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*Editor's note: The following is the transcript of an interview with Adam Oaks from Estimating Edge.*

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## 10 Tech Questions You Need to Ask Before Buying Business Software

**Heidi Ellsworth:** Hello and welcome to Roofing Road Trips with Heidi Podcast, part of Roofers Coffee Shop. I'm Heidi Ellsworth, partner at the Coffee Shop, and I'm so happy to have you all listening today. And I'm really excited about our guest, Adam Oaks with Estimating Edge. I was able to meet Adam through Roofing Technology Think Tank right when he started with Estimating Edge and started in the roofing industry, and I've learned so much. It's been great to get to know him, and Adam, I am just really happy to have you here today on the podcast. Welcome.

**Adam Oaks:** Thanks, Heidi. We're really excited to be a part of this. Can't wait to share our thoughts. Looking forward to today's podcasts, and can't wait to answer these questions.

**Heidi Ellsworth:** That's great. Well, when we started working together on Roofers Coffee Shop, we really sat down and talked about Estimating Edge and what was your mission and your goal. And I was really inspired by the commitment to contractor driven development, by your commitment, how long the company has been providing leading technology for the contractors. And so, we really kind of, between us, we came up with this idea of the 10

questions, the top 10 tech questions that every contractor should be asking. And I think it came from exactly the right source, that the Estimating Edge, because you've been doing this for so long. In this new e-book, you talk a lot about best of breed, and I'm pretty sure not everybody is going to really understand that. So, Adam, can you start us off by explaining what best of breed is and how important these questions are?

**Adam Oaks:** Sure, yeah. I think simply put, don't buy software that tries to be everything to everyone. You end up with tools for different parts of your business that are just okay or really don't provide the ROI you're looking for, so best in breed means and the best software for a specific need and make sure that software will fit with your software stack.

**Heidi Ellsworth:** That's perfect, because today there's really no reason that... I can remember in the old days, I'm putting my age out there right now, but when you would buy the software and it was supposed to do everything for you. But now, you get on your phone, you get an app for this, you get a software for that, but you really want them to talk. You've been able to do that, and you've really, from when we were talking about it,

you were very passionate about it. Can you talk a little bit that open platform that really builds into that best of breed concept?

**Adam Oaks:** Yeah. I think when we talk about open, we also talk about scalable. I'm talking about both of those. And when we talk about a scalable platform, what we mean is the ability to grow and manage increased demand. So, the software that you're reviewing should be able to adapt to the changing needs of your needs. Right? An open API, though, is a programming interface publicly available to software developers, and what that means, it provides a seamless flow of data between different software providers. Being open allows those best in breed solutions to work together to benefit their mutual customers. So, as your business scales and you're starting to look at things like AI, artificial intelligence, machine learning, and more, you have to be on that open scalable platform. And right now, it allows you to have the data that you can trust, that you need, and when you needed to make quick decisions, keeping down costs overruns and driving profits. And I want to add to this. These open platforms are in the cloud, and in these unprecedented times, we need to provide our staff the ability to work virtually from anywhere. So, being able to communicate through the internet allows your teams to work together more efficiently and provide better communication to your customers.

**Heidi Ellsworth:** It's really important, and that's not going to change. The cloud is going to become even... I mean, we need to be able to work anywhere we're at and be able to get the information we need. But also, when you're talking about those open platforms, too, you're talking about two way, right? So, data flowing two ways, is that correct?

**Adam Oaks:** That's exactly right. So, when you're looking at, for instance, with estimating software, that's my business so I know it, and connecting to CRM, so when somebody maybe has an opportunity in their CRM and they want to push that opportunity to their estimating software so that way they're not retying in the name of the

job, putting in budgets, doing anything like that, it all flows right through. They put their estimate together and that solution, and then that data moves back to the CRM so that the salespeople, or customer, experienced people can help talk to their customers with real data in front of them and no one's retying that data. A better example might even be your accounting system, so having data and the estimate, which is your budget, push into the accounting system and allow that account to have the real data there. And it can come back with purchase orders and things of that nature.

**Heidi Ellsworth:** I think that is the future. And I mean, I know I'm a little slow sometimes on some of these things, so I know it's been there for a while, but it's really, this whole concept is taking a front row seat. I think, when we think about how many roofing offices out there where they have so many times they are entering the same data across, and so accounting's entering it, estimating's entering it. I mean, that's a huge opportunity for mistakes right there.

**Adam Oaks:** Exactly. And we see those mistakes turn into big budget crunchers, so people, they spend more money than they expected to or are they make mistakes on that purchase order. They're ordering too much material. All sorts of things like that can happen. And having that data flow through seamlessly is going to stop those kinds of mistakes from happening.

**Heidi Ellsworth:** Yeah, that's perfect. And so, for the contractors who are listening to this, as you're thinking about what questions to ask, this one, I think, is one of the most important. And to really bring it down to a very easy question is, can this software communicate with my other software both ways? Can I push information both directions? And that's really that open platform.

**Adam Oaks:** Exactly.

**Heidi Ellsworth:** And that really leads into my next question because, again, I've worked with contractors for a long time who have gone from paper to software, paper to the cloud, paper to this, and all these double entries, trying to

eliminate them sounds great. It sounds great, but that is not always easy for the employees to make the change and for the overall culture, company culture. Can you talk a little bit about that challenge for roofing contractors and some of the things they should be asking about?

**Adam Oaks:** Yeah. I think it's a simple question. Will the software you're considering be completely disruptive to the business? You got to ask that question and understand what that means. And then, how do you deal with that through the purchasing process? One other question: will my older, or should I say more experienced workforce, be open to new processes that improve the profitability of your business? So, sometimes we see some employees, they don't want to change what they do every day, and I understand. But can we and how will you help them make that change? Right? So, that's the questions you need to be thinking about internally. The key to getting buy-in through this process, if it's the right choice, is to include key employees that are going to be affected by that change during the buy-in process, and don't bring them in after you've already made your decision. Bring them in and get their input throughout the entire process, and that way they see the value. Give them the opportunity to learn how the software will improve the business and even improve their daily workflow. They may come back to you and say, "This won't do it." Or they may say, "I had no idea this would really... I can put out this much more work using this software."

**Heidi Ellsworth:** I think you're so smart. I've been in situations over my career where someone said, "Oh, you're going to start using this. You got to like it." And there was no input, there was no buy-in from the employees, and that makes for a really hard transition, not only for the company but for the software provider, too, because they're constantly getting that pushback.

**Adam Oaks:** Right. I've seen it destroy organizations when they've brought in maybe a CRM to replace a CRM because the company

bought another one. They said, "Well, you're going to use our CRM now," and then the salespeople fall apart, sales broke down. So, those can be difficult times. So, really paying attention and asking the right questions, which this e-Book's all about, and going through that process is going to hopefully stop that from happening.

**Heidi Ellsworth:** Yeah. I think that's good. And I think, too, by going over this e-book with your employees and then as you're working with the software companies, making sure everybody understands the important questions, that almost has this extreme opposite effect of building company culture and building buy-in by the time that software comes down the pike [inaudible 00:00:10:03]. So, one of the things I would, and I know we pointed this out in the e-book and I think it's really important too, is once they do make that decision, I think what you just said, if it's going to be disruptive. Because sometimes, no matter how much buy-in there is, it's going to be disruptive. And that takes us to, one of the things I wanted to check in with you also is just the importance of training, and I'm going to sneak this one in because I think that goes exactly with the employees and we talk about that in the e-book. Does this company, this software company, have experience with roofing? Do they understand construction? Do their trainers understand? Can you talk a little bit more about how contractors can dive into those questions about training and [inaudible 00:10:52] experience and all of that good stuff?

**Adam Oaks:** Yes. Perfect. Perfect question. So, I think the right way to go about doing that is asking those specific questions. Talk about what the onboarding process is, talk about who the trainers are, who they train, what's gone through that process. Even ask for references, ask for other customers that have decided to use that software, and get references on not only how the software works, but what's that onboarding process like? And then, speak to internally what the company. Does the salesperson understand the business that you're in, the roofing industry? When you start throwing out commercial roofing terms and you're talking about tear off or any

other part of that roofing project, do they look at you with surprise or do they understand you're talking about what a tapered design is or what EBDM is or what's the drip edge? You start to realize that the salesperson has no idea. That's a signal that maybe something's going on in the organization. Beyond that, ask to speak to the product manager. If you're buying something that's a big expense for you, bill up in the business, don't just talk to the sales person. Say, "Hey, can we get on with the product manager? I'd like to understand what they're thinking." And what kind of experience does the product manager have? That's the person that's going to be developing the software in the future to the ever-changing needs of your business and the whole industry. Did they have knowledge? And an example in our organization, our product manager, a head of product, has worked for a roofing company, he's worked for a roofing manufacturer, and he's been with our software business for over a decade. So, that kind of experience says a lot compared to someone that maybe came from Facebook to work in the roofing industry. That won't work as well.

**Heidi Ellsworth:** No. And I've seen that in marketing over and over again. And it doesn't mean that people can't learn the roofing industry, but roofing people know when people are trying to put something over on them. They know when it's real.

**Adam Oaks:** Yeah, I think you're right.

**Heidi Ellsworth:** That's why I think that's... Yeah. They really do. And I think that's important that companies.... And tell our audience, Adam, how long has Estimating Edge been in the roofing industry and providing technology for contractors?

**Adam Oaks:** Heidi, we've been doing this for over 30 years, and we literally still have employees that had been with us since the beginning, both in our customer success team and in sales and other areas. So, our experience is probably something in the range of over probably 16, 17 years as an average, and that's including bringing on brand new people because

we continue to bring young, new talent into the organizations as we further develop our product.

**Heidi Ellsworth:** I think that's so cool. When I think back 30 years, some of us didn't even have computers back then, and Estimating Edge was on the front end of all of that. That's amazing in my mind.

**Adam Oaks:** yeah. A few people will remember DOS based programming. We our first product was DOS. We've come a long way from them, obviously, in that open, scalable platform that we talked about before.

**Heidi Ellsworth:** I used DOS in my first job out of college, so I know exactly what you're talking about. We all had to be a little bit of a programmer in those days. Let's talk just a little bit about budget because this is a biggie, right? I mean, it's scary to think about the costs that are associated, but I don't think the contractors... I mean, a lot of them do, but there's a lot who also don't understand the ROI, the return on investment, and how large it can be, not just financially but company culture, customer relations, satisfaction, all that. Can you talk about what are the important budget questions to ask and how to relate that to that bigger picture of return on investment?

**Adam Oaks:** Well, this isn't the easiest question you asked me. It's a tough question, and its tough question for everybody, making that decision to buy software. In fact, at Estimating Edge, we buy all kinds of software, including third party software that works directly with our solution that's built in, CRM tool, the counting, and more. Our latest software, we bought is a SAS software we engaged with, and it's been disruptive to one of our business units for almost a year. But we knew that going in. We realize the long-term benefits outweighed that disruption. So, as we talked about before, including department head in the decision after that process went through, they understood what impact they were going to face, but also the long-term value that we're going to get. So, after the initial year, which is coming up now actually, we're seeing reliable

data ready in just moments, where it took days just to get a snapshot of the business. So, I guess this goes back to the question you asked earlier about disruption, but it also goes to getting the ROI. So, this wasn't a cheap software, but we were able to make faster decisions now, see fewer mistakes, and get that ROI we were looking for. So, to summarize, I'd say determine the true return on the investment and how it impacts the long-term growth of your company. That will help you drive your decisions. So, look at it long term. If you're buying software, it's not for a six-month run, right? It's for at least five years and probably longer depending on the changes in the market. So, think about what that means, what kind of efficiencies you're going to gain, what kind of value you're going to get, what costs are you going to save, and ultimately what kind of profitability you're going to see.

**Heidi Ellsworth:** I think that's smart, and I love the fact that you can actually take something that you did in your company and show that... We have contractors out there right now trying to figure out their software, but it's everyone. And I know that's a really obvious comment, but everyone's trying to work through this. It's not easy.

**Adam Oaks:** Right. We've talked about a lot of things today about experience in the roofing industry. You're going to buy software that maybe doesn't have that experience. Salesforce.com is an ubiquitous product out there that we use, and they don't really have roofing experience, but it's good and it does have that open API and connect to so many other providers. So, all of these questions are going to help you drive his decision, not just one of them. But you do need to look at everything as a whole and how it will help your business and that return, as you've mentioned.

**Heidi Ellsworth:** Yeah. And I think, as we talked about earlier, just so everyone knows, we're recording this on March 31st, 2020, so we're in the midst of a new way of doing things with technology being so important, as our pathway into the future of more people probably working

remotely, just looking at things a lot different. But what's cool, Adam, is you and I were involved with Roofing Technology Think Tank, or have been for the last couple of years. I was part of founding that group. And we have these conversations all the time during our meetings, our virtual meetings and our live meetups, of what kind of questions should we be asking about technology for the future? Maybe just share a little bit on your thoughts of what you've seen with Roofing Technology Think Tank and how that's helped Estimating Edge and how you see it helping the contractors a little bit.

**Adam Oaks:** Sure. I've been amazed with the participation from so many different areas in the industry, obviously including the residential and commercial roofing contractors, but also the other software providers, coming together as a team with no boundaries. Basically, sharing information, sharing knowledge about the technology they're using. They're taking away, like I said, all the boundaries and, really, telling them there their secrets, and then we ask those questions, how can we improve even more? What can we do to make the world better? We ask questions that I know would disrupt many of those roofing contractors, and they're right there leading the charge saying, "Yeah, this could change everything we do today if we can make this happen." We visited 3M, which was a great event, and thanks to 3M for having us there and their innovation center.

**Heidi Ellsworth:** Yeah, awesome.

**Adam Oaks:** Yeah. Really, really amazing event. And we learned about new technologies, new product that could maybe change the way the world looks at roofing. And I think going back to what you said, this time that we're facing with this pandemic, it's terrible, it's so disruptive to all of us. But we have to, even now, look at what kind of technology we can use to move forward. I've heard the system we're on today, GoToMeeting, but there's also Zoom and many others. They're selling left and right, more software, because people need to be able to communicate virtually.

And so, when you're looking at software today and other technologies, how can you operate in a different world, and that's not going to stop. The pandemic will end, but the world has changed forever. And so, there'll be more people working remotely, there'll be more virtual meetings and decisions and probably social distancing for a while. When you look at software, again, what I said before, look at it long-term, what's the impact long-term?

**Heidi Ellsworth:** Brilliant. I think that's great. Estimating Edge, like we just talked about, 30 years of doing this, of putting solutions out there, of looking to the future. So, for the contractors out there who are listening to this, talk a little bit about Estimating Edge, what can you do to help them? How can you help them on the... One of the most important parts of profitability is really good estimating, so what kind of questions should they be talking to you about and how can you help them with those answers?

**Adam Oaks:** Well, I hope the e-book's a good start, so use it to make some decisions about when you're looking at not only our software but other software's. You got to look at us internally. We have two ways to help our customers ask the right questions. Our account reps, our sales people, they've been with us for an average, I think, 10 years. We have knowledge that can help our customers ask the right questions when they're looking at other technologies, and we can help those perspective customers by helping them down the path. In fact, we try hard to not sell companies that shouldn't be using our software by asking questions about their business, so we really think it's important from our side that people are successful with what they're using. So, we're going to ask a lot of questions, but in turn, we'll guide you down some of those questions you should be asking us. And another area is our customer success team. When new customers onboard, we literally ask hundreds of questions to help them get their database set up and the tool ready. So, we encourage, in turn, that they ask us questions, and that include how to estimate even. Many [inaudible 00:22:42] people that come in for training on our software are brand new to estimating, and I've got

people on our team that have been estimating for years and now work on our team to help people learn how to use the software. So, we teach estimating along with learning our software, but also, how to build a good material database and how to best pick the next software, as we talked about before, they need to help eliminate duplicate entry for instance. So, those are some of the ways that we help

**Heidi Ellsworth:** Having actually talking to contractors pretty much every day of my life and working a lot with different people, you have some huge raving fans out there. I mean, when the contractors and the estimators talk about Estimating Edge, they are passionate about it.

**Adam Oaks:** We're passionate about our customers as well. We love them, and we want to make a product and a solution that they love. And I think the reason they're passionate is really not only the software, we hope, that's great, but is our people. A good example, I was at IRE in Nashville, the one before Dallas, and our sales rep, John Lombardo, who handles that area for us, was providing demonstrations of our software. And people would come up to me, and I'd introduce myself. I'm the CEO of Estimating Edge, and they'd say, "Nice to meet you." I say, "Well, can I help you?" And they say, "Well, I'm here to see John." I said, "Well, he's busy. Might be a few minutes. Can I help you?" And they'd go, "No, that's okay. I'll wait for John." And I loved it because they really want to talk to him. And then, after John made himself available, they'd go up and literally give each other a hug, and that's what I love about the business I'm in.

**Heidi Ellsworth:** That's what I love, too. I can't wait till we can hug again. That will be great.

**Adam Oaks:** Yeah. Good point.

**Heidi Ellsworth:** I know. Well, and I have to tell you, on Roofers Coffee Shop, we have our classified section, and in that classified section we will find people saying, "Looking for estimators who are knowledgeable in Estimating Edge." So, it's not just people being raving fans and passionate, it's about employers saying they're looking for

estimators out there who are working with your software. That's huge. That's a huge compliment, and also just shows what a great business and software that you offer the industry.

**Adam Oaks:** That's wonderful. Thank you for saying so.

**Heidi Ellsworth:** Yeah, it's very cool. Well, Adam, this e-book, I really hope... I mean, it's on the site. It is in the e-book section. It is on the Estimating Edge directory. You have an ad running where people can click on it to download it. I know you're going to have it on your site. So, really, this is the type of thing that contractors need to download, share with their team no matter where they're working, have everybody looked through it, and really make this a part of their purchasing processes. And I want to thank you for that gives back to the industry. I think that's one of the most important things is for us to continue to educate our industry on technology and where we're going.

**Adam Oaks:** Well, thank you very much, Heidi. I appreciate you having me on today, and I'll just say that if anybody has any questions, our

team really would answer questions about other software that we might have information on about other customer using software that's more successful than others related to Estimating, because they all connect, but not Estimating software necessarily. So, we're happy to help any way we can. Please give us a call. We'd be glad to help. And Heidi, stay safe and stay healthy.

**Heidi Ellsworth:** I will. Thank you so much for being here today, Adam. I love your team, so same back to you and everybody there to be safe. And we'll be seeing each other a trade show sometime in the future, I know.

**Adam Oaks:** I hope so. Thank you.

**Heidi Ellsworth:** Thank you. And I want to thank everybody who listened today. These podcasts are on Roofers Coffee Shop under read, listen, watch. We continually have our Roofing Road Trips with Heidi Podcast, talking to experts in the industry, contractors. We just have fun listening and talking to the folks who really are bringing important things to this industry. So, thank you for listening, and we will see you next time. Thanks.



Heidi J. Ellsworth has worked in the roofing industry since 1993 and has held positions with Malarkey Roofing, Carlisle Construction Materials and EagleView Technologies. She is currently a partner with RoofersCoffeeShop® and owner of HJE Consulting.

Working with both RoofersCoffeeShop and HJE Consulting, she can focus on supporting overall marketing strategies, sales success and content development for companies and associations within the roofing industry.

With a passion for networking and win-win scenarios, she continues to provide consulting and progressive digital advertising opportunities for companies and associations building strong collaborations for business profitability and success.

Ellsworth is a contributor to *Professional Roofing and Western Roofing, Siding & Insulation* Magazine that focuses on marketing tactics for roofing contractors. She currently consults with the National Roofing Contractors Association and the Roofing Alliance while serving on the boards of Western States Roofing Contractors Association, Roofing Technology Think Tank (RT3) and National Women in Roofing (NWIR) which she is a founder.



Adam Oaks is CEO at Estimating Edge, he has more than 25 years of leadership experience and has held various executive positions ranging from start-up to mid-market ventures within construction and manufacturing software and data solutions. Prior to Estimating Edge, he was a partner at TechCXO, which provides on-demand executive services to both start-up and high-growth companies. Oaks was also an Aviation Officer in the U.S. Army prior to joining the corporate world.