



December 22, 2020

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*Editor's note: The following is the transcript of an interview with John Lombardo and Jackie Hart from Estimating Edge.*

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## 5 Key Considerations When Choosing Estimating Software

**Announcer:** Welcome to Roofing Road Trips with Heidi. Explore the roofing industry through the eyes of a long-term professional within the trade. Listen for insights, interviews, and exciting news in the roofing industry today.

**Heidi Ellsworth:** Hello and welcome to another Roofing Road Trips from RoofersCoffeeShop. I'm Heidi Ellsworth and I'm a partner with RoofersCoffeeShop. And I am here today for this Roofing Road Trip podcast with two of my favorite people who I see all the time at the trade shows. Now, right now, we're not able to get to those trade shows. I'm lucky enough to be visiting with them this morning about sales. And my guest today is Jackie Hart with Estimating Edge, and John Lombardo, the director of sales for Estimating Edge. Good morning and welcome.

**Jackie Hart:** Good morning.

**John Lombardo:** Good morning, Heidi. Nice to speak with you today.

**Heidi Ellsworth:** You know, it's fun because I miss all my trade show road friends. We always

get together and see each other. And here we are having been home for a year. But at least we have some virtual reality and we can talk to each other and visit so. I'm excited for both of you to share your story and your wisdom about sales overall. I mean, I know you're with the leading Estimating Edge software, which in its own right is just amazing and does so much for the roofing industry. But when we really talk about sales, you two lead the way.

**Heidi Ellsworth:** So I want to start out first with some introductions. Jackie, can you kind of share who you are, your history, history with Estimating Edge? Just give us kind of that elevator speech.

**Jackie Hart:** Sure. Thank you, Heidi. And thank you for asking me to join us this morning. I really appreciate it. So yeah, my name is Jackie Hart. I am the Midwest regional sales rep for the Estimating Edge. I've got a little over four years with the company in sales, consultative sales that would be. I have been selling software in the construction industry for about 23 years. And in that capacity, I've done a lot. I've sold CRM, point-of-sale service and warranty, legacy integration

with a lot of back office emphasis and blessed to be selling the takeoff and estimating solutions.

Today, along with job site project management and time tracking as well. We're really excited about that. But I would say my biggest secret with the EDGE is that after I interviewed with this amazing team, I walked away and I would have I would have accepted that job had they said, "Listen, we really want you to work with us, but we're not going to pay you anything." I just tell them that six months after the fact. They're like, "Oh, well, we can redo your contract." I'm like, "No, no, no. That's okay."

But the reason was that I fell in love with the culture at the EDGE because we really are a family. And you don't find a lot today particularly in software companies because there's so much turnover and it's just such a fast-moving target. I embrace that so much because, again, we are a strong family culture, not that we're family-owned, but we act and behave like a family. And I think that makes us super unique and I'm very blessed to have my job.

**Heidi Ellsworth:** Wow. I love it. That is a great intro. You never want to tell anybody that you're going to work for free, but you know might.

**Jackie Hart:** No. Yeah, yeah, yep, yep.

**Heidi Ellsworth:** I love it. Well, okay, John, I can't wait. Share with us a little bit about you.

**John Lombardo:** Well, I've been with the EDGE for so long I forget what it was like in the very beginning. But I started in 1990 as an EDGE representative for the Southeast United States. And over the years I stayed in that position because I just love working with people and to give the customers that are looking for software or just looking for support, I love to give them answers and give them solutions, and try to listen to their problems. It's just fun.

Since I started in 1990, I've learned to work with so many different contractors and the experience that you receive from them, it's just incredible. It's just nothing I can explain to people until you've

been through it. But anyway, I've been through the EDGE, learn different trades. I've done a lot of trade shows through the years and this pandemic has really forced us to change the way we do things, but we've learned to do it better. And I think when this thing settles down, I think we'll even be stronger than before. With that said, I just love my job. I just love my job.

**Heidi Ellsworth:** We are going to do things better going forward. I think we all can see that already. It's not going to be just going back to the old normal, it's going to be creating a new normal with a lot of lessons learned. John, I'm going to ask you to kind of keep going because you really opened the door about how much you love working with the contractors and how much you've learned.

Can you share, I kind of want to go through the process of roofing contractors and their journey on getting the right software for their business. And like Jackie said, that consultative sell. That is just so important. What is important for or why is it important for roofing contractors kind of to take the time and review what they have right now? Just really being honest about where they're at with their processes and their software and how do you help them through that?

**John Lombardo:** Well, our job is to take what they're working with, to take what they're communicating over the phone or in-person, and try to be in their world and understand what they're facing, the problems or the good things. Whatever the case is, we have to sit there and analyze what they're trying to do. And a lot of them can communicate it well. And some of them can't communicate it very well as well.

It's kind of you've got to have your open ears open and listen and try to understand what their position is all about to try to give them the answers that they think they want, but they may not know what they want. It's a difficult thing, but they have to have the trust that we understand what they're trying to do.

**Heidi Ellsworth:** Yeah. My background is coming from marketing and I've always found that a lot

of the contractors, especially the established contractors are contractors because there are wonderful craftsmen and women. And they may not know as much about marketing or they may not know about technology as this technology grows. It's so important to be able to kind of help them through that analysis of kind of where they're at.

**Jackie Hart:** Yeah. And I want to say also that as I go through that analysis and have that conversation, that preliminary conversation with a company, and then we go into a presentation and the presentation is really overlapping what they do today. Step by step by step by step. It's like, we take them through that. And I like to call it an aha moment. They have an aha moment where like John said, sometimes they really don't know what they're looking for because like all of us, they don't know where their dysfunction is. They've done it so long, they got up every day, they do the same thing. They don't know that there's a solution or an opportunity out there to do it better, quicker, faster, more efficiently until someone actually guides them through the process.

And I believe once they have that aha moment, it's like us. If somebody kind of helps us point out, "Hey, you got this little thing going on over here." Once you realize that, there's no turning back. Doesn't mean you're ready to deal with it, but it means that it's sitting somewhere on a shelf and it's just brewing. It's just sitting there. And I truly believe that through a consultative sales solution particularly in software, once you get your customers through several of those collective aha moments, that's when they say, "Wow, I really need to do this thing because I can see how this is really going to benefit me." And I think that's so important. Because that's the value. That's the value.

**Heidi Ellsworth:** Yeah, that's the value. And Jackie, keep going on that train of thought. Because I'm really curious once that aha moment happens and you're ready to kind of start figuring out the software and integrating it, what are

some of the most important things that you talk to or visit with the contractors about during that transition of adopting new technology or upgrades?

**Jackie Hart:** I think one of commonalities between all of our trades, all of them, all of the contractors is, like you said at the beginning, they're great at what they do. They do something very specifically, uniquely. They're not in marketing. They do something different. It is important internally that they appoint a champion. Someone who's going to own the relationship with us, own the transition from what they're doing today to where they want to be. Own that what we call onboarding implementation and ongoing relationship building with us.

Because if you don't have an owner of this, a stakeholder like you do every other area in your company, it is bound to fail. Because at the end of the day, we all have other jobs that we have to do full-time. And now you're bringing in software, which is a full-time implementation. I mean, to set expectations correctly, this is not an overnight sensation. Because building out their takeoff and estimating processes tied to their accounting and their job site and everything else, that didn't happen overnight either.

I think it's super important that they acknowledge and we find that champion. And sometimes it's more than one person that we bring on board and work with. John, do you agree?

**John Lombardo:** I totally agree, Jackie. You touched all the points that I would have touched upon. Absolutely correct. Yep.

**Heidi Ellsworth:** John and Jackie, but John, one of the things too to go along with what Jackie just talked about is and I always hear this from the contractors is culture. Like how the ability you find that hero, that those people, Jackie, who are going to really be the advocates, but then how do you adopt the software into maybe a culture that's not very technology-oriented?

John, I mean, I know when you said you have been selling software since the 1990s. You've seen everything with the adoption and how important culture is. What do you think? How do you help work with them on that?

**John Lombardo:** Well, I'll go back. When I first started with the EDGE years ago, we used to meet with the contractor, show them the demonstration, then we go back and actually work with them on getting it set up. We actually took it from the beginning to the end. We did the training. Today, we're really blessed with awesome trainers that do their work better.

So overall, training is the key. You got to take ownership of the software. You have to get training. You have to be taught on how to use a correctly. And once you get past that, it's just a matter of making a phone call to get support. I hope I give you the-

**Heidi Ellsworth:** Yeah. No, I think that's it. Then I think when you give the people in the company from the rooftop to the back office to the front office the right training, then culturally the software seeps into the culture of that company. Without training, it just becomes a battle all the time. Jackie, I want to kind of take what you and John had been doing so successfully with the EDGE in consultative. And I'd love for you to share some of your words of wisdom with contractors out there right now on their consultative sells.

Because they have building owners who they're doing negotiated long-term work with. You have contractors that you've been working with for years and waiting for that right moment of when you can really help them and when they need. So can you share you? Shared some great stuff with me earlier. I'd love for you to share that with the contractors.

**Jackie Hart:** Sure. Thank you. So I again, I use the word blessed a lot because I think our lives are a series of blessings and events that take place. And I was blessed with a sales trainer years ago who taught me a very simple concept of what's called an ideal customer profile, which

equals fit and need. And the simplest way that I've ever used. It was literally I have five questions and each question has a score of one through five. And I asked those questions when I first started to work with a customer. And I add up the points that I assigned to each one of the questions. And if they have a score better than 60, they pass. If they have a score less than 60, they fail. Failing meaning maybe not right now today. Are they ready?

It's all about fit and need. It's as simple as that. And when I talk to our customers, I talk about, "Are you a good fit and do you have need?" Because need is a moving target. Need to be today, but it could be in three years from now. And I think that's a super important piece of information to share with our contractors. Because when they do business, whether it be negotiated work or other is when they are approached about that work. "Okay, is this client a good fit for me? Is this project a good fit for me? Does it meet my sweet spot and what I usually go after in my business model? And do they have a need for my kind of service and my product?"

And if they stay true to themselves in that, they will find that they'll have far more wins, far more successes, probably lose a lot less on a job because they're not going to have to give as much. Because this customer wasn't a good fit and that the project wasn't ... They didn't have a need for my kind of service. They'll find that they'll do better at the end of the exercise over and over and over again.

But then everything else they do will fall into place, right? Their marketing, their relationship, building, the teams that they amass in their own organization and the culture that they build is all going to be about who is our ideal customer profile? And let's go after those people that are a good fit and have a need for what we can deliver. I think super important, again, in no matter what you sell. It doesn't matter. It's fits every area of business.

**Heidi Ellsworth:** Yeah.

**John Lombardo:** And I'd like to add to that. It's almost like when you talk about culture, it's like they're interviewing us as well as we're interviewing them. And we don't want to be the wrong fit for them. We're going to try to figure out, are we a good fit in the front end of this communication? For sure.

**Heidi Ellsworth:** Yeah. One of the things I've found in the roofing industry and I think it's everywhere. It's human nature. But there's a long memory. When things don't work and you're kind of almost put in the penalty box for a while or a long memory of, "Oh, that didn't work." And so I just love this concept of making sure the fit and the timing is right. Because the timing could be right two years from now. And I think that's so true across the board. I've had the same experiences.

**John Lombardo:** I was just going to say and all companies go through a cycle. If you think of a product life cycle, companies go through a company life cycle. They're either going up or they're going down the curve. So where do they fit with what they're trying to do in this curve? The bell curve, I guess they call it, right?

**Heidi Ellsworth:** Yeah. And where you fit in that bell curve.

**John Lombardo:** Exactly.

**Heidi Ellsworth:** Right, Jackie?

**Jackie Hart:** Yeah, absolutely. And when we all don't sell to the right company and they end up purchasing our services, it's a painful, hard experience for both, both companies coming together, as well as have you ever tried to fire a customer? It's very difficult to fire a customer because that's a whole, "Wait a minute, I'm your customer. I'm paying you for your services and you want to fire me?" But sometimes customers end up costing us so much money, but they also cost the culture. They cost the people that we've built internally at the EDGE.

I talked about us being a family at the very beginning. We are family. We take her one

another. We all say as a customer; your success is our success. But when you have a customer that you sold to that doesn't meet the company culture, it's painful throughout the entire process. And I think we probably all in business experience that at one time or another knowing I shouldn't have sold to you. I shouldn't have sold you and now I'm paying the piper for it.

**Heidi Ellsworth:** Right. Oh yeah. I've been there.

**Jackie Hart:** I think we all have.

**Heidi Ellsworth:** I know. Well, so kind of taking that one step further is and John, I love that the company life cycle and when is the right time. I know you have relationships that have grown. You just have so many relationships throughout the years. Can you talk a little bit about how you get involved with the industry and with roofing overall? And I know it's not just roofing. You also work with other areas. So kind of share how you get involved that way.

**John Lombardo:** Well, I will say this upfront that my relationships have been incredible from the point of a father wanting his son to get into an automated estimating, wants his son to learn the roofing knowledge, because he can't teach it to him in three months. He needs 10 years. All of these things, you kind of understand because the solution is good for many different situations. You know what I mean?

**Heidi Ellsworth:** Mm-hmm (affirmative).

**John Lombardo:** So the point of this is that I have met companies in the garage. I've met companies in the kitchen table. I met companies at big, large corporations and they all just want to work with somebody that understands their problems. And once you do, the relationship is almost like establishing a relationship with a buddy that you met at a trade show that now you guys fish every year because you enjoy being together.

That's how we are with our clients. We can't wait to go to trade shows, not only just to sell, to meet new people, but we love to see our customers.

And that's important.

**Heidi Ellsworth:** I know that I've had people as I've been sitting in the booth at the Estimating Edge, people coming by. "Is John here? Is John here? Where's John? Where's Jackie?" They're looking for you. I've seen it myself so. But Jackie, you are super involved. And you and I have met through National Women in Roofing with passion. I love that. And also, you're super involved with the Chicago Roofing Contractors Association.

Can you talk a little bit about that, about being involved with these organizations and how important it is?

**Jackie Hart:** Sure, absolutely. Well, I too am as passionate about National Women in Roofing as you are, Heidi. Well, back three years ago, I guess I sought after starting the South Florida Women in Roofing chapter because I felt it was so important. Again, 23 years in this industry, I used to walk into boardrooms where there were just a whole bunch of suits in there. And I was the only woman. And because I had a guy standing next to me who happened to be the technical side of what I was selling, they would never look at me. They would only look at the guy. Because why? I was a woman. How could I possibly be doing what I'm doing?

That said, when National Women in Roofing came across my desk, I was so passionate about helping an organization that could open up the doorways for other women like my two daughters. Who knows? Maybe they want to go into construction. Now those paths and those doorways have opened because of the hard efforts of folks, people like you and I. I was a founding member of South Florida Women in Roofing. I still sit on the board there today. I'm on two committees of women in roofing, the Council's Committee and the Membership Committee. And this year I was blessed to join on with the Chicago Roofing Contractors Association, their membership committee as well.

Because I think it's so important to give back to the organizations that support us, that are there

for us every day all the time. And because I reside in Florida and the Midwest is my territory, which is a little unusual. I want to be as involved as I can and help in any way that I can. And there's a lot we can do. Like you said, the new normal today for a lot of us is this virtual remote. It's something that I'm used to doing. For me to be able to take on different roles and different hats to support these committees, again, I feel blessed and I'm honored to be a part of it. It's really important to me.

**Heidi Ellsworth:** It's exactly how I feel. And I love being involved in giving back. I love this industry so much. Towards the end of this podcast, what I'd really love to do too and you kind of started out Jackie at the very beginning talking about some of the new things that are coming your way with the EDGE on timekeeping, some different things.

Can you kind of share some of the cool new stuff that's going to be happening in 2021 and just overall with Estimate Edge, but also just overall where you see things going in the industry with all the changes that have been going on?

**Jackie Hart:** Wow. Okay. I'll start with the changes in the industry first, because I'm going to defer a lot of the first question to John. I think we've all said that, we've alluded to it in our conversation here this morning that there is a new norm that's going on. And what I see is for kind of a veteran like myself and John having worked remotely for many years leveraging webinars for over 20 years when a lot of people didn't even know what a webinar was. And you had to kind of first educate them on how to log into a GoToMeeting or a WebEx or whatever, Mic Teams, whatever it is you're using, whatever platform. You had to educate them there and get them through that hurdle.

Well, the majority of us today are extremely comfortable with that because that's how we've been conducting business. But at the same time, I think we've had to sharpen our communication skills. And like John said at the beginning, you have to listen. You can't talk the whole time,

although I love to as a salesperson, I admit it. But you have to listen. You do have to listen to what they're saying, because there's value, there's nuggets in-between the words that they're speaking. And I think again that that's transposed itself, not just to the roofing industry, but to everything we're doing.

I think all of us have probably had those family virtual happy hours and those get-togethers. And the first few you have, everybody's talking at the same time because that's the normal dysfunction that happens when you all get together every so often. But I think in that, there's been a learning experience for those people who never did it a lot in business. Now you're getting together as a family. You've had to learn how to communicate differently and not lose the passion that someone feels when they're face-to-face with you. That's the thing that we lose is that passion, that aura, that culture that's more easily built when you're sitting across the table from somebody. Because somebody can feel physically if you're a good fit for them and their team and their company. I think that's super important.

The second question you asked or the first question you asked rather was where's The EDGE going in 2021 and a new product? I'm going to defer to John, but the only thing I will say is our EDGE On Time product that most recently made its debut. It's like our little star that's going to just shoot that home run, man. This piece of software is so simple to use, seriously. So incredibly easy, but so incredibly powerful.

It's like the tail that wags the dog. It's like, which came first, the chicken or the egg? I mean, it's an incredible piece of software that just brings The EDGE completely full circle. It's just unbelievable so. I am so excited. Can't wait to show it. Can't wait to be at a trade show. We don't need to be at a trade show to sell it, but I can't wait to see people's reactions when they see this piece of software. I'm super, super excited about it. John, now it's all yours.

**Heidi Ellsworth:** We're going to have that, all that information on RoofersCoffeeShop too so people can see it all the time. John, tell us more

about ... I mean, I'm excited. Tell us about it and anything else. All the other fun, new stuff you have up your sleeve for 2021.

**John Lombardo:** That's going to be difficult to say in a podcast and I've got to be careful about some of the secrets that we can't release yet. But I could say that the cloud is becoming more and more demanding, more and more important. It allows us to deliver better product, better service to our clients going to the future. 2021 will boom in the cloud. Boom. And one of the things that I like about The EDGE is that we're always looking for better ways to make life easier for the contractor in the estimating world.

Now we've learned how to fit into other aspects of their business-like Jackie was talking about. Time tracking, project management, timekeeping, all that stuff. Now we're going to be embarking in other areas like something called Smart Takeoff. And what Smart Takeoff is going to allow the contractor to do in essence is to save more time with building an estimate. That will transpose to more modern ideas like God only knows what robots are going to be doing for us in the field.

We have vendor quoting. It's going to give clients to be able to compare pricing by multiple vendors. We have integrations to different ERPs, CRMs. We can do it through the cloud much easier than the old way. Integrations to accounting software. All of these things, we're there, we're there. And our pathway is nothing but positive. Right, Jackie?

**Jackie Hart:** Oh, absolutely. Absolutely. And just to drive home again, I think a message that we also think about is while we have this plethora of product, so it's really from cradle to grave now in terms of everything the EDGE can help our contractors with. We don't sell it all right out of the box because it is crawl, walk, run, and that's understanding our customers. Understanding the pace with which they can move through, a change in all their processes. I don't want the last messaging for anybody listening to this to be like, "Oh my gosh. If I call them, they're going to sell me all this stuff and I'm going to have to change everything."

No, no, no, no, no, no, no, no, no. In fact, quite the opposite. It's crawl, walk, run. And sometimes we push our customers back and say, "No, you kind of have to hold back on that a little bit. Let's just wait and take it slow." I think that speaks to the culmination of a lot of your questioning about how we do things, what's right, what recommendations do you make to your customers about how to implement the software? It's really understanding their needs, understanding how they're going to migrate to the change and making the right recommendation for them.

**Heidi Ellsworth:** You know, that was going to be my last question. So that is absolutely perfect, Jackie. You're right on it. Because that's what I wanted to say is and maybe John, you can just add to what Jackie said. But how do those contractors, how are roofing contractors out there knowing when it's the right time and it's the right product for what they need? Because I agree if you do too much too fast, it can be disastrous. You got to put it in the right place. So maybe finish us with that thought.

**John Lombardo:** Well, I just relate it to when you buy a house. You don't buy everything at once. You kind of start feeling internally what's next? Do I start with the living room? Do I start with the kitchen? And things just start to develop. That's kind the way I think our software is purchased. For example, taper. If somebody wants to do their own taper, we have a solution. If they don't want to do it, they can get it from their vendors. We have a tapered insulation solution, but know when they need it. They know when they'll need it. Right, Jackie?

**Jackie Hart:** Absolutely. They do. I mean, I think our job is to inform them of everything we have. And sometimes even at the beginning, it's not informing them of everything they have because you give them too many options it becomes too overwhelming. And that's part of our job is to listen to what they're telling us and to sum it all up, and kind of push it back down and funnel it out in a way that's going to resonate for them based on what they're telling us their needs are

in-between the messaging and the words. We just let them know what we have.

**Heidi Ellsworth:** What do they always say to salespeople? You have two ears and one mouth? [inaudible 00:30:22]

**Jackie Hart:** I have to tell you, you all can't see me on this, but there are times and I kid you not when I'm not face-to-face where the cameras are off, I will literally put my fingers over my lips so I don't talk. Because the worse thing a salesperson could do is interrupt somebody and that holds true to everybody. When they're finally talking themselves into buying from you, the salesperson opens their mouth and blows up. I will. I'll hold my lips together so I can't talk.

**Heidi Ellsworth:** Me too. I love it. I love it. Well, I have to tell you, I see so many words of wisdom here today from how contractors should use a lot of these same consultative sales techniques with their customers. But also knowing that you have people who are going to listen to you and are ready to visit about building your business with the right software and the right technology. John, I love the robots. I know they're coming. It's just a matter and I'm sure the EDGE will be ready with them already in the estimate. We'll be all good to go.

**John Lombardo:** And I just want to close out and say as much as we need clients, clients need us. It's a team effort. We all need each other. And we're going to grow together and we're going to prosper together. And it's that relationship that lasts forever.

**Heidi Ellsworth:** Yeah. There's nothing better than a win-win win.

**John Lombardo:** Exactly.

**Jackie Hart:** Absolutely.

**Heidi Ellsworth:** Love it. Well, thank you both so much for being here today for visiting with me and sharing your wisdom. I do want to tell all of our listeners that you can find the Estimating Edge and all of their materials, their thought leadership on how to use, how to select software

all on RoofersCoffeeShop. So be sure to go to their directory, check out the eBooks. They just do some amazing things and you can also find John and Jackie on RoofersCoffeeShop. They'll be right there on this podcast. Thank you again, John and Jackie for being here today.

**John Lombardo:** Thank you, Heidi.

**Jackie Hart:** Thank you, Heidi. Thanks for having us. We really appreciate it.

**Heidi Ellsworth:** Thank you and thank you everyone for listening. Please be sure to subscribe to your favorite podcast channel so that you get every podcast that comes out as our podcast of the week. You'll be able to find everyone under our Read Listen Watch initiative in that section of the RoofersCoffeeShop.com. Thank you so much and have a great day.

## About our guests



is the Midwest Regional Sales Manager at the Estimating Edge and has worked for more than 4 years serving 10 different states. Over Jackie's career, she has worked in the construction industry specializing in software sales and consulting in many areas – from estimating and field production management, CRM and point of sale, service and warranty, accounting integration, and more.

For the past 20 years, Jackie has participated in a number of technology panels and has been published in a variety of construction journals. She is also a founding member and current board member of the South Florida Women in Roofing Council and serves on the committee for National Women in Roofing. Additionally, she is committee member for the Chicago Roofing Contractors Association.



John Lombardo has been with Estimating Edge for over 30 years and has been in multiple departments including sales, training, and technical support. His strength is taking care of the customer and ensuring that they are confident in using the software and satisfied as an EDGE user. Over the years, his customers have raved about his passion for his customers and their business success.