



JOBBA

ROOFING SOFTWARE 101: UNDERSTANDING THE BASICS

**YOUR FIRST STEP TO LEARNING
EVERYTHING ABOUT ROOFING
SOFTWARE**

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If you are in the early stages of purchasing new software for your roofing business, you know how overwhelming it can be. There are a lot of options on the market with a ton of different features. But before you sign your name on a dotted line, you should go into it knowing everything about roofing software that you can. In this guide, we will break down the basics of roofing software so you're prepared before you jump into the decision phase.



WHAT IS ROOFING SOFTWARE?

Before we can dive into all of the moving parts of roofing software, it's important to understand what it actually is. Roofing software is a type of cloud-based business management software that has been designed exclusively for the roofing industry. It was created to help roofing companies and their various teams effectively and efficiently manage tasks and roofing projects.



HOW IS ROOFING SOFTWARE DIFFERENT FROM A STANDARD CRM?

It's no secret that every industry follows different procedures and techniques. So every business should have access to tools that fit how their industry works. For example, a plumber or electrician wouldn't have the same business needs as a marketing company. It doesn't make a lot of sense for a roofer to work with the same CRM as a healthcare provider.

Most basic CRMs are designed to provide companies with a centralized place where they can store customer and prospect data, track communications, see project/task updates and run business reports. Relatively standard, right?

While roofing CRMs, like Jobba, have the ability to do everything a standard CRM can do, they can also handle more roofing industry-specific details, including:

- ✓ Creating reports, estimates and proposals
- ✓ Ordering up-to-date aerial roof measurements
- ✓ Managing service work and projects
- ✓ Tracking sales opportunities

With so many important roofing details at their fingertips, roofing companies are choosing to implement roofing software as a more efficient way to manage their business and increase their opportunities.



WHY IS ROOFING SOFTWARE BETTER THAN A DIY SOLUTION?

A lot of business owners—including roofers—have the same question before deciding to add a CRM or any new software to their business plan: Why is this a better option than how I currently manage tasks and have for years? Because your business handles so many different projects of different size and scope, it's not surprising that vital information can fall through the cracks. Using a self-made process requires using multiple apps and platforms to make sure jobs are being completed and prohibits you from being able to easily handle simple tasks.

However, roofing CRMs, like Jobba, allow you to handle all aspects of your business without having to switch from platform to platform. Your roofing team can easily manage customers and leads, access aerial measurements, handle billing details, and more—all in one location.

Roofing software can also help you understand where your business might be bumping into problems. It helps identify if projects aren't sticking to timelines, missing details/documents, delayed sales and much more.

CONCLUSION

Trying to find the best software for your roofing business can be a very daunting process with all of the different functionality and features available, but it doesn't have to be. Taking the time to identify areas of your business that need work and how you'd like to enhance your goals can help you better understand what kind of software to look for, as well as mark off any options that don't fit your processes and business needs.



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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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