The Complete Roofing Solution: From Specification to Service

Best Practice Solutions

Success in the roofing industry isn't just about crafting top-notch systems;
it's about building strong connections with contractors, architects, and building owners.
The challenge lies in juggling everything—from snagging fresh leads to navigating warranty claims —
while ensuring operational efficiency. To stay competitive, you need tools that optimize
every stage of the roofing lifecycle and drive long-term business growth.

Find the Roof:
Capture New Projects Early

Timing is everything in roofing—securing a spot in the specification before the project begins gives you an edge. Identifying and qualifying new construction projects through platforms like Dodge, Construct-Connect, or your own channels is critical for staying ahead of the competition.

Integrating **SpecSuccess**, our custom-built tool for automating engagement with architects and roofing consultants, alongside Salesforce's Sales Cloud, lets your team easily capture project leads as they emerge. With SpecSuccess taking care of outreach, your products shine just when needed, while Sales Cloud keeps all your leads neatly organized. That means your team can ditch the follow-up frenzy and spend more time building connections — and closing deals!
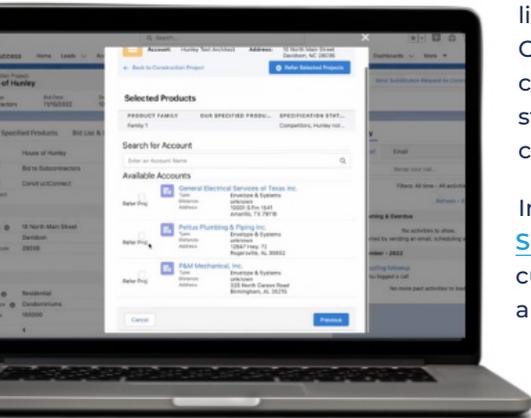
Win the Roof:
Streamline Configurations & Quotes

After being specified, the next hurdle is winning the roof. This typically involves configuring complex roofing systems, generating quotes, and securing design approvals—tasks that can be time-consuming and cumbersome for contractors.
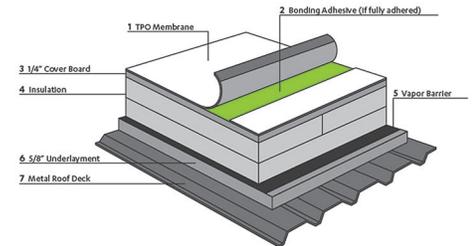
What if contractors could quickly generate accurate quotes and access all necessary documents, from warranty registration to pricing information? Salesforce CPQ speeds up the buying process while empowering your contractors with the tools they need to proceed confidently—without cutting into your profit margins.

Warrant the Roof:
Handle Claims Seamlessly

Once the roof is installed, maintaining the relationship is key, especially if you offer long-term warranties. Managing warranty claims efficiently is crucial for keeping customers satisfied. When issues like leaks arise, contractors and building owners expect quick solutions.

With Salesforce's Service Cloud and Field Service, you can automate service requests, assign technicians, and monitor progress. These tools help you quickly respond to warranty claims and ensure the right technician is dispatched to handle the job. At the end of the day, safeguarding your brand, elevating customer satisfaction, and building trust for future business opportunities is the most important move you can make.

Win the Reroof: Keep Roof Data Updated

Roofs may last 15, 20, or even 30 years, but so much can change in that time—new ownership, evolving property management, and shifting roofing needs. Keeping tabs on these changes is important for landing reroof projects and maintaining strong connections with building owners long after the initial installation.

Now, you can maintain up-to-date records on every roof you install with MuleSoft and Salesforce Data Cloud. Tracking details like roof condition, ownership changes, and service history gives you the ability to predict when a reroof will be needed. This proactive approach keeps you at the top of your mind with customers when reroofing projects arise, helping you win the business before competitors.

Build Loyalty with Contractors & Building Owners

Strong, ongoing relationships with contractors and building owners are the backbone of your business. Contractors appreciate simplicity, and building owners want easy access to project information without unnecessary hassle.

Salesforce Experience Cloud helps by providing a self-service portal for contractors and building owners. Contractors can easily register warranties, request service, and track project information, while building owners can stay informed about maintenance and warranty claims. This easy self-service experience builds loyalty, and turns interactions into lasting partnerships, setting the stage for future projects—whether it's a new installation or reroofing.

With these tools, you can simplify each step of the process and set yourself up for success at every stage of the roofing lifecycle. Ready to discover how Salesforce can blow the roof off your current processes? Schedule some time with our experts today!

Boost Sales Efficiency With Salesforce

Now that you have a strategy in mind, here are the best Salesforce products that can help you make this vision a reality.

Service Cloud:
Automate service requests and manage warranty claims seamlessly to enhance customer satisfaction and build trust for future projects.

Sales Cloud:
Capture and organize project leads efficiently, allowing your team to focus on building connections and closing deals.

Experience Cloud:
Provide a self-service portal for contractors and building owners to streamline warranty registrations, service requests, and project tracking.

Data Cloud/AI:
Contributes by providing intelligent insights, predictive analytics, and data-driven decision-making capabilities, enhancing overall efficiency and project outcomes.

By integrating departments and fostering a no-silo approach, you create an environment of digital transformation. A smooth, data-driven sales process doesn't just enhance your sales team's performance — it's a game-changer for your entire business.

Transformation Starts Here

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