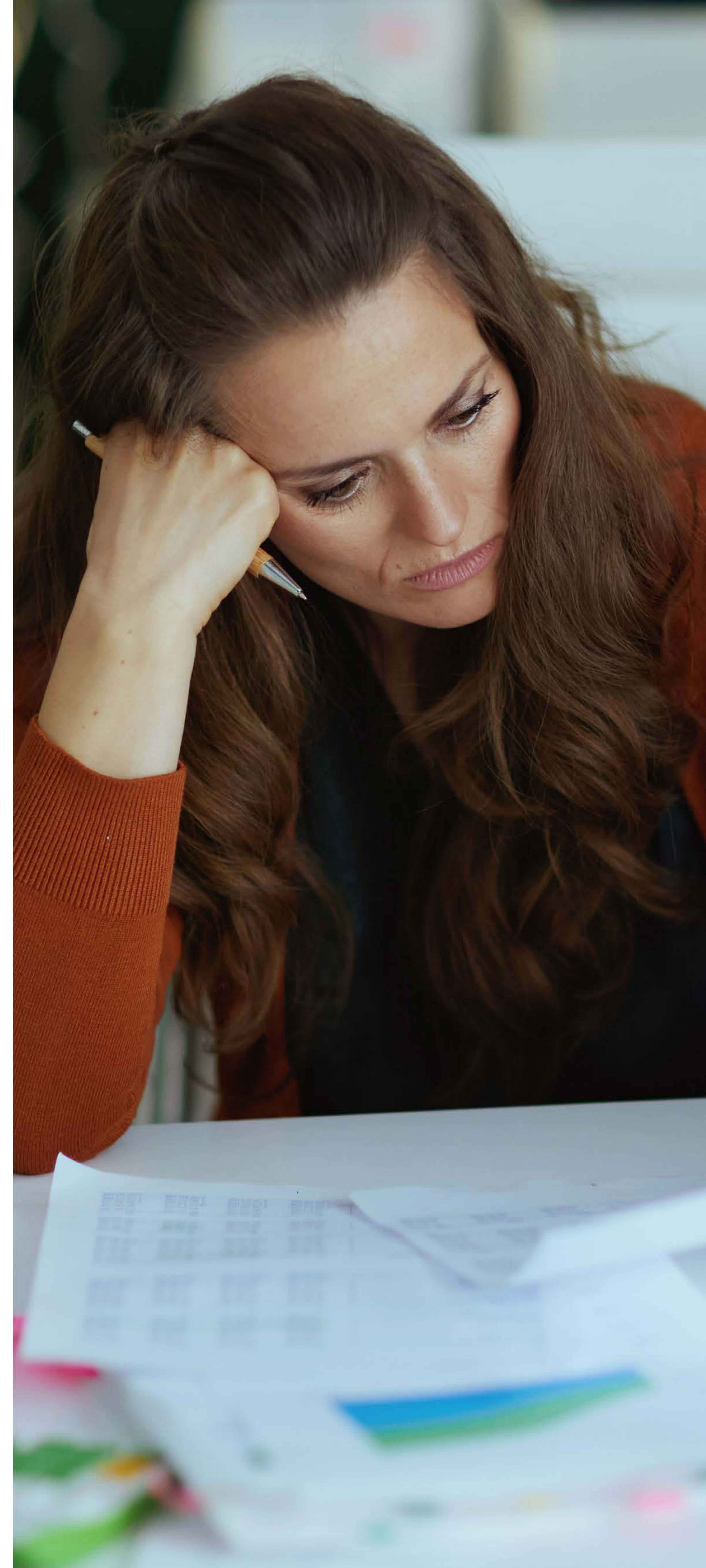




The Job Management Survival Guide





Have a Plan

Wrangling the operations of a roofing company is no small feat. From miscommunications and job changes to endless piles of paperwork, it's all too easy for details to slip through the cracks.

You can help your business run smoothly (and keep your sanity) by planning for admin challenges. Start strategizing before a crisis strikes to handle any issue with team management, paperwork or customer communications with ease.

With this survival guide, handle anything the office throws at you. You'll find common scenarios, what to do in the event that disaster strikes, and some helpful tips for preventing calamity in the first place.

Now that's professional.



Section I

Team Management

Scheduling Crisis | No-Show Subcontractor | Payroll Chaos



1

Scheduling Crisis

You've accidentally scheduled a representative for two in-home sales calls for the same time, on opposite sides of the city. This mistake could jeopardize both sales and hurt the reputation of your roofing company!

Plan

Assess the Situation

Quickly look over the schedule to confirm the double-booking. Calculate travel time between the two appointments to gauge if any adjustments can be made to accommodate both bookings without cancellation.

Contact the Clients

If no sales rep is available to cover the double-booking, choose the appointment that is more likely to be rescheduled without issue based on things like urgency, project size and the nature of previous communications.

Find an Alternative

Check among your sales team to see if another representative is available and close enough to cover one of the appointments, who has the expertise to make the appointment a success.

Call Script

"Hello [Client Name]! I hope you're doing well. It looks like we had a scheduling mishap in the office and will need to reschedule our sales call. I'm very sorry for this oversight, is there another date and time that might work better for you? Thank you so much for your patience!"

Prevent

Use a Centralized Calendar

Use a calendar tool that allows you to view all your sales representative's appointments in one place. This gives you a safeguard to prevent double-booking appointments and allows you to find an alternative more quickly.

Enable Geolocation

Set the practice of entering the location of appointments and using geolocation tools so that you can visualize the distance between appointments and gauge travel time.



2

No-Show Subcontractor

The clock is ticking as the storm season approaches, and a roof repair project is scheduled to start today. The foreman has arrived on time, tools at the ready, but several subcontractors haven't shown up. Every hour lost now can mean days of delay in stormy conditions and real inconvenience to the homeowner.

Plan

Establish Communication

Contact the missing subcontractors to find out where they are and why they aren't on the job. There may be a simple explanation.

Call in Backup

If you can't reach your subcontractors or can't make it to the job, contact other subcontractors to come out ASAP.

Make a New Plan

In the meantime, have the crew present get started, and work on a plan to make up for lost time.

Prevent

Use a Subcontractor Management App

Adopt a tool that allows you to create and confirm appointment scheduling with your subcontractors. Enable push notifications so your subcontractors always know when they're expected on a job.

3

Payroll Chaos

It's the end of the month, and payroll is due. But instead of having all the data you need in one place, you're sifting through piles of emails, notes, and invoices to track down hours worked. As the minutes tick by, you realize you're going to be late for dinner again while you try to wrangle the chaos.

Plan

Send a Reminder

Immediately email all employees and subcontractors to emphasize the urgency of submitting their timesheets in a timely manner.

Set a Deadline

Communicate with the team that all hours need to be reported by a specific date and time. Let everyone know that those who miss the deadline risk having pay deferred to the next pay period.

Create a Central Collection Point

Until you can establish a permanent system, create a single point, such as an email address or shared spreadsheet, where all timesheets can be reported to reduce the places you must look for reporting.

Prevent

Implement a Time-Tracking System

Implement a digital system where everyone can clock in and out. For convenience, this tool should be accessible via mobile devices, browsers and a station at the workplace.

Integrate with Payroll

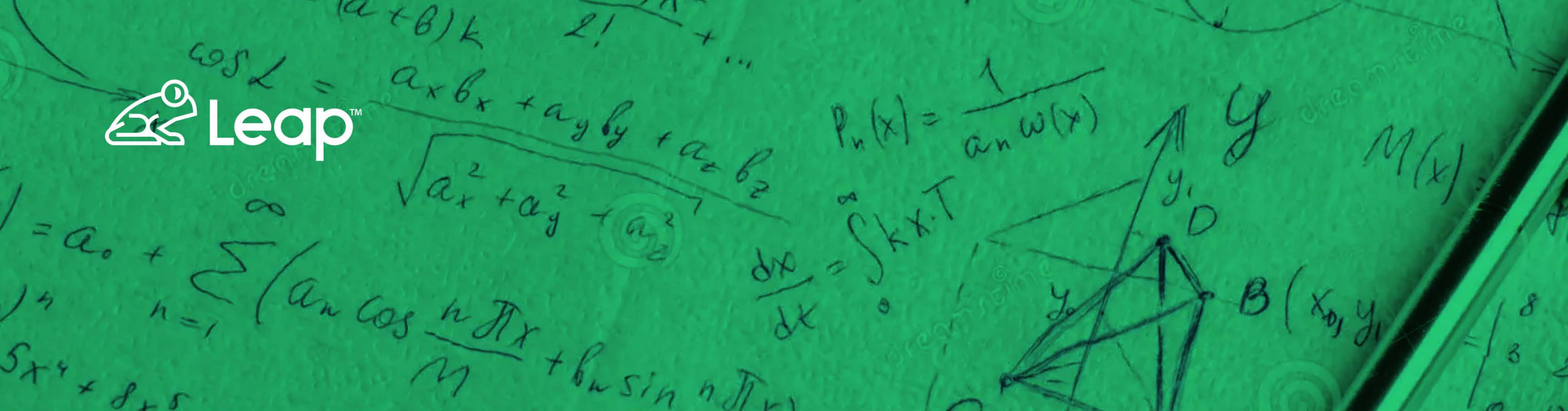
Choose a system that can be integrated with your payroll software to create ease-of-use during processing.



Section II

Getting Rid of Paperwork

Napkin-Math Crisis | Chicken-Scratch Catastrophe | Missing Line-Item Mishap



1

Napkin-Math Crisis

Your new sales rep struts into the office, announcing a hefty deal they've just closed. But as you start preparing the order, you realize that the "napkin math" your sales rep used on the fly to calculate required materials is way off. About 30% short, in fact. Instead of celebrating the success, you're now faced with a dilemma that could mean less profit, or an unhappy customer.

Plan

Redo the Calculations

Carefully rerun the numbers to figure out how big the gap is between additional materials needed and the associated cost.

Contact the Customer

Once you have a plan of action, reach out to the customer and let them know the issue with transparency and any solutions you have to maintain goodwill.

Inform Decision-Makers

Loop in decision-makers at the company to figure out which method makes sense to navigate this oversight. Determine if the company is going to eat the cost, requote the customer, or find a middle ground, such as a discount.

Call Script

"Hello, [Client Name]. I wanted to reach out to you about your recent quote. We've realized there was an oversight in our initial material estimation. Our goal is to provide the best quality work, and to do so, we need to discuss the updated cost of the project."

Prevent

Have Automatic Calculation Assets

Relying on off-the-cuff math can create sticky situations. Use a tool or create a resource with automatic formulas for your sales team to use on-site to calculate accurate material costs.

2

Chicken-Scratch Catastrophe

You're typing up an invoice for a recent roof repair. Everything seems in order until you squint at the sales reps' notes. Is that \$9,876? Or is that a 4? You decide to trust your first instinct. But then the phone rings, and on the other end of the line is a furious customer, screaming about a \$5000 mark-up.

Plan

Stay Calm

Let the customer express their concerns while you note what their understanding of the price was. After all, just feeling heard can de-escalate tension.

Be Transparent

If there's an error, own up to it. Let the customer know about the mistake and resend the correct invoice.

Consult the Sales Rep

Before responding, contact the sales rep who wrote the contract, and get clarification on the exact numbers discussed.

Call Script

"Thank you so much for bringing this to my attention. I've rechecked the contract and spoken with [Sales Representative]. I incorrectly read the handwriting on the contract and am correcting that invoice for you right now. I'm so sorry about that inconvenience!"

Prevent

Get Digital

Handwritten contracts, invoices and notes are the bane of many an office managers' existence. Switch to a tool that allows your sales team and staff to create estimates, proposals and documentation digitally. This guarantees readability and also minimizes the chance that you'll accidentally over or undercharge a customer.



3

Missing Line-Item Mishap

You're rocking and rolling through your day, and it's time to order materials for a big job – a full new roof for a customer. Everything looks good in the contract, until you notice it. The underlayment, a critical component, is nowhere to be found. How could it have been missed?

Plan

Review

Before you reach out to the customer, gather all the facts and determine how serious the oversight is.

Figure Out Adjustments

Find out what options you have for covering the cost. If the customer is unwilling to bear additional costs, the company might consider adjusting the sales rep's commission.

Mobilize the Sales Rep

Inform the sales rep. They've built a rapport with the customer already, so are probably best suited to address the mistake.

Prevent

Create Detailed Templates

Use contract templates that include all the essential items for different types of job instead of a general-use contract. This ensures that critical elements, like underlayment in roofing projects aren't forgotten.



Section III

Customer Communications

The Ultra-Engaged Customers | Multi-Device Mayhem | Lead Flash Flood



1

The Ultra-Engaged Customers

The excitement of a new roofing job is contagious, and there's a homeowner who has definitely caught the bug. Even though you appreciate their engagement, the twice a day calls for updates are starting to be a major distraction. While you want to keep clients in the loop, there's work to do!

Plan

Be Empathetic, But Firm

Understand that the frequent check-ins are a result of the homeowners' investment in their home. Be diplomatic when establishing boundaries.

Call Script

"Hello [Homeowner Name]! We genuinely appreciate your enthusiasm. There aren't any current updates on your project, and to maintain efficiency and get our projects done, we consolidate our updates. Don't worry, you'll hear from us if there's any significant developments. We look forward to working on this project for you!"

Prevent

Set Communication Expectations

Talk over the cadence of updates early in the process so your customer knows what to expect.

Create Central Customer Updates

Platforms like Leap have a customer-specific webpage where homeowners can log in and see progress, next steps and other relevant information!



3

Multi-Device **Mayhem**

The phone rings, and it's a frustrated homeowner asking about an email they sent last week. As you rifle through your inbox frantically and come up empty handed, the realization hits: it wasn't an email. The customer had texted the foreman. The device dance begins as you work to chase down information across various platforms.

Plan

Systematically Check All Platforms

Chasing down important customer communications requires looking at all touchpoints to figure out where the information you need might have come through.

Apologize and Explain

Be upfront about the oversight and correct the current communication structure.

Call Script

"Thank you for bringing this to our attention! I'm sorry that we missed that. I'll immediately get the relevant details from our foreman and get you an answer. We're working on streamlining our communication, so things like this don't slip through in the future."

Prevent

Create a Central File

Create a file for the customer where every team member can input essential communications and remind the team that when they update that file with new details, other team members can seamlessly step in and help.

Use a CRM

Grab a CRM that integrates all communication forms, like phone calls, texts, emails and even chat logs for customers and staff. This puts everything in one place for easy reference!



3

Lead Flash Flood

You just got started with Angi Leads but whew, they're coming in hot and fast! A few leads have slipped through the cracks and are leaving negative comments on your social media profiles after not receiving a response. Time to do some damage control!

Plan

Give a Public Response

Whatever you do, don't delete the comments. Instead, craft a polite, empathetic response to the issue so that your missed lead and your audience can see that you care about their concern.

Take It Offline

Once you've publicly responded, take the conversation offline with a call or a direct message. This shows you treat the issue as an immediate concern and may salvage the relationship!

Reply Script

"Hi [Lead Name!] We're so sorry that we missed your inquiry. We understand your frustration and would love the opportunity to make it right with you. Our team will reach out to you directly to discuss further. Thank you for bringing this to our attention and sharing your thoughts."

Prevent

Set Up Automation for Lead Response

Avoid awkward crickets in your prospective customers' inbox with an automated thank you response. This buys you some time to catch up while letting the customer know you received their message.

Assign Leads Quickly

Make it a practice to quickly assign leads to available sales reps or use a CRM like Leap to automatically assign!



Stay Informed

Want even more tips, tricks and resources to keep your roofing office company running smoothly? It starts with staying informed. Here's some resources to start.



Frog Blog

www.leaptodigital.com/blog/



Leap Webinars

www.leaptodigital.com/leap-webinars/



The Patrick Carr Show

leaptodigital.com/finding-and-retaining-talent/



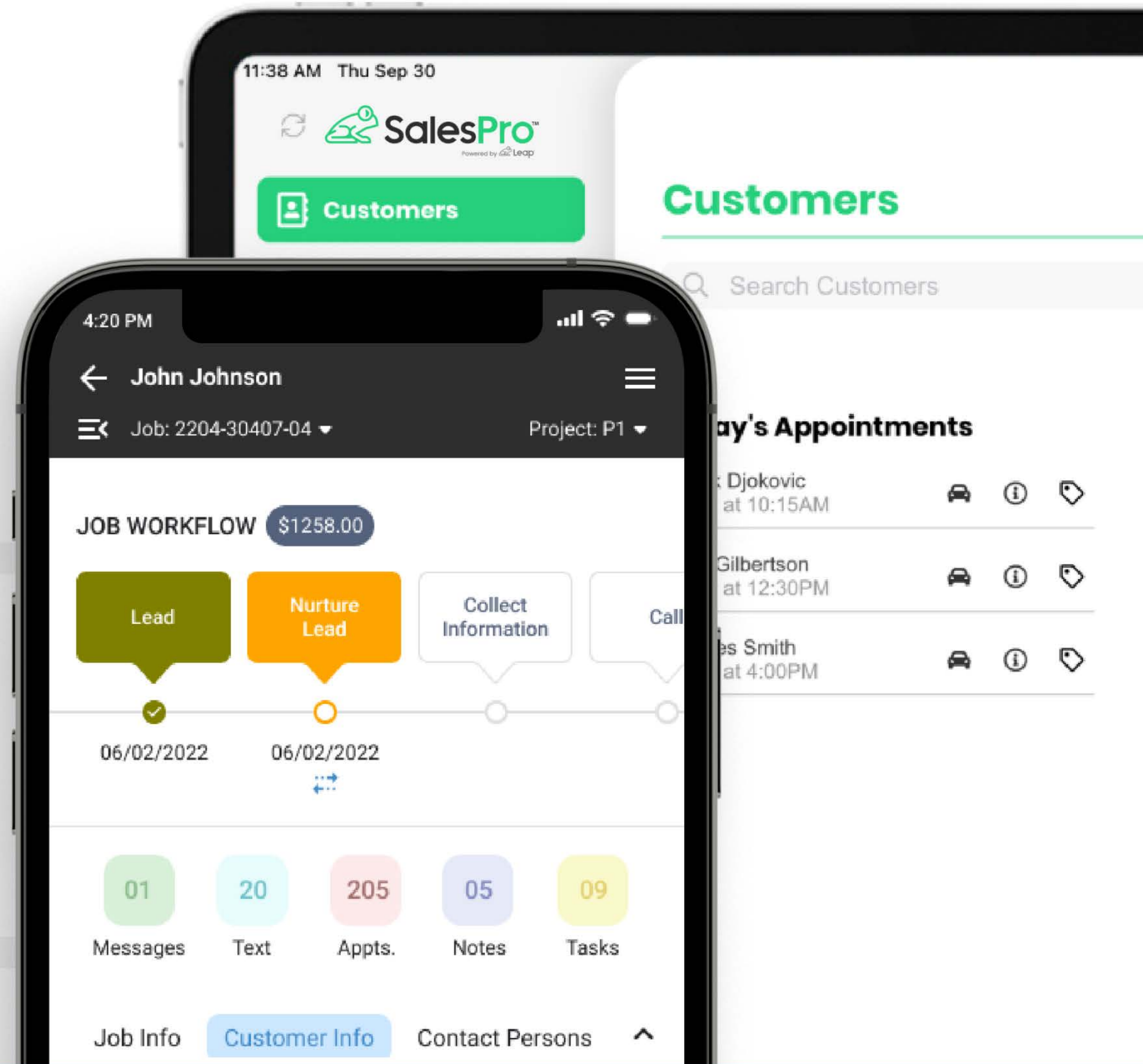
Roofers Coffee Shop

www.rooferscoffeeshop.com/directory/leap



Jump in With the Leap Platform

www.leaptodigital.com



Looking for one place to handle all of these scenarios? The Leap Platform provides business with the capabilities to help companies reach their goals.

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-  In-App Signatures
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-  Ordering Integration
-  Digital Documents
-  Remote Credit Applications