them? Because we live in a we-want-it-now, right? Instant gratification. I sometimes am annoyed that Amazon's going to take two days to get it to me. It's not going to be there the next day? What do you mean? Or the same day? I don't live in a big enough area that we

have same day, and I'm a little jealous of those of you that do. But yeah, what is that, the speed of that interaction for you getting back to that customer like?

And then don't ever forget about your employees because while we can automate and digitize and have processes in place that can respond to that customer, how does that affect the actual real human beings that work in your company and are the ones that need to eventually talk to that person? You can automate a lot, but you're still not going to remove the human factor from that customer experience and journey. And then I think business intelligence is really an important thing to think about because as this journey's happening, you need to be capturing data and information along the way. And that ties directly back into what John said, data, data, data, it's everything. With data, you have knowledge, you have power. So all of that information helps you understand what your customers are looking for, what they want, what their expectations are, and then you can work with your team and your employees to help deliver those and meet those expectations for those leads, people who are searching and hopefully turn them around and convert them into customers.

Heidi J. Ellsworth:

John, how does that break down to the departments? Because as they're putting this business plan together, everybody has to be on the same ship.

John Kenney:

So the first thing when you're looking at reviewing technology of what's going to work between your entire operation, your entire team, sales, marketing, estimating, operation, finance, human resources, whatever it may be, you need to have a technology vision. All right? So what I mean by technology vision, you really need... And I always love to go back to whiteboard, I love white boarding. What is your vision? What are you looking for? Where are you at now? Where do you want to be, right? What's your vision for technology, not your vision of your business day-to-day? And then from that, you got to ask the question. Basically those whys, right? How are you going to do it with your vision? Why do you want to do it? How are you going to get there? And those. Then it comes down to where we'll go in picking that out.

And you got to think about not so much at this point, really think about one software to do it all. Really at this point, what do you need for each one of your divisions within your company? And once you get that part down, then you can move in to the next levels. And then touching on the last of it, when people say, how much does it cost? I'd rather look at software of getting the cost, but what is the return on investment? Don't look at it as what is it going to cost me to use in the business, but if I add this cost in, what am I going to get in return? When you look at it like that, if you don't have a good return on investment, then you probably don't need it. If the return on investment is very good, which it should be when you're doing any kind of updates and upgrades, then it is something that's meant for you. And if it's not, go back to that vision, repeat the process till you find something, it may work. So that's what I recommend.

Heidi J. Ellsworth:

And one comment I would put in here too is as you're looking at adding technology into your business plan, let's use a drone as an example. So you decide in 2024, you want to use drones, you're doing your research this year, and then you're really looking at, okay, that ROI that John's talking about... Well, drone footage can be used in sales, it can be used in marketing, it's definitely can be used operations, safety, finance has to pay for it. But those are the kind of things that as you're looking across the company and your employees bringing this new technology in, how is it going to totally affect that culture? And we're going to talk about that a little bit more, but also how is it being used across all parts

of your company? Because sometimes one division will get it and then it just stays there and it's not used by anyone else, and that's kind a loss.

John Kenney:

You're correct. And if you don't look at it as an owner that this is the next cool thing, I have to have it because more than likely you're going to buy the wrong thing. Look at it as you now going to sell each one of these departments. Whoever's recommending you got doing this, they need to sell the team on why this is a good return on investment, how it's going to benefit their day-to-day lives and improve their efficiencies in their job. That's how it's the right choice.

Heidi J. Ellsworth:

Right. That's great. So as you're looking at that then too, I mean once you put it into a plan, you need to make sure good businesses have processes and they know how it's going to work within their systems. So John, let's start with you on that. And you kind of already started touching on it.

John Kenney:

Yeah, tech stack, I mean that that's a word you hear a lot. If you haven't, you will, especially when you start delving into the software and the technology. I like to try to break things down as simple as possible and how I understand things as I go. Really the best way for you to understand tech stack is really how each one of your technologies are going to work with the other technology. So there is either they're going to interact, they talk back and forth of in part of your tech stack or they're completely separate and you've got to make a decision whether or not you want to have that double entry or it has the ability to use a third party application such as like Zapier or an API to make them talk, that's really what's in tech stack. That's all it is. It's just a category.

And if you think of it that way, that will help you when you're doing your vision and thinking about which softwares to use. I know, Karen, we're working on some stuff with RT3 for the reason to help contractors out, but the biggest thing we hear is I want to get one software to do everything. And honestly, we'll get more into that as we go through this. I know Karen's coming up next on that, but think about it. It's going to probably be very expensive to do that. And when you get it done, will it still do everything you need? Because we're industries changing so quickly. So we like to look at it as by maturity level of where your business is at, by what you might need. And that kind of leads in to the next level here in the CRMs and ERPs. You want me to continue or Karen, you got some want to jump on that?

Karen Edwards:

Go ahead, John. You're doing great.

John Kenney:

Okay. CRM, right? Customer relationship management, that's what it really means. That can be a multitude of things. There are very low end CRMs out there, which do the basics that you need for tracking. And then there are what I want to call super high-end CRMs that can really track your marketing, your sales, your email campaigns. I mean it depends on what you want to get out of it. So again, CRM, I think every contractor and business out there has to have one. Honestly, I don't know how you can operate a business today without some sort of CRM. It's just, oh, if you're just operating out of your email without having something very difficult for follow-ups.

So most companies at any maturity level, CRMs probably the first software they're going to get into. And then that ERP, that's kind of what we're talking about when we're talking about one software does all

your enterprise relationship processes. You're building that all out to develop. It's a lot of customization. There's softwares that fall into that category. They're usually more open to build out to what you want and on customizations. Usually you'll see your larger, more mature businesses jump into that because it is usually a lot of upfront costs.

Heidi J. Ellsworth:

Karen, as you're kind of looking at this with the tech stacks and CRMs, business intelligence, we kind of talked about all of that in the last slide, but really it all in the process is if you don't have strong communications, technology can actually hurt your brand if it's not incorporated the correct way.

Karen Edwards:

If you're not using it correctly, if it's frustrating your team, if it's frustrating your potential customers, yeah, it can. And I think it's real important to reiterate what John said, how we look at it. It really depends on the maturity level of your business. If you're a new business, you're just starting out, maybe you don't have any employees or you have one, maybe it's a spouse that's working. Your needs are going to be different, not going to need the big full powered stuff. And there are solutions out there like John said, that are not as robust. They're light versions. There's even free versions of some of this software. But no matter the maturity level of your business, you still need to communicate and you still have a brand, whether you're building that brand or you've been around for longer, your brand is your reputation in the service area where you do business. And you're either nurturing that and growing that and positioning yourself correctly or you're hurting it.

Don't implement a technology just because you think I don't have any technology right now in my company and I need something. But we want you to look at what problem are you trying to solve for communications? Are you not able to keep up with the calls to your customers? Well, maybe a email program might help you that could set up some automated updates to customers. So that's what you look at first is what problem am I trying to solve? And then you look at what solutions are out there that can help you solve that problem.

Heidi J. Ellsworth:

Right. And how that all is affecting your brand. And even more important, your company culture, how do you do this adoption? Because if you don't have the right company culture, if you don't present it the right way, it can be killed before it even starts. So Karen, maybe start us out on that.

Karen Edwards:

Well, can I use you as an example?

Heidi J. Ellsworth:

Yes, I think that would be awesome.

Karen Edwards:

So at RoofersCoffeeShop, MetalCoffeeShop, we implemented this online tool called Last Pass. So we wouldn't have to constantly be asking each other for what's the password to that, what's the password? We could just store it all in there and share it. Well, for Heidi and I who are used to keeping all our passwords in a spreadsheet, I know, IT people cover your ears. It's been hard making that change. And when I asked somebody for... I asked Megan, we got a new thing for recording and I said, "Well, what's

the password?" "It's in Last Pass." And I'm like, "Ugh, you just told me." So I'm guilty of it too. I think of myself as technology friendly and knowledgeable, but you have to look at that. You have to look at what is the culture within your company and this was really important, the second bullet, what's your change management process?

This came up at our RT3 meetup, we were at the Oracle Innovation Lab just last week, which was pretty incredible. Check it out. It was a really cool place. We saw some really cool things. It's all focused around construction. And that came up as like, okay, great, we're going to roll this out, but what is the process that exists in your company for rolling this out? You can bring a horse to water but you can't make him drink. I think you really need to look inside and talk about that and communicate, talk to your team. I think John, you mentioned that earlier, talk to your team.

John Kenney:

Well, you have to and you need to get the feedback from your team. One thing I want to throw in here kind of fits between the last slide and this one is when you're doing technology, I want you to understand if your company is a mess with its procedures and you're going to jump into technology to solve that mess, all you're going to have is a technology mess. So one thing when you're going through this, you've got to get your business processes figured out first. That's how you decide where you're at in your level and that's how you decide what software work best.

I always like to talk, whether it's estimating sales, I don't care what it is, software is a tool in your company and it is a great tool and you need to have technology tools, but it will not solve your core issues in a company that technology's not meant to solve. And you got to be careful with that because a lot of times people tell us, solves all your problems. You can estimate, you could sell. No, you have to have those processes in place. That's where the communications comes in highly is understanding from your departments what their pain points are. Now it doesn't mean you fix them all but know how you fix them if you're going to adopt the technology so they're both done at the same time or one first and then move into technology.

Heidi J. Ellsworth:

And I have to say with that, what both of you were saying with the communications and the mentoring and so for example, a lot of this, when you are making that change management process, when you're looking at your processes and bringing in, it does have to be led from the top. And Karen and I are using Last Pass now, but it's not always easy. But on the other side of it, I think as a company for company culture, you have to be open to mentoring from a younger generation. There are things that are happening. So there's a lot of us who maybe are Gen X-ers who are not at... We're doing it because we know we have to, which I think a lot of people are doing it. But look to some of the younger people in your culture who maybe will adopt it faster and be able to mentor you and the rest of the company. You need to have advocates and people who believe in it. And then to John's point, that ease of operations kind of comes from that, right? By having all your processes in place.

John Kenney:

And jump on what you just said, this is a great opportunity for that generational mixing and combining. Your older generation is a little bit afraid of the technology, but they sure do understand how to get work done within your company, right? Because that's what they've been doing for so many years. Then you got your younger generation that's just coming in that may really understand the technology and the benefits, but they may be lacking a little bit on that procedural process of how things get done. You get those two together and work as a team. Now you've got them both moving down the road in the same

direction, which a lot of times doesn't happen with multiple generations. But this is a great opportunity to do that.

Heidi J. Ellsworth:

It really is. It's opportunity and that opportunity can then turn into employee recruitment and retention. Because if you are making life easier eventually, maybe not right at first, but if you're making it easier, it's in a plan, you have a vision and you've communicated that you are going to be able to use that to attract new talent and also keep that young talent who might be thinking, oh they aren't doing what we want so we're going to leave. So John, why don't you talk about this just a little bit, what you've seen working with contractors around this.

John Kenney:

Yeah, I mean absolutely labor shortage. The only thing I could say about that is the numbers you hear out there of how short labor is in construction, you could pretty much double or triple that because it is nowhere near as accurate when you take the explosive rate that is needed to keep up with construction. If all the projects that needed to get done actually got released, we're probably only have less than half of the workforce in all of construction even do that. So labor shortage is real, it's not going to go away. So where does that all come in? Technology plays a big role and at some point to start to slow down the labor shortage or should say fill in for it, next generation recruitment. If you are a technology savvy contractor, you're really going to be a lot easier to adapt and bring in the younger generation that may not really be thinking about coming into our industry.

Let's use an example. Let's just go to drones. I will tell you if you want to, there's no way that you can't find an 18 to 22 year old that is not going to be excited about getting a drone license if they don't already have one at that point. And coming into your company and their job is to run that drone and go around all your different projects and then you've laid out a career path, how they jump through other areas in your company to expand. So you you're going to get people to come in through technology that you normally wouldn't. So it's a great recruitment tool. You're aging workforce, absolutely true.

You've got more people retiring probably to the ratio of two retiring for every one new one coming in. If it's not greater than that by now it's just the baby boomers are almost out, your X-ers are coming close to being the next exit generation. It's happening. So you want to look at all these things in your availability and I will tell you a little bit about recruitment and retainage and mentoring software makes it so much easier to really keep track of those career paths through your company. So you want to look at that as well.

Heidi J. Ellsworth:

Yeah, Karen, you are amazing on your phone and you constantly are like, yeah, we need to have everything with strong mobile accessibility from the field, from everything. So talk about that and training.

Karen Edwards:

Yeah, I think it's really important. We are a remote company at MetalCoffeeShop and we're all over the place. We're in California, Arizona, Colorado, Pennsylvania, Oregon. And so we all use Microsoft Teams and what's great about Teams is there is an app on your phone and that next generation they've grown up with doing everything on their phone. So that's the way they like to communicate. Somebody calls me out of the blue surprised, I usually get a chat first of, "Hey, are you free? Oh okay, let's talk." So communicating with them the way that they're used to, what they've grown up with is really, really

important. It's also really important for retention. Recruitment, great, we've got these fun technology, we've got drones, we've got training, virtual reality headsets for safety training. I know there's some contractors out there using that. So they get to experience what it's like to go on a roof before they get on a roof. Like John mentioned with the installing a metal roof, how to use the seamer tool before they go out into the field.

These technology tools let your team members experience and learn about something before they're thrown into the fire and just told to do it. Plus giving them resources like MetalCoffeeShop, Hey look, this webinar, other webinars on their podcasts, that ability to learn how they're used to learning. I know my daughter only, she watches things on YouTube all the time. I don't think she even turns her TV on half the time and it's gone on her phone or her iPad and she's 28. So that's how she's used to learning. And if your doing that for your next generation of workforce, then they're going to be happy. They're going to appreciate the opportunity to learn, they're going to, like John said, maybe see career path development opportunities for them. Like, oh, I didn't know anything about estimating, but I can watch this training and I might want to get into estimating. So it really keeps them engaged and I think being engaged is really important.

Heidi J. Ellsworth:

And they talk to their friends who then want to come work for you because they like being there. And yes, it's a word of mouth again. And Karen, your transition was perfect because we wanted to talk about generational learning and how important it is. I mean we've been committed to it at both MetalCoffeeShop and RoofersCoffeeShop for many years with our read list and watch initiative. But talk to us a little bit about this generational learning and I'm going to add one word to this, generational communications. How are we communicating with different generations?

Karen Edwards:

Yeah, I think first of all, the read, listen, watch that, Heidi, I give you full credit for that. Brilliant. Because I'm a reader, I really want to read it. If I click on a link for something that kind of interests me, a news article or something and a video screen pops up, I exit out and I close it. Or I look underneath of it to see if there's a transcript and I read the transcript because that's how I ingest that information. Other people are podcasters, they just want auditory. Other people are visual, they want to watch it. So that's one thing that Heidi has been committed to is everything we do, you'll see this online, you'll be able to listen to it, you'll be able to watch it. And we usually put the transcript up as well so you'll be able to read it.

So there you go. Three different ways of learning and it's really important. And it's not that one's wrong or bad, it's a preference. And every individual has their own preferences. So cater to the way that they learn. And mentioning the Teams, the texting, email, email's overwhelming anymore, sometimes. That's why tools like Slack, like Teams they cut down on the number of emails they can be accessed from your phone that we're communicating in the way that they're used to communicating. So engage with them that way. And I personally think it's a lot easier too to have all those tools on the phone.

Heidi J. Ellsworth:

John, you see it. I mean how contractors are working with customers or with building owners, homeowners. You have to be willing to communicate a lot of different ways. I mean there's a lot of people who just want you to pick up the phone and then there's other people who don't ever want to talk on the phone.

John Kenney:

And like you say, going back to read, listen and watch everyone digests information one of those three ways and they have a preferred way. So that's why it's important when you're communicating with clients to find out from them, which is their preferred communication method. It's a proven fact that email within the younger generations out there is disappearing. They really don't use it. I got kids between now 28 and 33, email is just not part of it. They text or they message. And the same way with clients you're going to be working with depending on where they're at in their generation, I like text, but I always recommend that you make sure that is the preferred method of who you're trying to get ahold of with updates and find out when they like to be updated, find out how they want to get their information.

These are all important items to work with your technology, with your client base, but you still got to do that homework and find out then you got in person. And honestly there's still a need for in-person. You got to get in front of people to either train or understand. I do a lot of training. We have with different generations in companies, but once it's all done at the end, it's still always good to have that in-person finalization of understanding everything and working with the groups. Now in-person can be done over Zooms, especially when you're way far away. But a lot of times being able to go right out on site is always the best. So I think it's fantastic, just make sure you understand which method people like to communicate with the best before you start using your own preference and pushing it onto them.

Heidi J. Ellsworth:

And I am going to say, Karen mentioned Acculinks earlier with automation of customer communications, what we're talking about here with all these types. And we have a great RLW from last year where they talked about this, how they're automating their different communications. So there's a number of different webinars to watch to be able to see that. I want to encourage everybody if you have questions, I know we're coming up on the hour here, please put those questions in. But we're going to end this... When you think about everything we've talked about, how do you put this into your business plan and then how do you put it into your marketing plan because a marketing plan is so key. So Karen, why don't you start us off here on this digital age and marketing.

Karen Edwards:

Yeah, it's true. I mentioned at the beginning, you want to be where your customers are and they're starting their journey online using Google or Bing or whatever search engine they have. And putting those digital ads out there are important. Although I admit I use ad blockers, some ads still speak through, but so you got to be creative in reaching folks. And one of the ways is through search engine optimization, SEO. And that is making sure that your website has the right content on there that Google or whatever search engine they're using will deem it relevant to what that person is searching for online. And this is most often done through one, your pages on your website have to have the right content, the right information, but you have to have fresh content. It has to continue. And that's where the content creation comes in.

It's writing articles, but it's not writing articles about my company is great and we install metal roofs and we do solar too. It's more of thought leadership, positioning yourself as the expert, writing an article about the sustainability of metal and why that's important about the recycled content, about those are the kind of things that people might be searching for and, oh look, you just have an article that went up two months ago on this topic and Google will say, I'm going to show it to this customer because I feel it's very relevant, I meant to say, to what they're looking for. And then of course this goes along with brand. We keep mentioning brand, brand, brand throughout here, the reputation management, Google reviews

are very important. I read reviews a lot before choosing to do business with the company or even buy something on Amazon.

I read the reviews, I want to see if they don't have good reviews or... I listen to that. So managing your reputation online is really important too. If someone leaves you a Google review that maybe isn't that great, it's important to respond to it. Respond to the good ones too, because that positioned you as responsive, as caring as... And yes, sometimes you get a hater out there or a troll that maybe nothing's going to work, but as long as you are responding, then that matters. I think one of the online platforms that's really booming over the last couple of years, especially since the pandemic, it's called Next Door and you can create a business profile on there. It's similar to Facebook, it's like social media, but it's open, it's kind of by neighborhoods. And that's how I found my electrician, that's how I found my fence guy, is people giving those referrals.

So if you have a profile on there, you have happy customers, that's what it's all about. It's about relationships. And then those referrals will come in and all of these activities need to be in your marketing plan. And marketing plans aren't set in stone. They're fluid, they change as new trends come out, as new technologies are developed, you need to be willing to try things out and to change. Now I'll use us as an example again, we have a TikTok for MetalCoffeeShop and for RoofersCoffeeShop and we let our 20-somethings manage that and are surprised quite frankly at the number of engagements and reach that we get on there. But that's something that I was like, what will we even need a TikTok for? I can't even imagine. But we do and it works. So be open. Be open.

Heidi J. Ellsworth:

It also speaks to that next generation. So maybe we aren't watching TikTok, although I know a lot of people are my age who watch TikTok, but it does speak to a different demographic, which I think is important. And as we look at everything we've talked about from the trends to production, operations, marketing, how you're bringing all these technologies in I think is really is about sitting down and thinking about what you need. And so John, maybe you can kind of bring us home on that point of how you're working with contractors out there to really incorporate those technologies and the maturity levels.

John Kenney:

Yeah, so I mean a couple of points that wrap this part up on social media, it's like anything else, what do you want to accomplish out of it? If you're business to business, then Facebook's probably not going to be your main driver, but should you still have a presence on Facebook? I say yes, I say that because it's a crosscheck. People like to crosscheck websites, social media sites and other ones. Now what's not focused enough on is, well we'll show, most of the focus when I talk to contractors is that lead generation. And I always caution them in a lead generation you have to have leads, but if you're buying leads or using services, that leads that you're getting is probably going out to a hundred to two, a hundred plus other contractors, that same exact lead depending on the area. So again, I use QuestNet, but one that's not used enough, which is really good, you can use technology help, managing your reputation to get referrals. So say, are you getting letter of recommendations?

Are you posting them in your social media? Are you getting someone that's willing to come on to do a short video for you, with you? And those are all things you could repost later. If you have something that really makes you either be a thought leader to your clientele or if you have that referral, especially I would say you want to get as much in video today as you can, that speaks more volumes than anything you're going to do prior to that up. It really does. That's what people want to look for. And as Karen brought up, you've got to look... I'm a big plan person. Most businesses that I work with don't really have a business plan. They don't realize why they need it. It is a pain to put plans together but without a

plan... It's a goal is there. And then you should plan. If you don't plan, the goal is just to dream. You have to have a plan on how to put things together to get from point A to the end position. So technology's great, all this is great, but you got to work with it.

Heidi J. Ellsworth:

And you know what you... Oh sorry, go ahead Karen.

Karen Edwards:

Hey, I was just going to simplify it a little bit because it reminds me, John, of when I go to the grocery store without my list and I sort of wander around and grab things and I spent like $50 more than I intended to and I got more than I needed. And when I go to the store with my list, I know what I need. I get it. And it's very similar to a marketing plan, a business plan. It really helps where you're going, what you're supposed to be doing and you're not wandering around hoping that this is going to work.

John Kenney:

And real quick, supermarket were designed for hungry people and unorganized people going in. That's why all the stuff they really want to sell is closer to the cashier.

Heidi J. Ellsworth:

That's right. And I do want to say too, one of the things that we have found interesting is because I've been very big on business plans and doing business plans obviously for RoofersCoffeeShop and for other businesses. But there are things that are coming out now, and this is probably a whole nother webinar, but EOS, different types of systems where the business plans are being incorporated in different ways. So if you're hearing us constantly saying business plan, business plan, but maybe you're on an EOS structure, entrepreneurial operating system, you may have different ways of taking that same information and that vision and communicating it. So it's just a matter of bringing your team together and getting all those communications. John and Karen, I want to say thank you so much. What a great, great discussion.

Karen Edwards:

Thank you, Heidi.

Heidi J. Ellsworth:

Thank you and we are open. We have a few more minutes for any questions if you want to put those in or raise a hand in the chat. That's great. I do have one that has come in and that question is timing is... I mean a lot of people here that you have to do this for the new year and I even mentioned myself a couple times 'cause I tend to think that way. But John, when people are working on a business plan, when is a good time and how often should they be on reviewing it?

John Kenney:

If you don't have some sort of a formalized business plan, the time is now, okay? Don't wait. You want to do planning first, then the whole ability of getting a business plan is, there's certain goals you're only going to update every couple of years. That's why you have long and short term. But it's like any other document, consider it a living document, just like your procedures on how you operate. Yearly review is more than enough of any document once you get it done and that review doesn't mean you're rewriting

it. That review means you're looking at it, does it still match the direction your company's moving in or what goals and vision your company has year after year? But honestly, if you don't have it, you got to start. Time is now. Don't wait.

Karen Edwards:

Yeah. And I just want to put a plug out there because John has a book and it's called The Blueprints To Your Business. I'm pretty sure you can get it on Amazon and it's a great place to start.

Heidi J. Ellsworth:

Excellent. And I will say too, Karen, you have... Something you and I worked on, Building Your Marketing Plan.

Karen Edwards:

Yeah, we have a book for that too.

Heidi J. Ellsworth:

Yeah, she's also out on Amazon.

John Kenney:

I have those on my shelf as well.

Heidi J. Ellsworth:

Yes. I have another quick question. And even though we talked about Roofing Technology Think Tank, this is MetalCoffeeShops, so obviously this is for the metal construction association or industry, but when you're looking at this kind of technology, it really crosses the trades. Whether you are doing just roofing or if you're doing all exteriors or you're doing metal buildings, all of this fits in. So to get information, Karen, a question here, can you share a little bit how they get involved with Roofing Technology Think Tank, or at least be able to read the articles and get the information that you all are putting out?

Karen Edwards:

Sure. If you go to RT3thinktank.com, I'll drop that in the chat real quick here. There is a link on the homepage where you can sign up for the smart brief e-newsletter and that comes out twice a week, I believe, and just has kind of all the big headlines related to technology and construction and some other fun stuff in there as well. We do have memberships available. We're just about full. Though, we cap our numbers because we want to be a small organization that can make decisions quickly, turn things around quickly, but we have a community membership that's open to anyone to join and that involves being invited to our virtual meetups, which we do about three, four times a year where we have tech talks. We just saw a tech talk on our last meetup about a guy who is creating a robot to install asphalt shingles and it's super cool. So we try to really focus on what's next, what's coming. So super easy to sign up for that on the website and then we'll reach out and contact you and get you on the list to be invited to those activities.

Heidi J. Ellsworth:

Excellent, excellent. Well, again, John and Karen, thank you so much for this great discussion today and I want to thank all of you for being on here. Please check out all of our Metal Talks. We have so much happening on MetalCoffeeShop and also our Metal Cast, which are podcasts, so lots of great information out there. Of course, RoofersCoffeeShop, also lots of information. We try to keep it going all the time. If you're looking for technology, if you're looking for business plans, marketing plans, there's a lot of great research and great influencers out there who can help you with this. So until next time, thank you so much and have a wonderful day.

Karen Edwards:

Thank you. Bye.