

# How to Digitize Your Roofing Company



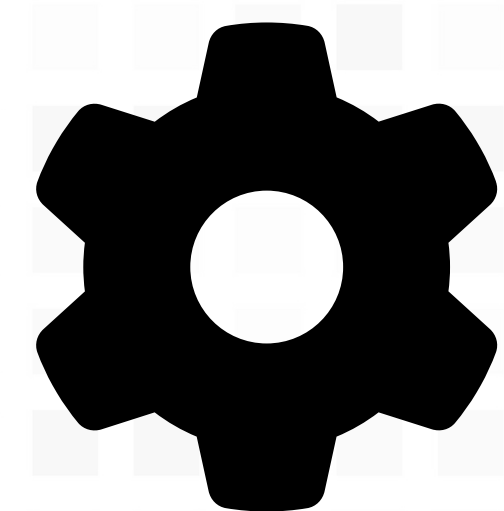
# How to Efficiently Go Paperless

Find a strategy and stick to it. The biggest mistake companies make when they go paperless is giving up efficiencies in the search for a cheaper option. Investment is a big part of this decision, but it cannot be the deciding factor.



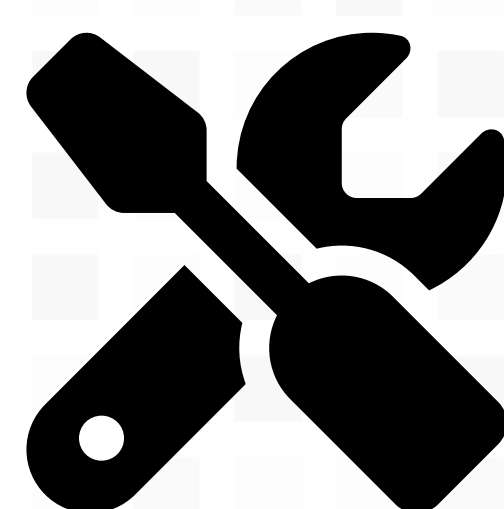
## Analyze and Interpret

Dissect your sales process to identify



## Research is Key to Success

Research tools that solve the key issues identified.



## Find the Right Tools

Find a tool or combination of tools that bridge those



## Choosing What's Right For You

Most often, you will find that the tool with the highest price tag fixes the majority of your problems. Budget may not allow you to use one platform to solve all problems but you must consider efficiency when weighing investment options.



# 3 Options for **Digitizing** Your Sales Process

## 1 Piece Together Your Sales Process

Use numerous platforms and create procedures.

**+** **Pros**  
Cost effective from a software standpoint.

**-** **Cons**  
Costly when it comes to efficiency; Not scalable.

## 2 Build Your Own Platform

Create a solution that is custom to your businesses needs.

**+** **Pros**  
Provides efficiency and offers complete

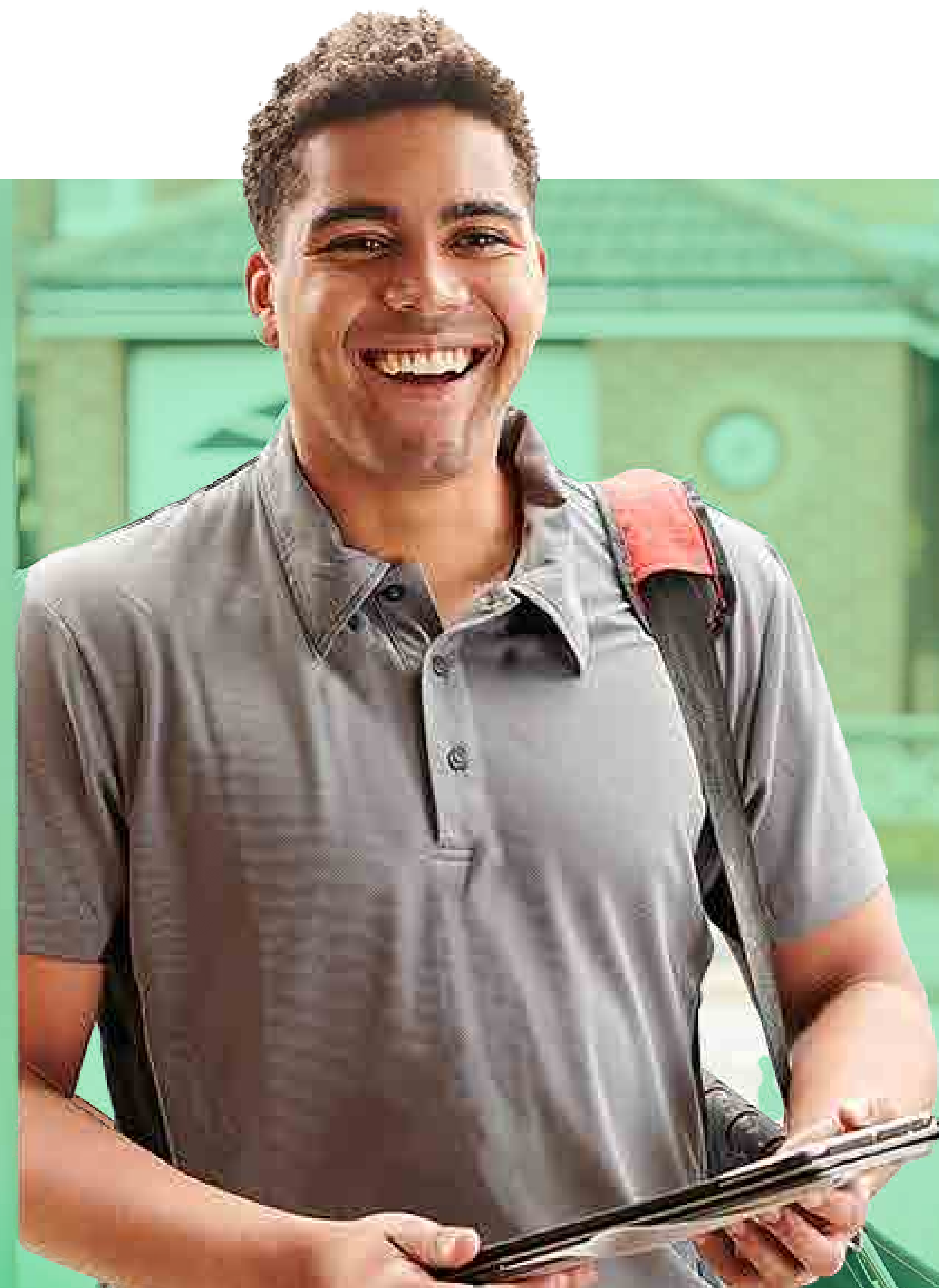
**-** **Cons**  
Costly, money has to be limitless with this approach.

## 3 Implement a Software Platform

Help bring most of your processes together seamlessly.

**+** **Pros**  
Cost effective. Gives you the ability to scale as you grow.

**-** **Cons**  
May need to adjust processes; monthly budget required.

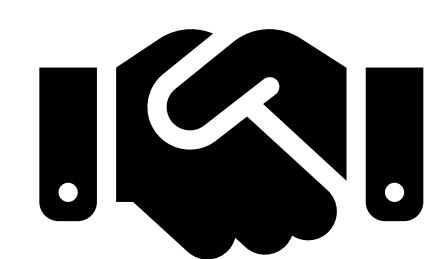




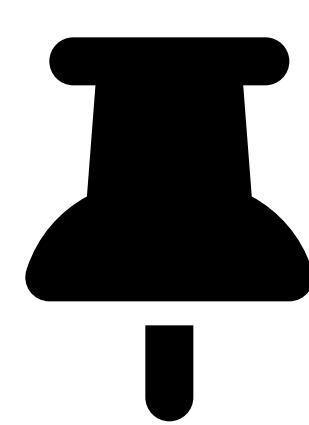


# 10 Steps to Execute **Going Paperless**

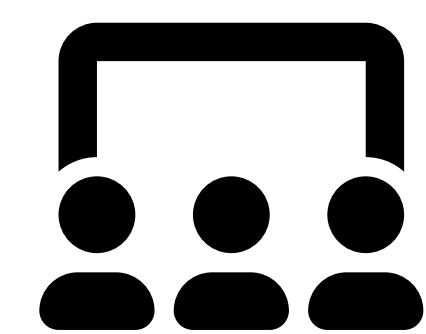
You've landed on your digitization program. Now what? Create a plan with milestones and deadlines. Going paperless isn't an overnight process. **Your organization has to be committed to the change.**



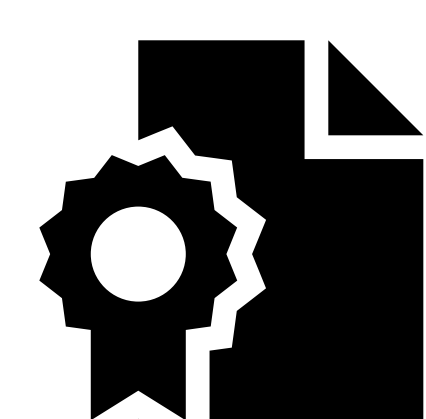
**Ensure that your leadership team is on board.**



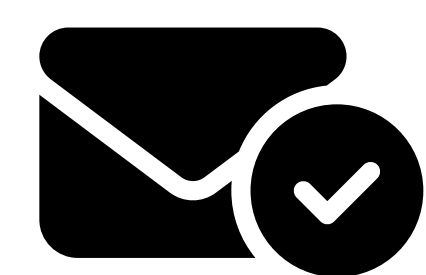
**When creating the plan, include your digital partner from the beginning.**



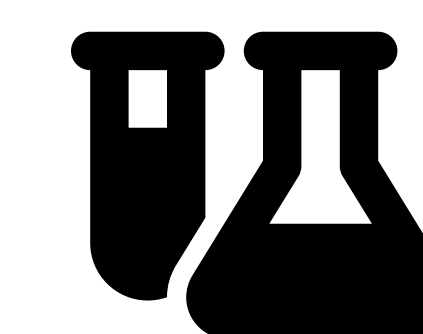
**Set expectations internally and with your digital partner.**



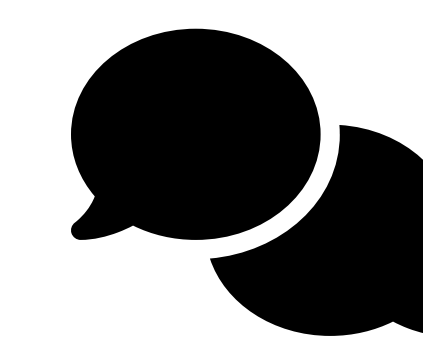
**Make sure to choose the right person to spearhead the project.**



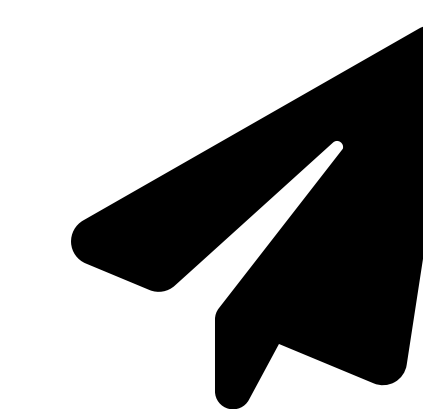
**Communication is king! When things get tough things have to be discussed.**



**Test! Most customizable tools allow you to use them in live scenarios before fully set up.**



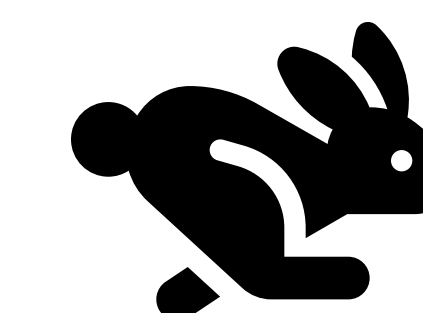
**Work with your digital partner to train the person who is in charge of training sales reps.**



**Create a roll-out plan. Work with your digital partner and stick to the plan.**

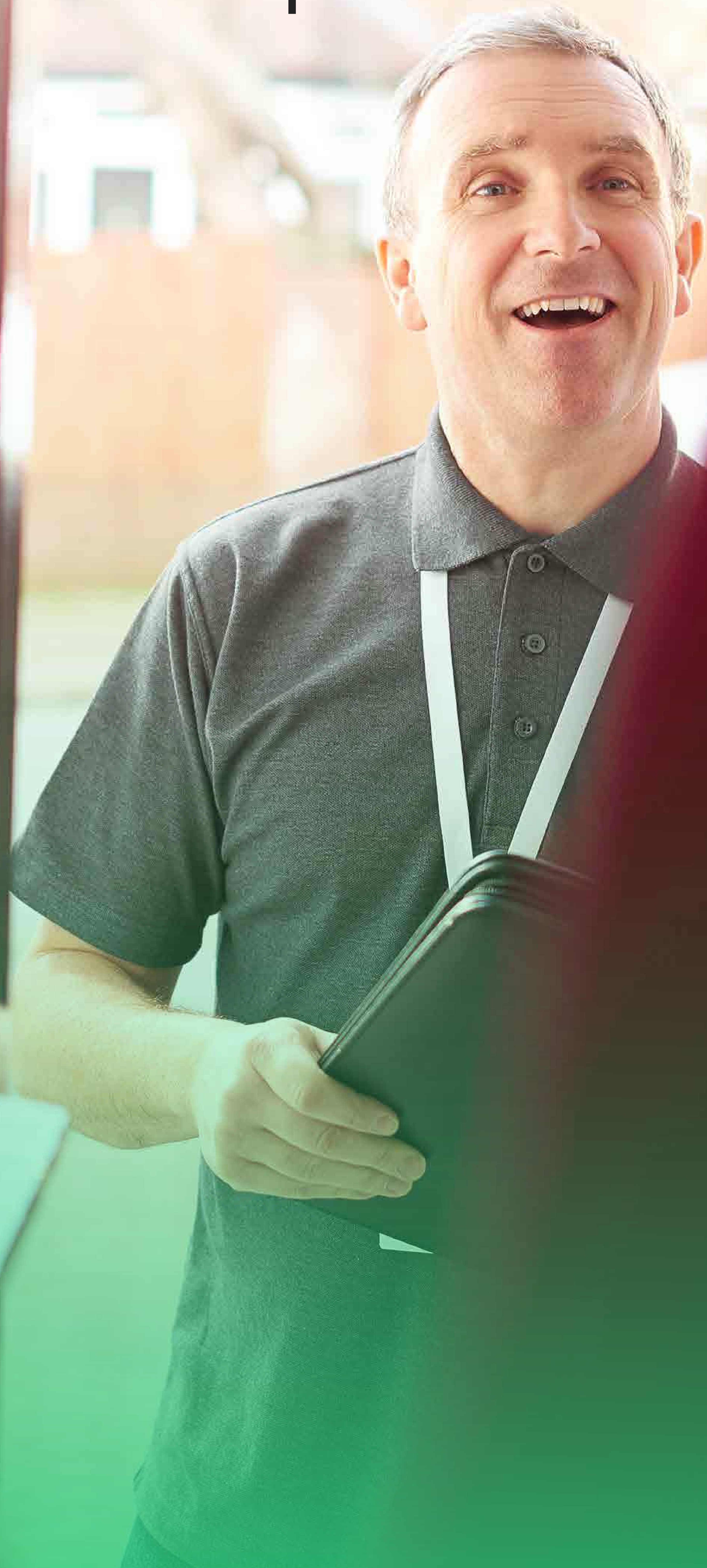


**Create monthly check-ins and training seminars for your sales reps.**



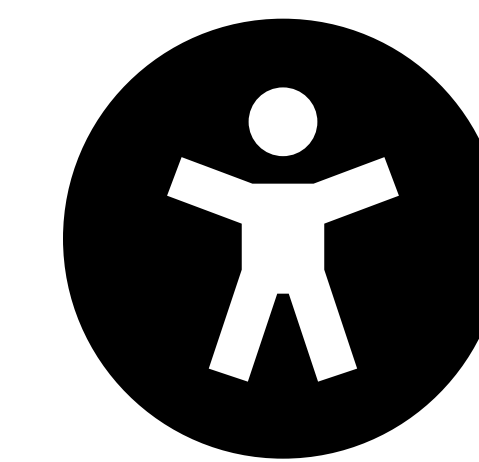
**Do not rush! A steady approach will be worth it for the long term.**





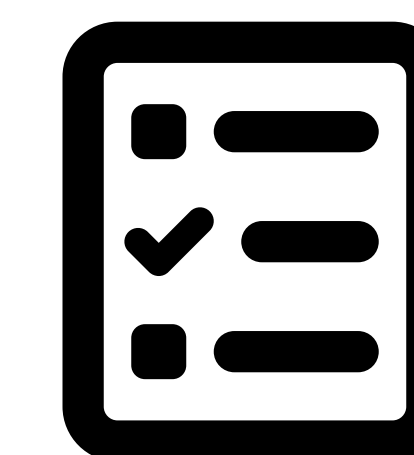
# How to Control Going Paperless

You've landed on your digitization program. Now what? Create a plan with milestones and deadlines. Going paperless isn't an overnight process. **Your organization has to be committed to the change.**



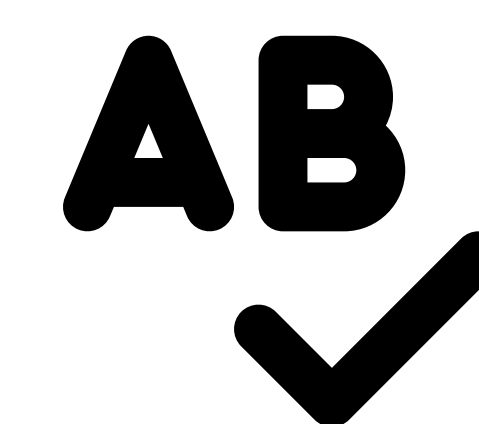
## **Empower Your Sales Team**

Ensure your team is fully equipped with what they need to get started. Provide the hardware and see that your team is properly ready to adopt the new processes.



## **Choose What's Right for You**

Choose a platform that allows the leadership team to monitor usage.



## **Control Your Processes**

Do not give paper to sales reps. Remember – you are in control of what they use in the field.