

Roofing Software Buying Guide

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# 5 Questions to Ask Before You Commit





# Introduction

If you're considering purchasing [roofing software](#) or in the early stages of evaluating different applications for your business, you know there are a lot of options to choose from. A number of questions have likely already started running through your head: What should I look for? How do I know what works best for my business? And, more importantly, why should I implement software in the first place?



In this guide, we'll address the top questions you should ask before purchasing a new software application. From identifying areas of your business that need improvement to understanding how software will benefit you in the long run, you'll walk away with the tools to help you make the right decision.





# 1 Why do you need roofing software?

One question that may cross your mind: Why pay for roofing software if I can manage everything myself, the same way I have been for all these years? Handling multiple projects in different stages, across multiple systems can cause long-term problems for you and your staff. For one thing, it requires navigating a variety platforms for different tasks. For another, it prohibits you from being able to easily collect and analyze data across the entire business, which is critical to success.

Roofing CRMs, on the other hand, remove the need to use many different systems to complete various project stages. You can track performance, manage customer details, order job materials, get accurate aerial measurements, manage billing details, and more—all from one place. Likewise, you have the opportunity to identify where your process is hitting snags.



## 2 What areas of your business need improvement?

A question to ask yourself as you think about growth: Where are my problem areas and what do I need to improve? Before deciding on a system, you have to know which areas of your business need some TLC. Production? Operations? Sales? Marketing? Finances? Contractor software provides innovative tools that can optimize all of these different functions.



When it's time to take your roofing company to the next level, these platforms can help tackle any issue for every department of your business.



# 3 Does this software provide your business with the right features?

Not every CRM is “one size fits all”. Some have a variety of tools and features specifically designed for roofing companies, while others offer features that can accommodate the needs of a variety of trades. When deciding on the right software for your business, you have to weigh your wants and needs, and think about which system will ultimately work best for your users and your business.

Reviewing your current business process will help you decide what functionality you should look for. Think about what processes take a lot of time and what you can automate. Keep in mind, you want to make sure the features are easy to use and can be easily adopted by all of your users.







# 4 Who in your company will use the software?

From your sales teams to your office staff, everyone in your company performs different functions on a daily basis that require different tools. Thinking about who in your company will be using the software will help you decide what works best for your business.

If your sales team will be sending out estimates, you'll want to look at providers that offer features like aerial measurement report ordering, which automatically populate an estimate to save your team time. If your office staff will be capturing payment information, you'll want to evaluate different types of billing system integrations.

Doing an assessment of who in your company needs access to the new software can help you decide what tools and functionality you need.



## 5 Will this software help you meet your business goals?

This is probably the most important question of all. Whether your business goals are to increase revenue, expand to multiple locations or just to get your company more organized, it's a key factor to think about when deciding on the right roofing software.

Start by identifying where your company is needing improvement and what kind of goals you would like to set. From there you can start narrowing down the functionality that roofing software providers offer that assists you in achieving these goals.



Need to make your sales team more productive? Look for a CRM that helps them focus on the right opportunities. Want to get your jobs into production faster so you can scale? Look for software that offers features to connect you with your labor teams.

Choosing the right contractor software might seem difficult—and slightly intimidating—with all of the different functionality and features available, but it doesn't have to be. By identifying what your business goals are and what kind of return on investment you're looking for, you can better understand what kind of software to look for and eliminate any options that don't meet your business needs.

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