



JOBBA

7 TIPS TO CHOOSE THE BEST ROOFING SOFTWARE FOR YOUR BUSINESS

ARE YOU ASKING THE RIGHT QUESTIONS?

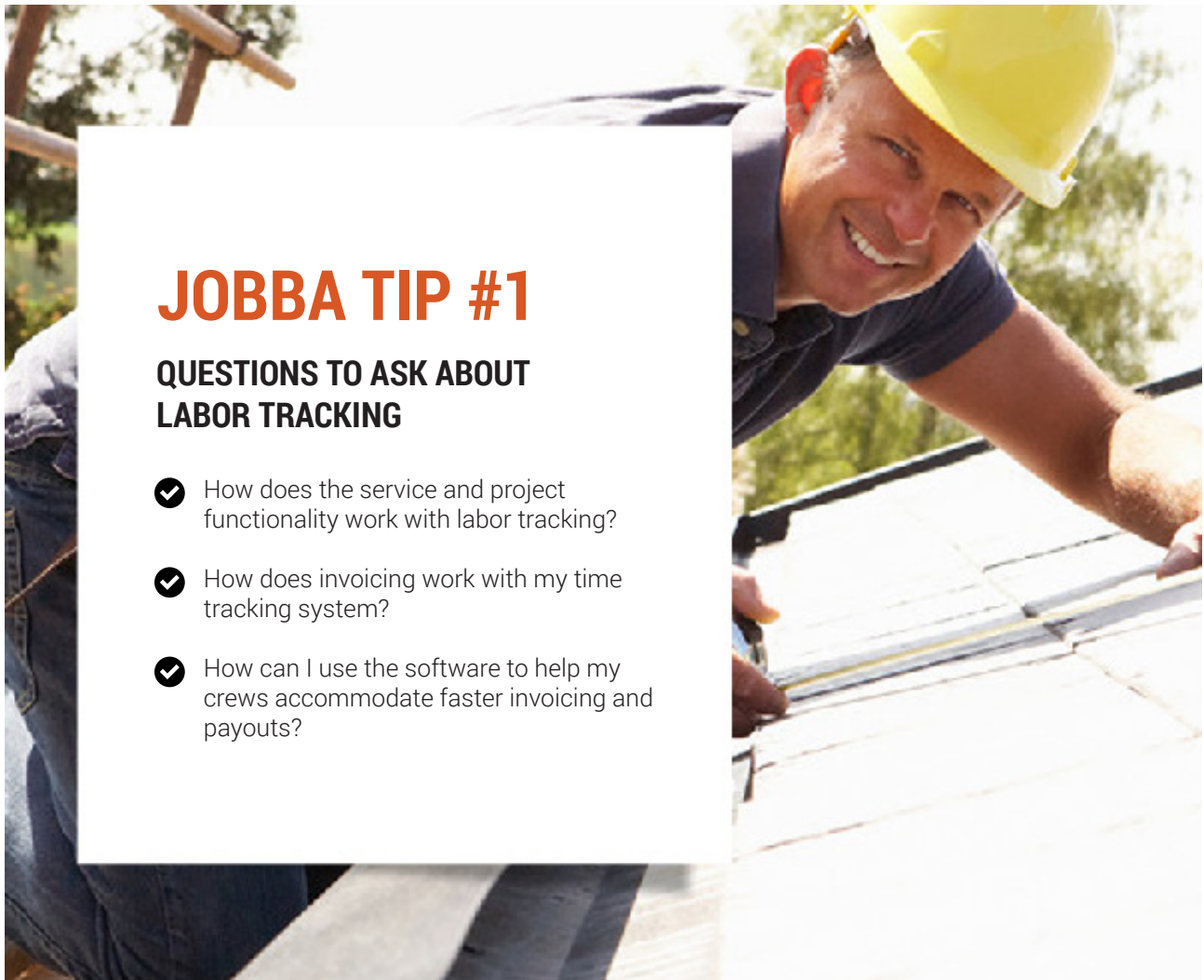


ARE YOU ASKING THE RIGHT QUESTIONS?

Every day contractors encounter companies selling the next best thing to grow their roofing business. Sure, they can sound great, but it's so easy to get lost in the minutia of it all and end up going down several trails that really do not pay dividends for the big picture – a stronger, more profitable company.

Today, many are considering using technology to do just that. And, for a good reason - it works. It can allow your company to easily resolve many pain points like labor tracking, productivity, diversification, job profitability and more. At Jobba, we are focused on making it simple and intuitive to use cloud technology however and wherever you need it. It's very simple, our technology solves problems, helps reduce your pain points and saves everyone time. The right software can do that, but you need to ask the right questions to ensure you choose the right product.

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JOBBA TIP #1

QUESTIONS TO ASK ABOUT LABOR TRACKING

- ✓ How does the service and project functionality work with labor tracking?
- ✓ How does invoicing work with my time tracking system?
- ✓ How can I use the software to help my crews accommodate faster invoicing and payouts?

LABOR TRACKING

In today's world, it is all about speed. Technology is offering speed in processing that has never been seen before. It presents itself in every part of your business from the first client lead through a finished job and referrals, technology lets you stay in front of the customers.

An excellent example: A commercial contractor was looking for ways to improve the customer experience and speed of invoicing. By using Jobba software, they were able to utilize the invoicing module to allow one person to complete service invoicing - in two hours. Before Jobba, it had taken two people two days to do the same amount of invoicing. This means you're saving time, money and cash flow. It also shows customers that your company is progressive, responsive and ready to help them grow their business with expedited turn around.



JOBBA TIP #2

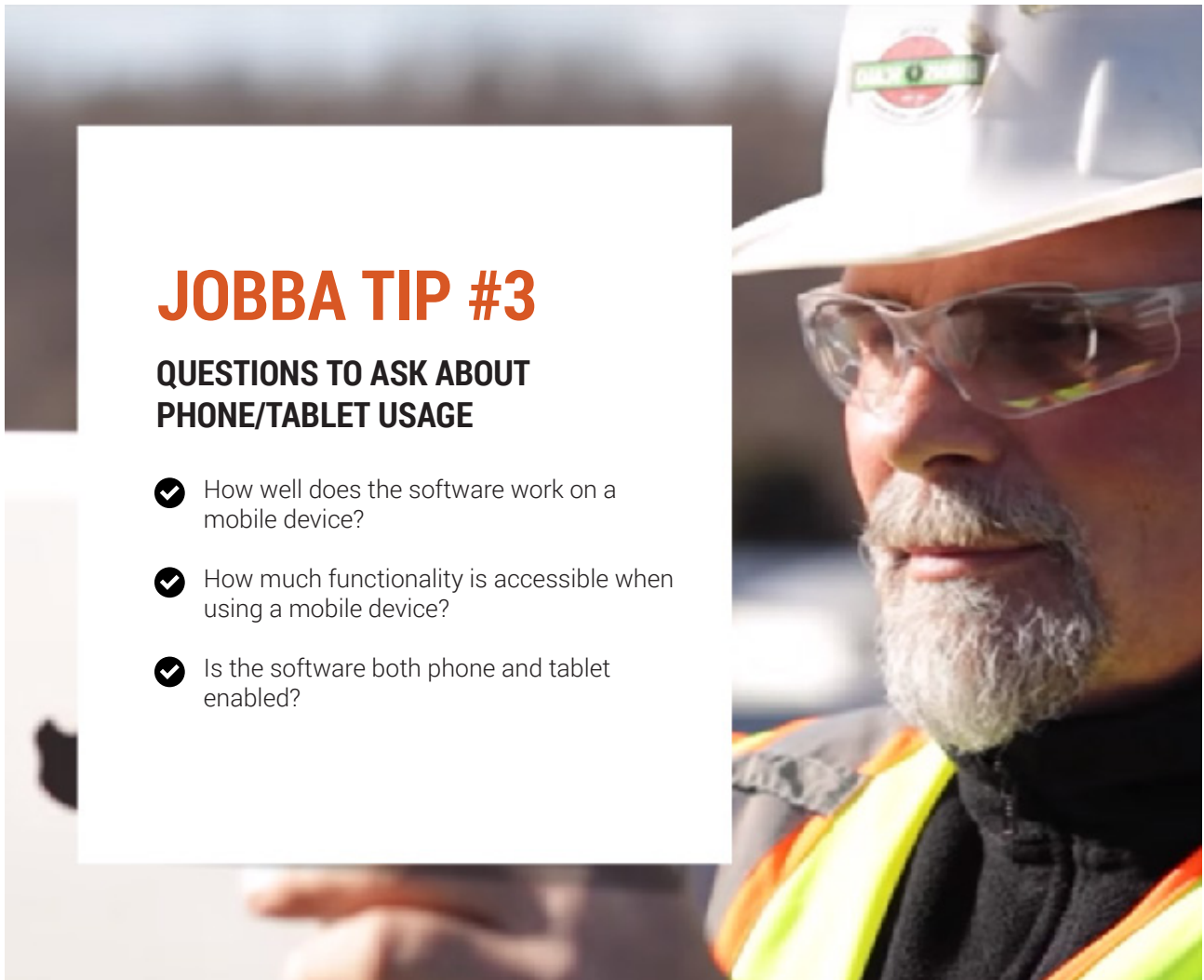
QUESTIONS TO ASK ABOUT CUSTOMER DATA & CRM

- ✓ Does the program work for commercial, industrial, and residential based business?
- ✓ Can I track jobs, inspections, jobs, dispatches, and estimates by customer?
- ✓ Can I integrate it with other software in order to track the entire customer experience?

CUSTOMER DATA & CRM

There are several CRM systems - many of them integrated with project management software. But first you may be asking - what is a CRM? It is a Customer Relationship Management system and it could be Microsoft Outlook, an Excel file or software specifically designed for the roofing business.

Some systems offer customer portals where you can share data, photos, job progress, inspections and invoices with customers at their convenience. This type of CRM can be used for initial customer contact and sales with the scalability to store all of the customer's projects as they grow with the company. This type of system is usually used more with commercial business. It is also a great tool to use if you are focused on HOA work. Whichever CRM you use, the key is to maintain a strong, up-to-date customer database that becomes not only a historical view of your customers and projects but also a strong database for future sales and marketing. By using a CRM software instead of Outlook, Excel or a Rolodex, recording customer communication can be automated, including: notes, past correspondence, property data, material preferences and/or potential future projects.



JOBBA TIP #3

QUESTIONS TO ASK ABOUT PHONE/TABLET USAGE

- ✓ How well does the software work on a mobile device?
- ✓ How much functionality is accessible when using a mobile device?
- ✓ Is the software both phone and tablet enabled?

PHONE/TABLET USAGE

It does not seem possible to survive in today's world without a mobile device and that is especially true when it comes to business. Smart phones and tablets allow contractors to be in touch with their customers immediately - giving them a clear edge when it comes to customer service.

Also, the agility of utilizing smart devices makes sense for instant communication with your team. It is important to use devices in a way that works with customers, so knowing their preferences concerning email, text or phone is beneficial for creating enhanced communications. Part of utilizing technology is understanding how customers want to interact with it. Smart phones and tablets can also make day-to-day business easier to do on the road, eliminating some of the late-night work. In deciding which smart device to use, take the time to coordinate your phone, tablet and computer system with cloud-based software in a way that all devices can speak to each other. This creates an easy, efficient means of transferring data and documents while also documenting customer communications and project status accurately.



JOBBA TIP #4

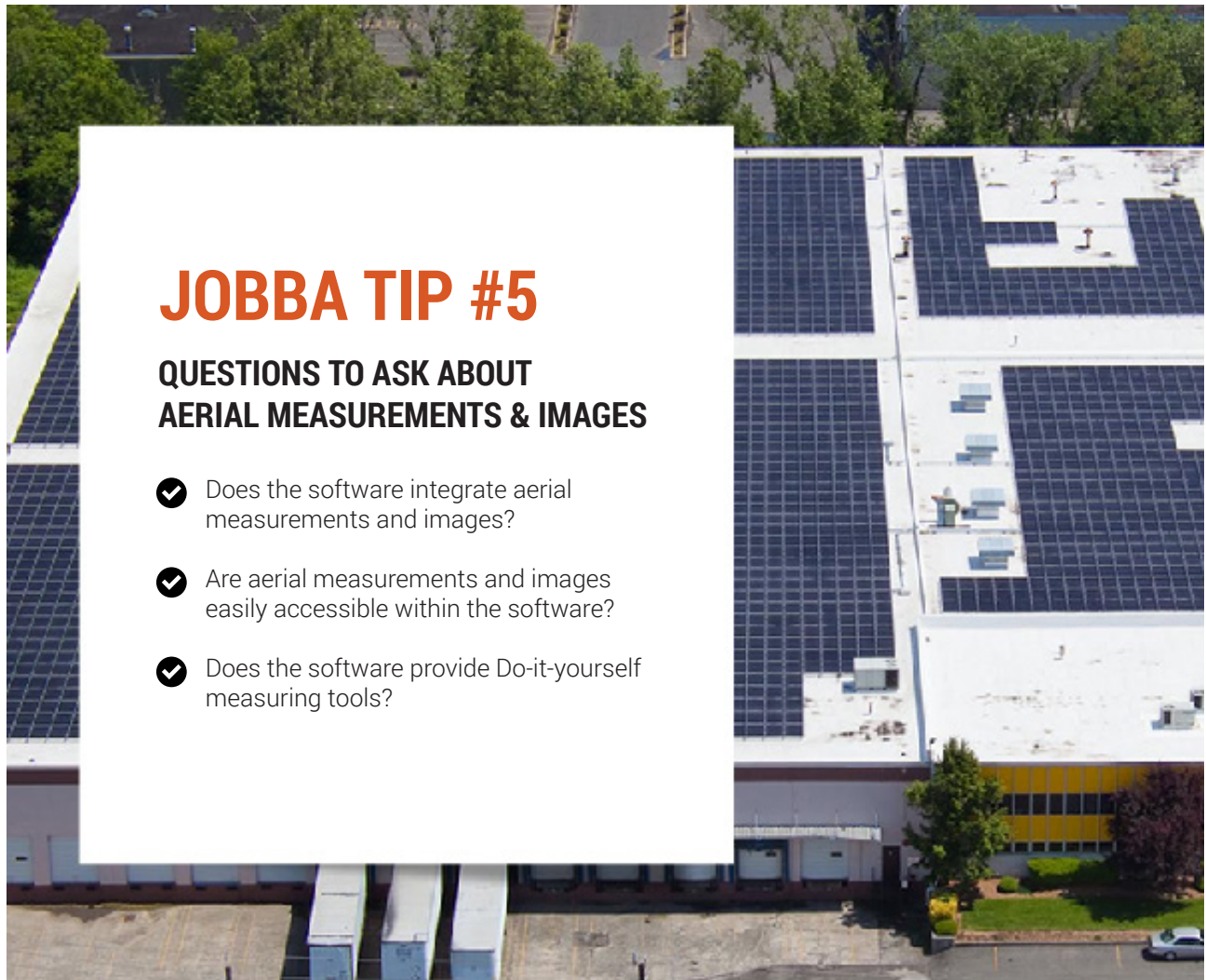
QUESTIONS TO ASK ABOUT CLOUD-BASED ACCESS

- ✓ Are you able to access your data anywhere, anytime?
- ✓ Do you have the ability to download and back up your data regularly?
- ✓ Who owns the data? (Hint - You do)

CLOUD-BASED ACCESS

Today, it's all about mobility. The days of the big server rooms are mostly gone and progressive contractors can operate from anywhere, anytime. This is only possible with cloud-based solutions.

Every step of the process is at the fingertips of management, crews and the sales team. The ability to communicate across numerous, if not all employees, allows for strong communications that correlates into a great customer experience. Questions to ask about cloud-based software include security, ownership and access to your data. It is your data, do not let any software company hold you hostage. It should be easily downloaded and stored in various locations for redundancy. In today's world, security is critical. Cyber crime is at an all-time high so be sure that you ask these critical questions. Then, open your world to processes, data and communications that are available 24/7 with the power of the right cloud-based software.



JOBBA TIP #5

QUESTIONS TO ASK ABOUT AERIAL MEASUREMENTS & IMAGES

- ✓ Does the software integrate aerial measurements and images?
- ✓ Are aerial measurements and images easily accessible within the software?
- ✓ Does the software provide Do-it-yourself measuring tools?

AERIAL IMAGES & MEASUREMENTS

Aerial technology has been in place since 2008 and it just keeps getting better. Gathering roof measurements traditionally was a time-consuming process prone to mistakes such as mathematical errors or simple human error, but has now become a quick, easy and reliable technology.

Many contractors now rely on the service for accurate measurements, professional presentations and efficient production planning. Sales and marketing efforts have also benefited greatly from aerial imagery and measurements. In fact, many sales processes have changed substantially as contractors can now share aerial photos, drawings and measurements of almost any structure with home and building owners. Consumers see this as a clear differentiator. When they can see their property and use the drawings and measurements for reference, it brings a whole new level of professionalism to your company's sales process.



JOBBA TIP #6

QUESTIONS TO ASK ABOUT ESTIMATING

- ✓ Does the software have a strong estimating tool?
- ✓ Does the software integrate workflow processes that incorporate estimating?
- ✓ Are aerial measurements and images integrated into the estimating process?

ESTIMATING

Advancements in estimating software, as well as the introduction of cloud-based access, have put this tool within the reach of virtually any size roofing contractor.

Not every solution will fit every business right out of the box so it's important to understand your company's needs, how the technology fits into your existing processes and what new efficiencies can be realized through the implementation of an estimating software. Some contractors are large enough to require robust, enterprise-level estimating programs that provide job management, estimating and customer relationship management features. While for the smaller to mid-sized contractor, an enterprise solution may be overkill. Smaller operations may want to consider a simple, intuitive, cloud-based solution that still delivers a professional estimate. Whatever solution is chosen, it's important for contractors to make sure that it integrates with the other technologies they are using. For example, if you are using aerial measurement technology, be sure that the measurements will flow into the program and populate the correct fields. Manual entry of data can be time consuming and lead to costly errors in the case of even the smallest typo.



JOBBA TIP #7

QUESTIONS TO ASK ABOUT SOFTWARE IMPLEMENTATION

- ✓ How does the software's implementation program compare to others on the market?
- ✓ How much time will it take to implement the software throughout the company?
- ✓ How reliable are the software provider's onboarding and support teams?

SOFTWARE IMPLEMENTATION

The most important thing you can do before purchasing any new technology is to take the time to do your research. Talk to other contractors you find through roofing associations or networks and see what has worked for them.

You can also look at online reviews and utilize free trials to try out and get a full understanding of the options that are out there and how they are implemented. Once you do decide on a technology that best meets your company's needs, you will likely have to dedicate a specific amount of time to implement it throughout the company. For roofers, a great time to implement new software would be in the fall or winter, right after the busy season and before the new year. During this time, processes may need to be updated, employees trained and data uploaded. It is not easy to adopt or switch to a new software on your own, so be sure to create a good relationship with the software provider upfront. Their support can help you develop a high degree of comfort and confidence when initiating the new technology and processes with your employees.



Schedule Your Jobba Demo & Strategy Session

Jobba is a cloud-based business management solution designed exclusively for the roofing industry. It's equipped with innovative, easy-to-use tools to help simplify workflows, increase profits and enhance customer satisfaction.

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