



A Roofer's *Ultimate* Guide to Marketing

Your **actionable marketing blueprint** to get found and chosen by homeowners in your area.

LET'S GET STARTED

The roofing industry is changing *fast*.

Homeowners expect quick responses, transparent pricing, and proof of quality before they ever pick up the phone.

The good news?

With the right marketing plan in place, you can meet – nay, **exceed!** – those expectations, and win more work, without working 80 hours a week.

This ebook is full of actionable, real-world strategies that are made for roofing business owners trying to boost their marketing efforts, or for those just getting started.



We get that you're a roofer.

Marketing may not be your forte, and that's why we wrote this guide.

It's full of approachable and doable marketing strategies made for roofing business owners who want to boost their marketing efforts or who are just getting started. Wherever your roofing business is, and whatever marketing experience you have, this marketing guide can help.

This playbook is for roofers ready to:

- Stop chasing leads and start building a foundation.
- Stand out from competitors in a crowded market.
- Use modern tools to generate and manage leads.
- Build a predictable pipeline that keeps jobs flowing.



What you'll get from this guide:

- Every major marketing tactic and why they matter.
- Templates to take away the guesswork.
- Examples and best practices.
- A 30-day action plan to get you started.
- AI prompts to help you with each channel.
- A glossary of common marketing language.

Every section includes checklists, templates, and examples. We'll cover everything from text message marketing to branding, websites to social media ads. Plus, how to leverage Roofr's tools to make all this easy. Think of this as your marketing blueprint. That leaves you to focus on running jobs, growing your crew, and delivering the kind of work that makes your name the one on every homeowner's mind.

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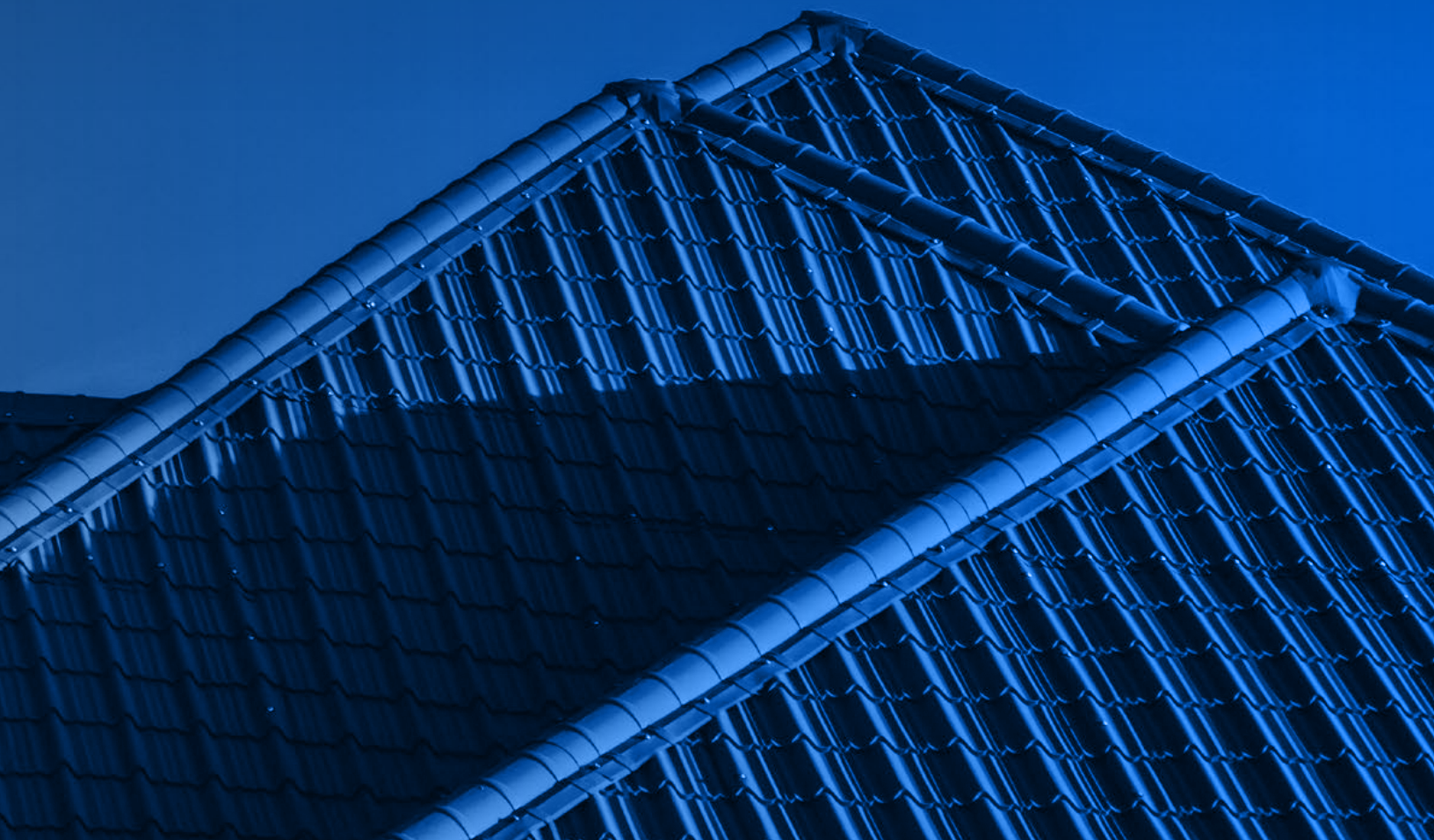
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Marketing 101

Too many roofers throw cash at postcards, random ads, or Facebook boosts, hoping something sticks. That “spray and pray” approach might land one job... but most of the time, without a thoughtful strategy, it’s just burning money.



Roofing isn't a one-size-fits-all purchase.

Your ideal customer has a specific budget, set of needs, and buying timeline. When you market to everyone, you dilute your message and make it harder to stand out. When you market with precision, you talk to the homeowners most likely to hire you. And if you do it right, they listen.

Knowing your customer = more jobs

The best marketing speaks to the right homeowner at the right time.

Ask yourself:

- What's the average home value in my target neighborhood?
- Are most roofs 10 years old, or 25?
- Do these folks care most about price, speed, or high-quality materials?
- Do they answer texts, emails, or only phone calls?

You don't need a big marketing budget to find valuable data.

Where to find stats and data on your local demographic.

Check out:

- **U.S. Census Bureau** — for homeowner age, income, and household size.
- **Local property appraiser websites** — for roof age and property values.
- **Your own CRM data** — for which neighborhoods and lead sources have closed most jobs.



Timing is everything in roofing.

Being smart about what marketing tactics you use (and when)

Storm season? Use storm-response ads, door knocking, and local radio.

Slow season? Run maintenance promos, follow up with past customers, and share helpful content.

Busy season? Focus on high-value jobs and referrals instead of chasing every lead.

Starting a roofing business?

Nail the basics first.

Get these credibility boosters in place:



A clean logo and consistent colors
consistent visuals build recognition.



A basic, clean website
even one page can start generating leads.



A short, memorable slogan
that shows what makes you different.



Active Facebook & Instagram pages
photos of your work > fancy captions.



A professional business email
"@yourcompany.com" builds trust.



A free Google Business Profile
so homeowners can easily find you.

Branding

Branding is more than a logo. It's the promise you make to homeowners. In a competitive roofing market, strong branding is what makes someone choose you over the guy down the street with the cheaper price.



Stand out so they remember you.

From the colors of your trucks, to the design of your proposals, to how your crew interacts with neighbors, branding proves your professionalism.

It builds trust before a single shingle is nailed. Consistent visuals, clear messaging, and top-notch customer experiences signal reliability. That's what homeowners weigh heavily when picking a contractor.



Meet Ben.

Ben "Tiger" Morrow has taken his tiger branding to a whole new level, with tiger stripes on his truck, shirts, logo, and all over his social media. He's expanded his Big Cat roofing with the start of Solar Panther.

"Invest in long term brand building and you won't waste another dollar chasing lead purchasers that pervade inside of our industry."

-Ben Morrow

Branding should show up at **every stage** of your customer journey.

Branding is a game-changer for:

- Standing out in a crowded market.
- Making a lasting impression.
- Helping homeowners remember your name.
- Building trust through reviews, certifications, and years in business.

Where it fits in your funnel:

The sales funnel is also known as the “*customer journey*.” It’s the path someone takes from first learning about your company to being your biggest fan.

- **Top of funnel** — ads, website, and social media
- **Middle of funnel** — proposals, email/SMS follow-ups, and estimate appointments
- **Bottom of funnel** — on the job, crew uniforms, branded paperwork, and post-job thank-yous



BRANDING BASICS | THE 3 PS

PROMISE

What you stand for
(“*We deliver fast quotes, fair pricing, and clean jobsites*”).

PROOF

Reviews, years in business, manufacturer certifications, project photos.

PERSONALITY

The tone and style you use in all communications.

Compliance basics

1. Do a trademark check before finalizing your logo, slogan, or brand name.
2. Check if [yourbrandname].com is available, or there’s a version of it to use.
3. If not, consider a different name to avoid future confusion.
4. Google local competitors so your brand doesn’t look too similar.
5. Stick to consistent brand guidelines (colors, fonts, logo usage).
6. Apply these rules to ALL marketing and customer-facing materials.



VISUALS

- Logo usage rules
(spacing, scaling, and backgrounds).
- Color palette for all materials.
- Branded trucks, yard signs, crew uniforms, and printed materials.

MESSAGING TOOLKIT

- **One-liner:** “[Company] replaces and repairs roofs in [City] with fast quotes, fair pricing, and clean jobsites.”
- **Three brand claims:** Speed, Trust, Quality (or swap for whatever most sets you apart).
- **Proof elements:** Review rating, years in business, and customer testimonials.



Want AI prompts to help you?



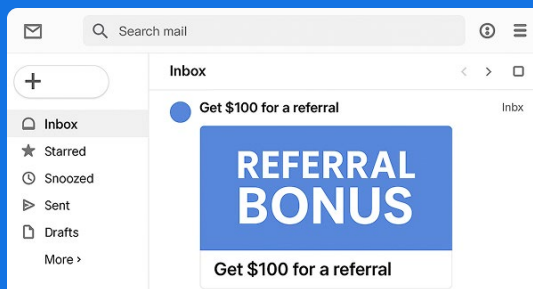
Find them at the end of the ebook, [here](#).

NEIGHBORHOOD PRESENCE

- Yard sign standard operating procedure (SOP).
- Neighbor mailers or door hangers after jobs.
- Canvassing scripts for post-storm outreach.
- Claim or update your Nextdoor business listing.

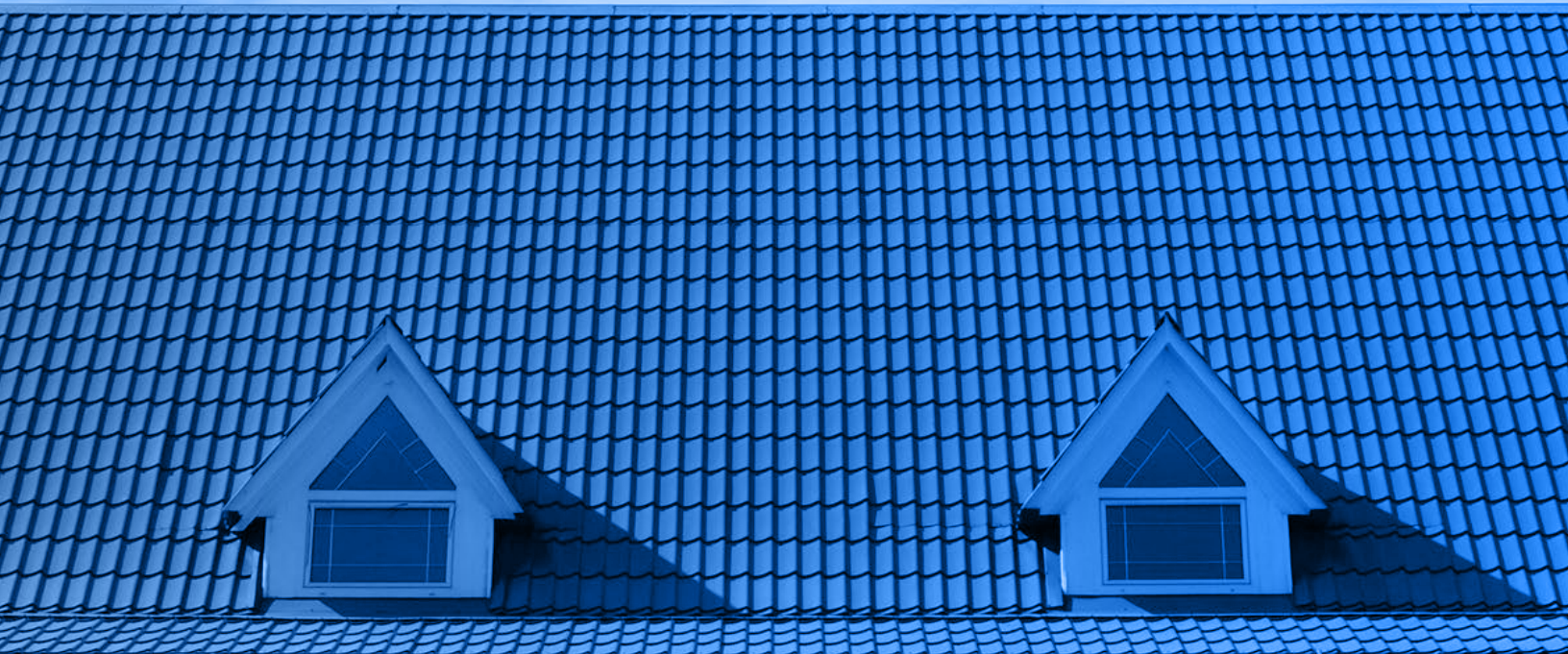


- Use your brand assets (logo, colors, tagline) on proposals, emails, texts, and other documents.
- Standardize canned replies that work, so every customer gets the same professional tone and message.
- Create a Referral Program automation that sends branded follow-ups with your offer.



Website best practices

According to the Roofing by the Numbers 2025 report, most U.S. homeowners research at least two contractors online before reaching out. That means your site needs to impress fast. It should show customers you're credible, professional, and easy to reach.



A clear, **trustworthy** site can be the deciding factor between getting the call... or losing it to a competitor.

For many homeowners, it's the first interaction they have with your business — usually even before they see a yard sign or talk to you on the phone.

Roofers, a strong website is a game-changer for:

- Turning casual browsers into qualified leads with simple calls to action.
- Building instant trust through reviews, certifications, and proof of work.
- Speeding up sales with tools like the Instant Estimator right on your homepage.
- Capturing leads 24/7 with mobile-friendly forms.
- Standing out by showcasing neighborhood projects and testimonials.

Where it fits in your funnel:

Your website is the **top** of your funnel:

- **Entry point for leads** — through search engines, ads, referrals, social media.
- **Instant Estimator driver** — turns visitors into price-aware prospects in under a minute.
- **Booking catalyst** — makes it easy to go from interest to appointment.



**Your website
is your 24/7
salesperson.**

Compliance basics

1. Meet ADA compliance with readable fonts, alt text, and keyboard navigation.
2. Publish a privacy policy that explains how you use personal data.
3. Add cookie consent if you track analytics or run retargeting ads.

Homepage checklist

- ☐ **Clear headline** — Include your city & service (“Roof Replacement & Repair in Springfield, MO”)
- ☐ **One-line value statement** — Why choose you? (“Fast quotes, fair pricing, and clean jobsites.”)
- ☐ **Primary CTA** — A big “Get an Instant Estimate” button above the fold
- ☐ **Trust elements** — BBB badge, manufacturer certifications, awards, review stars
- ☐ **Proof of work** — Before/after gallery and recent project photos
- ☐ **Service area pages** — Include a map and details about where you work
- ☐ **Social proof** — 2–3 short customer reviews with first names
- ☐ **Speed** — Compressed images, mobile-first design, sticky click-to-call button

Bonus tips

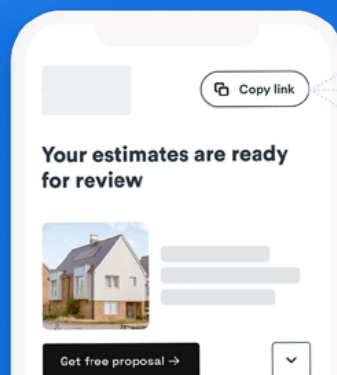
1. Create a Project Gallery page with before/after photos, proposal PDFs, and testimonial videos (with homeowner permission).
2. Add a seasonal Storm Center page with an IE link and same-day inspection booking form.
3. Update your homepage hero banner regularly with seasonal offers or storm updates.

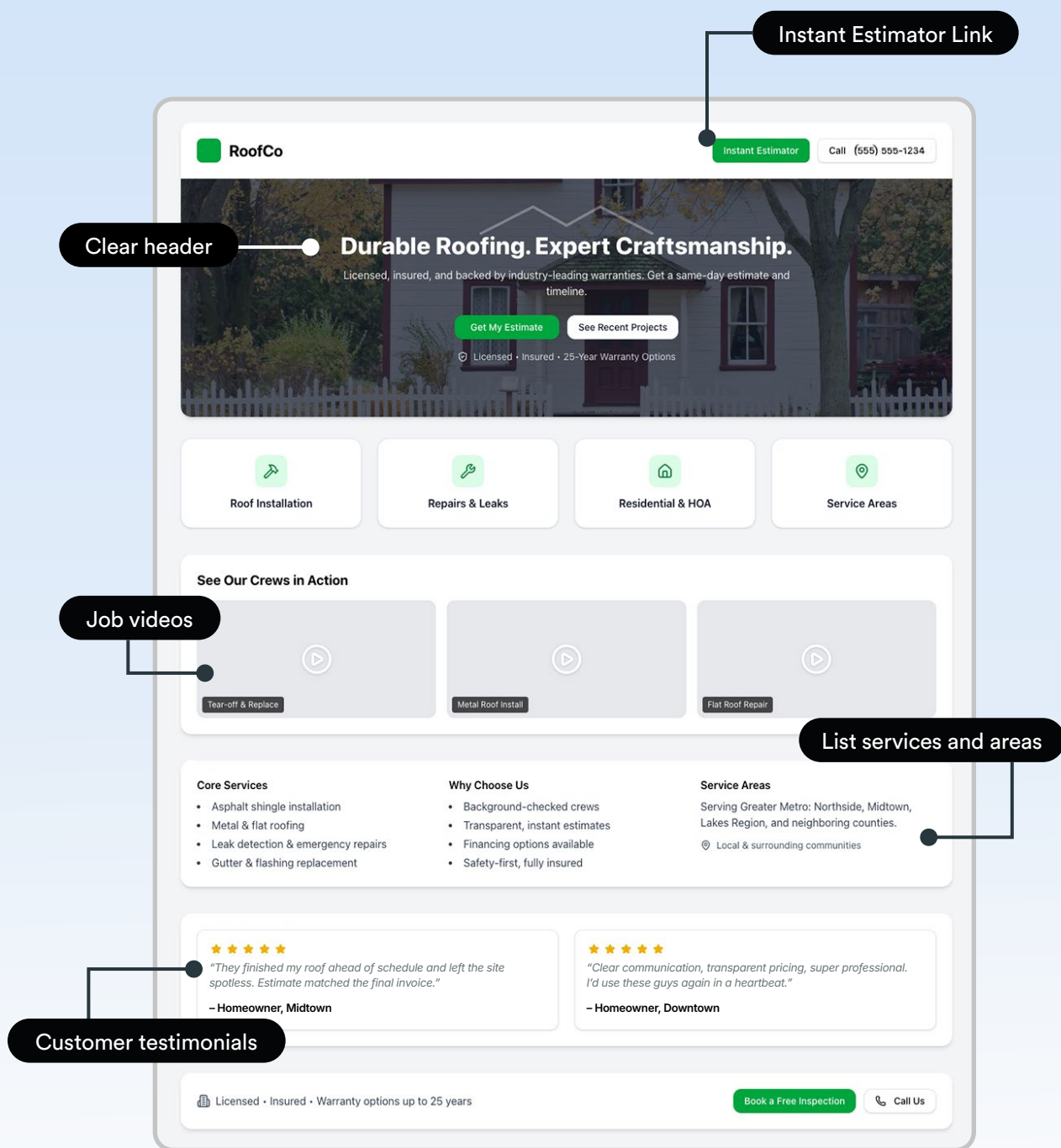
Conversion must-haves

- An **Instant Estimator (IE)** embed or button above the fold (don’t make users scroll to find it).
- A short, simple **contact form** (name, address, phone/email) with a consent checkbox.
- **Financing info** + timeline explainer, so homeowners know what happens next.



- Set up unique Instant Estimator links for each traffic source (homepage, Google Business Profile, Facebook Ads).
- Pipe form submissions right into Roofr CRM with source tags.
- Use Automations to trigger nurture emails/SMS right after form submission.
- Integrate Proposals and Payments so a lead can go from estimate to signed deal without ever leaving your Roofr Dashboard.
- Standardize canned replies so every customer gets the same professional tone and message.
- Create a Referral Program with automations to send branded follow-ups with your offer.





“ Use team photos and bios on your website. Homeowners trust faces they’ll actually see at their door and it’s the best way to build trust. ”

– Michael Stearns, Ascend Digital

Google Business Profile (GBP)

Your Google Business Profile is the free listing that shows up when someone searches for your company — or for “roofers near me” — on Google Search and Maps. It highlights your name, contact info, reviews, photos, and more.

Studies have found that people are **70% more likely to visit** and **50% more likely to consider purchasing** from businesses with a complete Google Business Profile.

That could be the difference between booking that job... or not. For anyone using Google, your GBP will be their first impression of your roofing company. A good profile can put you ahead of competitors before they even find your website.

Roofers, a Google Business Profile is a game-changer for:

- Showing up before big chains in local search.
- Building instant trust with reviews and photos.
- Driving calls, messages, and website clicks without ad spend.
- Tracking how homeowners find you through GBP Insights so you can learn what converts.

Where it fits in your funnel:

Your GBP is the **top** of your funnel:

- **Top of funnel** — shows up when homeowners are actively searching for roofing services in your area.
- **Mid funnel** — builds trust with reviews, photos, and business details before they call or click.
- **Bottom funnel** — lets people message, call, or request an estimate directly.



Compliance basics

1. Use your legal business name (skip keyword stuffing).
2. Keep your business hours accurate.
3. Only upload real photos you own the rights to.
4. Respond to reviews respectfully. Never share private customer info.

Optimization checklist

- ☐ **Claim & verify your profile**
(google.com/business)
- ☐ **Add complete contact info** —
phone, website, email, service areas
- ☐ **Upload high-quality photos**
(before/after, crews, trucks,
equipment)
- ☐ **Add services & descriptions with
keywords** (roof repair, metal
roofing, emergency tarp service)
- ☐ **Post updates weekly** — project
spotlights, storm alerts, seasonal tips
- ☐ **Ask for reviews after every job**
(and respond to them)
- ☐ **Turn on messaging** so leads can
contact you instantly
- ☐ **Check GBP Insights often** to see how
people find and interact with your listing

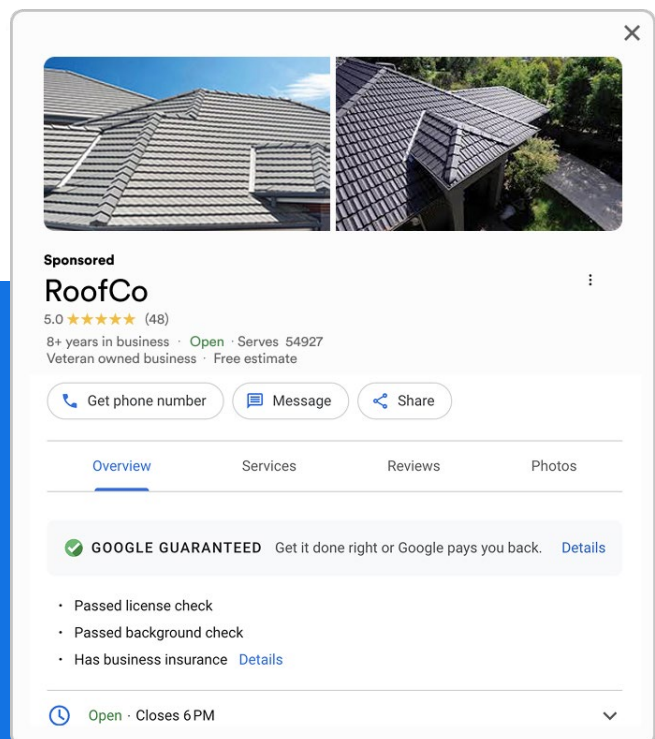


GBP tips

- Pin your seasonal offers or storm-response updates to the top of your GBP posts.
- Share before/after project photos with location tags to help you show up in nearby searches.
- Use the Q&A feature to pre-answer common homeowner questions (like “Do you offer financing?”).



- Include your Instant Estimator link in your GBP website button or in posts.
- Tag leads from GBP in the Roofr CRM to track conversion rates.
- Use Roofr Automations to send review requests right after jobs finish.



Text Message Marketing (SMS)

Email is great for long-term follow-up, but for real-time responses, texting wins every time.



Texting is one of the most powerful tools roofers have today.

It's fast, direct, and almost guaranteed to be seen. Homeowners read texts within minutes, and that speed makes SMS one of the best ways to win jobs and keep customers in the loop.

Roofers, SMS is a game-changer for:

- **Speed-to-lead** — catch prospects as soon as they request an estimate.
- **Smooth scheduling** — confirm and remind customers about appointments.
- **Job updates** — keep customers informed during production.
- **Post-job follow-ups** — request reviews and referrals while the experience is fresh.

Where it fits in your funnel:

Text messaging is key at all funnel stages:

- **New lead** → instant text confirmation (acknowledge their request + set next steps)
- **Estimate scheduled** → reminder the day before, confirmation the day of
- **Production** → morning-of arrival updates, weather delay notices, completion alerts
- **Post-job** → thank-you, review request, referral program offer

📈 Bonus tips

1. Add Instant Estimator links so homeowners can get a ballpark price instantly.
2. Use dynamic fields (name, address, appointment time) to personalize each message.
3. Track (segment) texts by campaign (storm events vs. seasonal maintenance) to see what works best.

Dynamic fields

Drag and drop the field you want into the document and it will populate with information from the job

Customer

- Customer name
- Customer email
- Customer phone

Job details

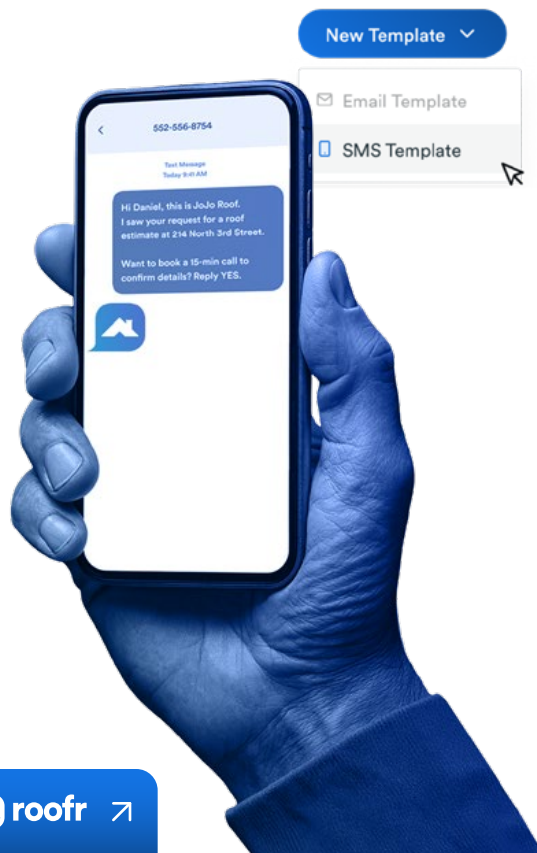
- Job address



“ No one picks up the phone anymore. Your customers **WANT** texting. Make it easy and convenient for them to do business with you. ”

– Marc Hansen, VP of Marketing @Roofr

Texting playbooks & templates



Roofr makes it simple to build and scale an SMS strategy without extra software:

- Apply and subscribe to the SMS add-on (we'll make sure you're compliant).
- Create SMS templates so it's less work for you. The playbooks above can help!
- Use automations to trigger messages at key stages (new lead, job status change, job completed).
- Track and reply to texts inside Roofr Inbox.
- Tag leads by campaign (e.g., *Storm-SMS-Aug*) to measure return on investment (ROI).



Speed-to-lead

Hi [first_name], this is [company]. I saw your request for a roof estimate at [address]. Want to book a 15-min call to confirm details? Reply **YES**.

Purpose: Strike while the lead is hot and set the next step within minutes of their request.



Appointment reminder

Reminder: [company] will be at [address] tomorrow between [time_window]. Reply **1** to confirm, **2** to reschedule.

Purpose: Reduce no-shows by giving customers an easy way to confirm or change their appointment.



Storm outreach

This is [company]. We're offering free roof checks in [neighborhood] after last night's storm. Text **CHECK** for a 10-min assessment window.

Purpose: Quickly reach homeowners in affected areas while urgency is high.



Review request

Thanks for trusting [company]! Mind leaving a quick review? [\[review_link\]](#) — it helps homeowners find us.

Purpose: Capture 5-star reviews while the positive experience is fresh.

Metrics that matter

- Response rate — are people replying?
- Booked appointments — texts to calls/site visits?
- Show rate — do reminders reduce no-shows?
- Review rate — requests to posted reviews?

Email Marketing

It may not have the instant speed of a text, but email is unmatched for nurturing leads and educating homeowners until they're ready to buy.

Email is the quiet workhorse of a roofer's marketing toolkit.

Homeowners don't always choose a roofer the same day they reach out. Sometimes it takes weeks or even months. Email lets you stay in front of them with value-packed content, reminders, and proof that you're the roofer they can trust.

It's also a great fit for seasonal campaigns like winter prep tips, spring storm readiness, or fall gutter cleanouts.

Roofers, email is a game-changer for:

- Educating buyers with visuals, examples, and simple explanations.
- Nurturing slower-moving homeowners until they're ready to schedule.
- Following up on estimates without the pressure of a phone call.
- Keeping past customers engaged with maintenance tips and offers.
- Driving reviews and referrals long after the job is done.

Where it fits in your funnel:

Email can (and should) touch almost every stage of your sales process:

- **New lead nurture** — build trust right after they inquire.
- **Estimate follow-up** — address concerns and move toward a signed proposal.
- **Review/referral campaigns** — capture reviews and encourage word-of-mouth.
- **Seasonal updates** — stay relevant with timely offers and reminders.

Bonus tips

1. Sort your list by roof type, neighborhood, or lead source for targeted messaging.
2. Run seasonal campaigns (e.g., holiday greeting or spring cleaning offer).
3. Re-engage stale leads with "New Prices & Faster Installs" emails.
4. Test subject lines — short, clear, and benefit-driven works best ("See your ballpark price in minutes").

Compliance basics

Email is regulated by CAN-SPAM in the U.S., so keep these rules in mind:

1. Include your business name and physical address in every email.
2. Provide a clear unsubscribe link in every email (and make sure it works).
3. Use truthful subject lines. No one likes a bait-and-switch.

Email Sequences That Work

1. New Lead Nurture

(3–5 emails over 10 days)

1. Establish credibility (*reviews, certifications, years in business*)
2. Explain your process in simple steps
3. Share financing options
4. Show before/after photos of recent work

2. Estimate Follow-Up

(3 emails over 7 days)

1. Recap estimate details and scope
2. Answer FAQs (*warranty, timeline, insurance*)
3. Add urgency with limited-time offers or seasonal schedules

3. Review/Referral

(2 emails over 3 days)

1. Send a direct review link
2. Encourage referrals with a “*neighbors of [street]*” promotion

4. Seasonal Maintenance

(quarterly)

1. Remind homeowners about upkeep (*gutters, inspections, ventilation checks*)
2. Pair with seasonal discounts or bundled services



Want AI prompts to help you? ↗

Find them at the end of the ebook, [here](#).

New Template ▾

✉ Email Template

✉ SMS Template

Templates

AND WHEN TO USE THEM



DAY 0

New lead

Subject: **Ballpark price for [street]?**

Hi [first_name],

Thanks for reaching out to [company]. Here's what happens next:

- We review your property details.
- You get a ballpark price in minutes.
- We schedule a time to confirm measurements.

Get My Estimate

Here are some examples of recent projects nearby:

[Insert 2 project images]

Ready when you are,
[Your Name], [Company].



DAY 2

Estimate follow-up

Subject: **Your roof timeline & next steps**

Hi [first_name],

We've penciled in your roof for [timeframe]. Permits take [permit_time], and our crew can complete the job in [install_time].

Questions about materials or financing? Let's get those sorted so we can lock in your start date.

Book My Call



Post-job referral

Subject: **Did we earn a 5-star review?**

Thanks again for trusting us with your roof!

If you could leave us a quick review, it would mean the world: [{review_link}](#)

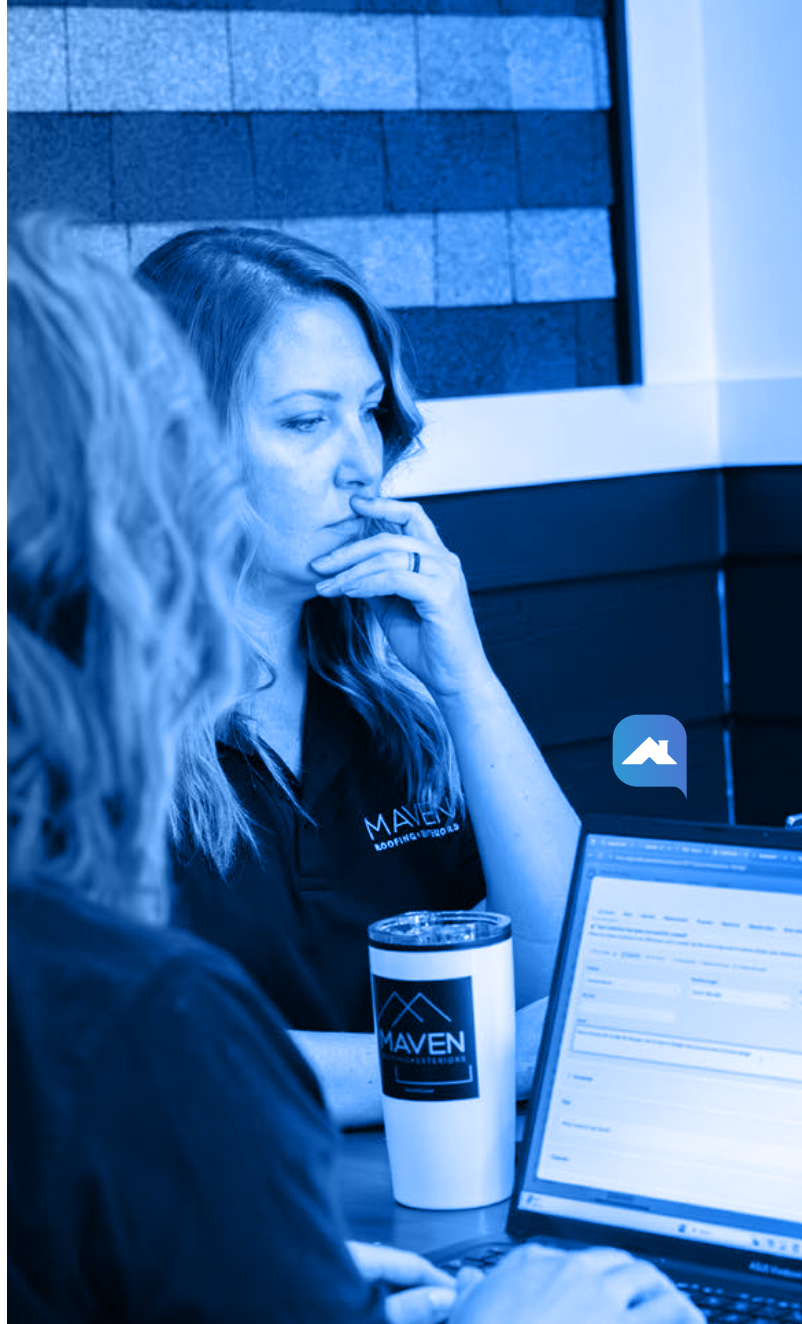
Know a neighbor who needs help? We'll prioritize folks on your street and thank you with a little something in return.

Refer them here: [{referral_link}](#)



Track these to **measure success**

- **Open rate** — are subject lines clear and engaging?
- **Click-through rate** — are people taking the action you want? (limit to 1 main CTA per email)
- **Estimates requested** — are emails moving prospects forward?
- **Jobs won tied to campaigns** — measure the ROI of email marketing



- Connect Gmail to Roofr so emails come from your domain.
- Use branded templates with dynamic fields (name, address, etc.).
- Build Automations that trigger based on pipeline stage (e.g., “Estimate Sent” → follow-up sequence).
- Add Instant Estimator links to track lead sources.
- Send Proposals with e-signature right from Roofr.

Email Template ×

Template Name

Category

Proposal not ready email

Proposals

Subject

Dynamic Fields

Proposal coming soon for Job address

53/150

Message

B **I** **U** Merge Field Attach File

Hi Customer Name

I'm just reaching out to let you know we've received your enquiry about Job Address and will be getting back to you as soon as possible. I attached our marketing brochure on the common roof

Social Media Paid Ads

Facebook and Instagram ads are like a fast-forward button for getting in front of homeowners who need your services.



The beauty of paid social is speed & scale: launch an ad at breakfast, and have new leads by lunch.

And unlike flyers or yard signs, you can track every click, form submission, and booked job back to the exact ad that drove it.

Whether it's storm response or seasonal promos, Meta's ad platforms let you target with precision, right down to the ZIP codes that saw hail last night.

Roofers, social media ads are a game-changer for:

- Generating fast leads after local storms hit.
- Targeting homeowners in high-value ZIP codes.
- Filling your calendar in slower seasons with promos or discounts.
- Keeping your brand visible year-round so you're the first call when a roof issue arises.
- Testing offers and messaging before rolling them out in other channels.

Where it fits in your funnel:

Social media ads live at the top and middle of your funnel:

- **Top of funnel** — introduce your brand to homeowners who don't know you yet.
- **Middle of funnel** — retarget people who've visited your site, started the Instant Estimator, or engaged with your posts but haven't asked for a quote yet.

Bonus tips

1. Add UTM parameters to Instant Estimator links to track exactly which ad or audience drove the lead.
2. Measure cost-per-qualified-lead (CPQL) — not just CPL — for true ROI.
3. Rotate creative monthly to avoid ad fatigue.
4. Use real local roof photos for authenticity and higher click-through rates.

Compliance basics

1. Follow Meta's ad policies. No misleading claims or sensational promises.
2. Respect Fair Housing rules when targeting by location.
3. Use clear, accurate photos of your own work.

Landing pages

Any page that you link to from a social media ad should:

- **Have one clear CTA**
Get an Instant Estimate
- **Include social proof**
reviews, badges, photos
- **Build trust**
answer 3 FAQs upfront

Audience setups

- Radius targeting around your service area.
- Lookalike audiences based on past customers.
- Storm-hit ZIP codes after weather events.
- Retargeting site visitors, Instant Estimator starters, and Facebook/Instagram engagers.



- Create Instant Estimator links dedicated to each ad set (e.g., FB-Storm-Northside-Aug).
- Tag leads from each campaign to measure ROI.
- Trigger SMS + email follow-ups instantly when a form comes in.
- Push hot leads to your Job Board automatically once they book.



 Copy link

Your estimates are ready for review

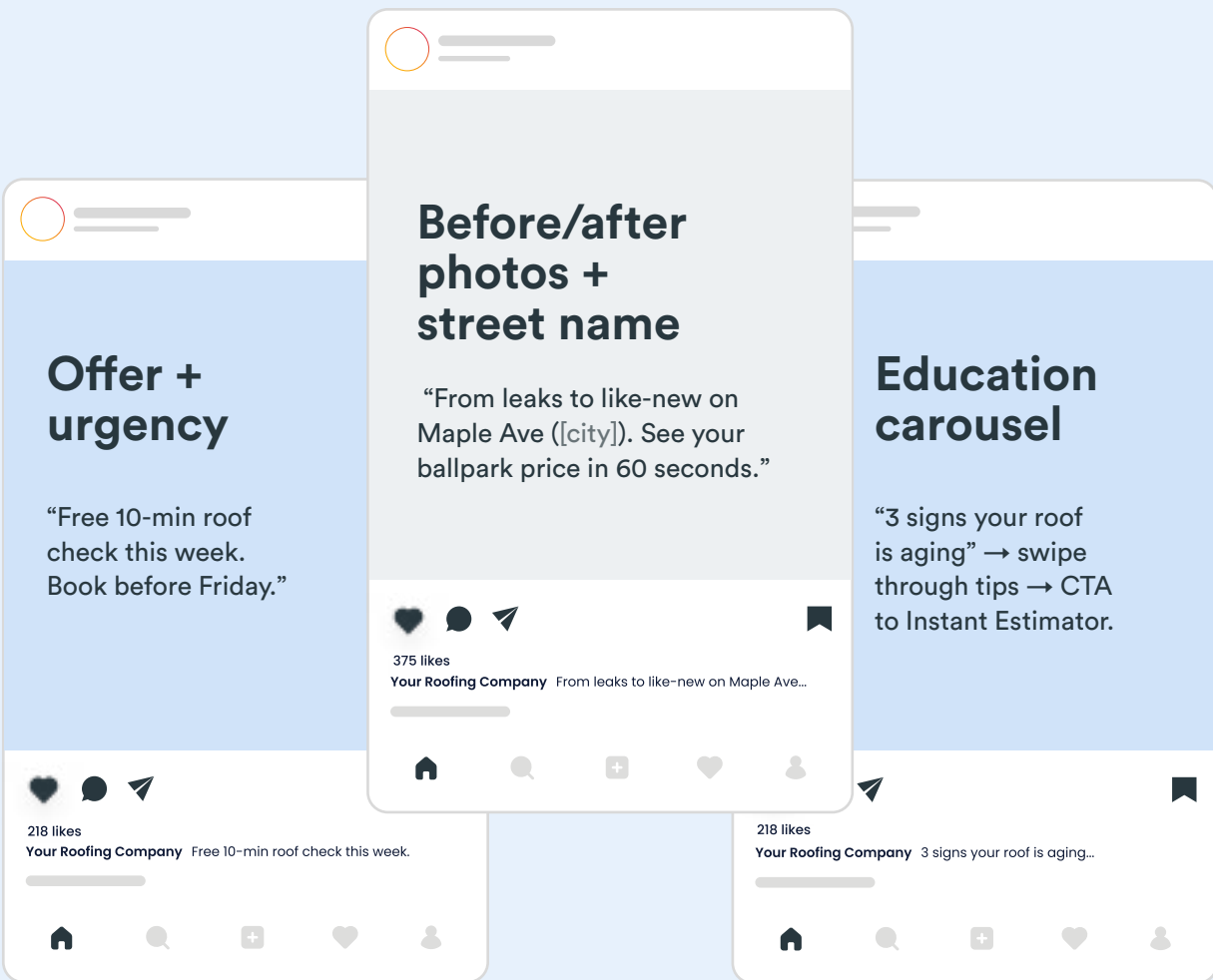


Classic Shingles
\$19,893 - \$21,8392*
[Apply for financing](#)

Get free proposal →

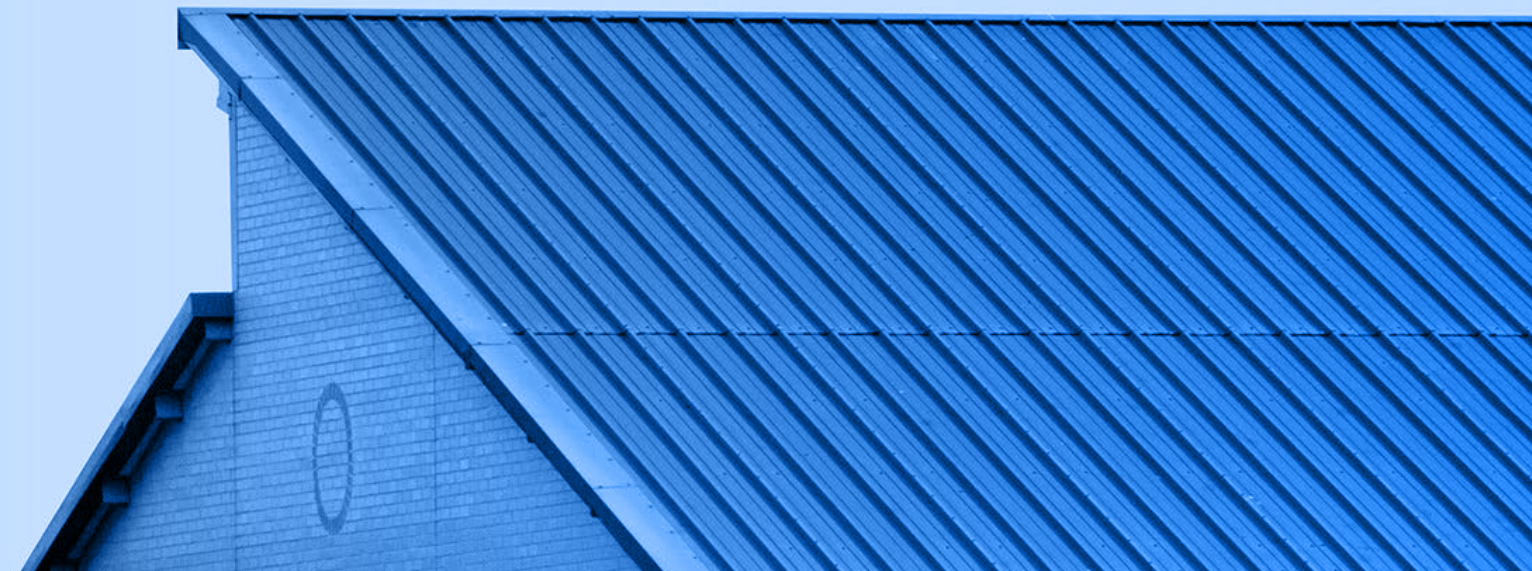


SOCIAL MEDIA AD EXAMPLES TO TRY



Leveraging Organic Facebook & Instagram

Organic social is more than likes and shares.
It's how you show up in your community
without paying for every impression.



By posting regularly, responding to comments, and being real, you build **credibility** with homeowners.

When people see your name in their feed week after week — with proof of real jobs and results — they'll think of you first when they need a roofer. Unlike ads, organic posts build a presence that grows over time.

Roofers, social media is a game-changer for:

- Building trust by showing real jobs, crews, and results.
- Getting you noticed without overspending on ads.
- Showing off your expertise with tips, FAQs, and educational posts.
- Making the community love you by supporting local causes and stories.
- Bringing in warm leads from followers who already feel connected to your brand.

Where it fits in your funnel:

Organic social should show up throughout your entire funnel:

- **Top of funnel** — bring in new followers and leads with shareable content.
- **Middle of funnel** — keep prospects engaged between interest and booking.
- **Bottom of funnel** — ask for reviews, referrals, and repeat business from past customers.

roofr ➔

- Add your Instant Estimator link to your bio and pin it to the top of your page.
- Reply to DMs with your IE link and tag the lead source in CRM.
- When a post does well, send review requests to recent customers to ride the momentum.

Bonus tips

1. Save your best FAQ Reels to a Highlight so they're easy to find later.
2. If a Reel performs well organically, boost it as an ad instead of creating new content.
3. Use campaign-specific IE links for giveaways or contests so you can track results.

Compliance basics

1. Follow group rules when posting in local Facebook groups (some ban self-promotion).
2. Get permission before posting photos of people or private property.
3. Never share private homeowner info in captions or comments.

Ideas for weekly posts

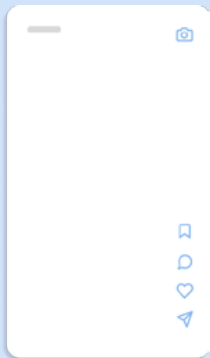
Change it up often so your feed never gets repetitive:

- Project spotlights (with addresses hidden).
- Your team's stories — crew highlights, birthdays, milestones.
- Safe DIY repair tips for homeowners.
- Storm updates with inspection or insurance advice.
- Behind-the-scenes shots from job sites.
- FAQs answered in plain language.
- Customer reviews in graphics or video.

Use social to join the community

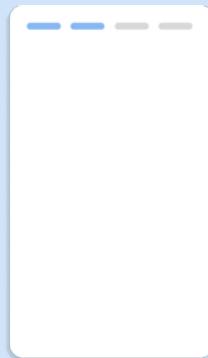
- Engage in local groups (follow the rules).
- Partner with realtors, HOAs, businesses, etc.
- Partner with another local business on a giveaway to get your name out there.

Formats you should try



Reels

Quick videos of inspections, time-lapses, before/after transformations



Stories

24-hour posts perfect for sneak peeks, updates, polls (*"Do you know your roof's age?"*)



Carousels

Wipe-throughs for shingle color options, myths vs. facts

“Instagram Reels and short social media videos are one of the most undervalued opportunities to build brand equity and win customers. It costs nothing but your time, and can make a huge difference. **Do it!**”

– Michael Stearns, Ascend Digital



Tracking, Reporting, & Optimization

In roofing, marketing without measurement is like installing shingles without checking your lines. You might get the job done, but it won't be nearly as good.



Tracking your results shows you what's working, what's wasting money, and where to **focus**.

By paying attention to leads right up to the day the invoice is paid, you can spot your highest-ROI channels, fix bottlenecks, and double down on the strategies that actually make you money.

Without watching the numbers, you'll pour time and budget into things that don't deliver.

Roofers, tracking & reporting is a game-changer for:

- Knowing which channels produce paying jobs (not just leads).
- Cutting wasted spend on underperforming ads or campaigns.
- Spotting weak links in your sales process (response speed, proposal close, follow-up).
- Learning exactly when and how customers engage.
- Predicting growth by looking at lead-to-close data over time.

Where it fits in your funnel:

Tracking should happen throughout your entire funnel:

- **Top of funnel** — impressions, clicks, Instant Estimator starts
- **Middle of funnel** — IE completions, booked appointments, proposal sends
- **Bottom of funnel** — jobs won, revenue, review rates

Bonus tips

1. Track revenue per lead source, not just volume — 10 Facebook leads might be worth less than 3 referrals.
2. Combine UTM tracking in IE links with CRM tags for airtight attribution.
3. Bring your data into sales meetings. It'll help you refine scripts and solve problems that are slowing down deals.

Compliance basics

1. Follow privacy laws like CCPA or GDPR if applicable.
2. Be transparent about how you track and store customer data.
3. Keep all homeowner data secure, especially personal contact info.

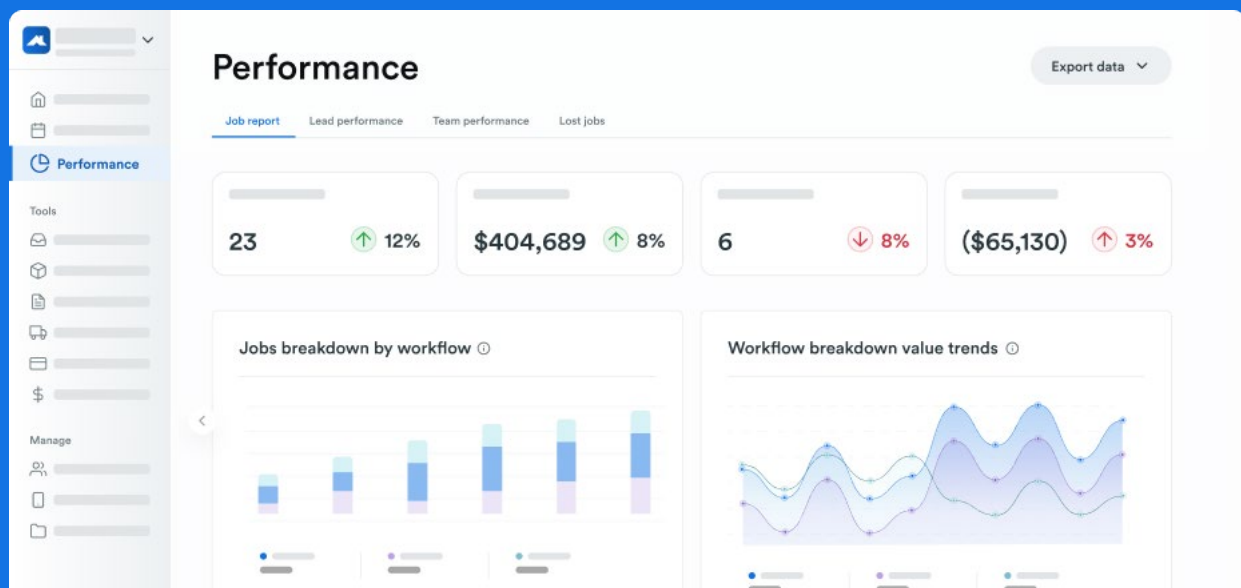
Key metrics to track

- **Lead source performance** — IE starts and completions by channel.
- **Conversion rates** — % of IE completions → appointments → proposals → wins.
- **Time-to-contact** — how fast your team responds to new leads.
- **Cost-per-qualified-lead (CPQL)** — better than just cost-per-lead.



- Tag every lead with a source when they enter your CRM.
- Use pipeline views filtered by source to compare performance.
- Export monthly reports to see trends.

- Run A/B tests in Instant Estimator. Adjust copy or price ranges to improve conversions.
- Review automation performance, and make sure your follow-up timing is helping, not hurting.



Ready-to-Launch 30-Day Plan

This 30-day plan is your “no-excuses” blueprint. It’ll help you get core marketing systems in place, generate leads, and track results.

**It's one thing
to read about
marketing
strategies.
It's another to
actually put
them in place.**

Breaking marketing plans into weekly chunks can help you build momentum that you can grow on. Each step sets you up for slow, measurable growth, using proven tactics that work in the roofing industry.

Roofers, a 30-day plan is a game-changer for:

- Focusing on one area at a time so nobody gets overwhelmed.
- Launching fast instead of getting stuck in “planning mode.”
- Building a marketing foundation that runs in the background while you're on jobs.
- Creating consistency so leads flow in every week, not just after storms.
- Seeing early wins that motivate you (and your team) to keep going.



The 30-Day Checklist

WEEK ONE

Get the Basics in Place

Set up your system to catch every lead.

- ☐ Turn on **Text Messaging** in Roofr.
- ☐ **Connect Gmail to Roofr** for branded email sends.
- ☐ Create 8 core **templates** (SMS + email):
 - speed-to-lead
 - appointment reminders
 - storm outreach
 - review requests
 - new lead nurture
 - estimate follow-up
 - referral ask
 - seasonal maintenance
- ☐ **Embed your Instant Estimator** on your homepage.
- ☐ Create **two dedicated landing pages**:
 - Storm Response
 - Seasonal Maintenance

WEEK TWO

Turn on Lead Flow

Start bringing in prospects.

- ☐ Launch **Facebook/Instagram Ads** (2 creatives × 2 audiences: one geotargeted, one retargeted).
- ☐ **Post 3 Reels on Facebook/Instagram** — project highlight, quick tip, before/after.
- ☐ Activate **review/referral automation** in Roofr.
- ☐ **Embed your Instant Estimator** on your homepage.
- ☐ Put an Instant Estimator link in your **Google Business Profile**.



WEEK THREE

Nurture & Expand Reach

Remind leads you're ready to help.

- ☐ Send your **New Lead Nurture Sequence** to all leads from the last 6 months.
- ☐ **Start your "Neighborhood Proof" series**: weekly post with job before/after + street name (address hidden).
- ☐ Post in at least 3 **local Facebook Groups** (answer questions, share tips).
- ☐ **Email a seasonal maintenance tip** to your full list (link to IE for inspections).

WEEK FOUR

Optimize & Double Down

Cut what's not working, scale what is.

- ☐ **Review campaign results**—check cost-per-lead for each lead source.
- ☐ **Pause any ad sets** that aren't working.
- ☐ Tweak Instant Estimator copy or questions to **improve completions**.
- ☐ **Add 3 new testimonials** to your homepage and social profiles.
- ☐ **Mail postcards or door hangers** to streets where you completed jobs this month.

AI Prompts

(For tools like ChatGPT, Gemini, or Claude)



AI is a great tool to help you **get started** in marketing and take away some of the guesswork.

It's not a perfect replacement for human writing or design, but for a small and scrappy team, it'll give you solid stuff that brings in work. Here are some prompts you can use to get you started.

Pick your fave LLM (large language model), sign up, and get those ideas flowing. Popular options include ChatGPT, Gemini, Claude, Grok, and DeepSeek.

NOTE: AI tools can and do make mistakes, so verify stats for yourself. You can also ask AI models to link to their sources so you can double check them. AI is an incredible jumping off point, but any statistics or "facts" should not be taken at face value.



AI PROMPTS TO HELP YOU GET STARTED

Marketing 101

- Help me define my ideal roofing customer in [my city/state].
- List five marketing ideas for roofers targeting neighborhoods built before [year].
- Where can I find free demographic data for [my county]?
- Give me a seasonal marketing calendar for a roofing business in [location].
- Write a professional slogan for my roofing business that focuses on [speed/quality/value].

Website Best Practices

- Write homepage copy for my roofing website targeting [city/region].
- List the top 5 trust elements I should have on my roofing homepage.
- Give me a headline and subheadline for a storm response landing page.
- Help me write 3 customer testimonials for my site based on these job details: [details].
- Write an FAQ section for a roofing website about estimates, timelines, and warranties.

Text Message Marketing (SMS)

- Write 3 SMS templates for following up with roofing leads within 5 minutes.
- Create a storm damage outreach text for homeowners in [neighborhood].
- Write a friendly reminder text for a roofing estimate appointment.
- Give me an SMS to request a Google review after a job.
- Help me create SMS copy that includes my Instant Estimator link.

Social Media Ads (Meta + Local Awareness)

- Write 3 Facebook ad headlines for storm damage repair in [neighborhood].
- Give me ad copy for a seasonal roofing maintenance promo.
- Suggest targeting options for Facebook Ads for my roofing business in [city].
- Write a retargeting ad for people who visited my Instant Estimator page but didn't book.
- Create an ad script for a 15-second Instagram video promoting free inspections.

Email Marketing

- Write a 5-email nurture sequence for new roofing leads.
- Draft a follow-up email for a homeowner who received an estimate but hasn't responded.
- Give me a quarterly maintenance email template for [season].
- Write an email asking for a referral from a happy roofing customer.
- Suggest subject lines for a roofing promo email about [offer].

Leveraging Facebook & Instagram (Organic)

- Give me 10 social media post ideas for a roofing business.
- Write captions for before-and-after roof replacement photos.
- Draft a short Reel script showing a time-lapse of a roof install.
- Suggest poll questions for Instagram Stories that engage homeowners.
- Write a thank-you post for a recent customer in [neighborhood].

AI PROMPTS TO HELP YOU GET STARTED

Branding 101

- Help me write a one-liner for my roofing business that emphasizes [speed/quality/cleanliness].
- Create 3 brand claims that highlight what makes my roofing company different.
- Suggest ideas for a memorable roofing company slogan.
- Give me design ideas for branded yard signs.
- List the items I should include in a brand style guide for my roofing business.

Ready-to-Launch 30-Day Plan

- Give me a daily checklist to set up my roofing marketing in 30 days.
- Write a 4-week social media posting plan for my roofing business.
- Suggest quick marketing wins I can do in my first week of launching.
- Help me plan two Facebook Ad campaigns for storm season.
- List the templates I need (email, SMS, proposals) to start marketing my roofing business.

Measurement & Optimization

- Help me build a spreadsheet to track leads, proposals, and jobs won by source.
- Suggest KPIs to track for my roofing marketing campaigns.
- Explain how to calculate cost-per-qualified-lead (CPQL) for my roofing ads.
- Give me 3 ideas to improve my Instant Estimator completion rate.
- Help me write a monthly marketing performance report for my roofing company.



Marketing Glossary for Roofers

For all the terms you need to know
to become a marketing master.



MARKETING GLOSSARY FOR ROOFERS

A/B Testing

A way to compare two versions of something (like an ad, landing page, or email) to see which performs better. You change one thing at a time — such as a headline or call-to-action — and track the results.

Above the Fold

The part of a web page you see without scrolling. Important for placing your main message and call-to-action where visitors notice it first.

Ad Creative

The visual (photo/video) and text (headline/copy) parts of an ad that people actually see.

Ad Set

In Facebook/Instagram Ads, a group of ads that share the same audience targeting, budget, and schedule.

Automation

A marketing task that's set to run automatically — like sending a follow-up text when a lead fills out your Instant Estimator.

Brand Awareness

How familiar people are with your company's name, logo, and services, even if they haven't hired you yet.

Brand Colors

The specific colors you use across all marketing materials to keep your look consistent.

Brand Guidelines

A document that explains how your brand should look and sound, covering logo use, colors, fonts, tone of voice, and more.

Brand Promise

A short statement that sums up what customers can expect from you every time they work with you.

Call-to-Action (CTA)

The part of your marketing that tells people exactly what to do next, like "Get an Instant Estimate" or "Call Now."

Click-Through Rate (CTR)

The percentage of people who click your ad or link after seeing it. High CTR means your message is connecting.

Content Calendar

A schedule of what and when you plan to post on social media, your blog, or in emails.

Conversion

When someone takes the action you wanted — like booking an appointment, filling out your contact form, or signing a proposal.

Conversion Rate

The percentage of visitors or leads who convert (take the desired action).

Cost Per Click (CPC)

The amount you pay each time someone clicks your online ad.

Cost Per Lead (CPL)

The average cost to generate a single lead from your marketing.

Cost Per Qualified Lead (CPQL)

The cost to generate a lead who meets your specific criteria (like being in your service area and needing a new roof).

Customer Relationship Management (CRM)

Software that helps you store, track, and manage leads and customers. Roofr includes a built-in CRM.

Demographics

Statistical data about people (like age, income, or homeownership) used to target specific audiences.

Display Ads

Banner-style ads that appear on websites, usually with images, text, and a clickable link.

Drip Campaign

A series of marketing messages (email or SMS) sent over time to nurture a lead toward buying.

Engagement Rate

How much people interact with your content (likes, comments, shares, clicks) compared to how many people saw it.

Funnel

The sales or marketing funnel, meaning a person's full journey from first learning about your business to becoming a paying customer. This happens over many stages of "nurturing" target prospects.

Geo-Targeting

Delivering ads or content to people in a specific geographic area, like a storm-hit ZIP code.

Google Business Profile (GBP)

A free Google listing for your business that appears in search results and maps — vital for local SEO.

MARKETING GLOSSARY FOR ROOFERS

Impressions

The total number of times your ad or content is shown to people.

Instant Estimator (IE)

Roofr's tool that gives homeowners a ballpark roof price in minutes while capturing their contact info for follow-up.

Key Performance Indicator (KPI)

A measurable value that shows how well your marketing is working, like leads generated, conversion rate, or CPQL.

Landing Page

A standalone web page built for a specific campaign or offer, with one clear goal (like booking an inspection).

Lead Magnet

A free resource or offer that encourages someone to give you their contact info. For example, a free inspection or downloadable storm checklist.

Lead Nurturing

Building relationships with potential customers over time until they're ready to buy.

Lookalike Audience

A Facebook/Instagram Ads feature that targets people similar to your best customers.

Mobile-First Design

Designing your website to look and work great on phones, since most visitors will view it that way.

Nurture

How you guide target prospects to become paying customers. A "nurture campaign" involves following up with leads or giving them new reasons to choose your services, nudging them to become a customer.

Organic Reach

The number of people who see your content without paid promotion.

Pay-Per-Click (PPC)

An advertising model where you pay each time someone clicks your ad. Used on platforms like Google Ads and Facebook.

Pipeline

A visual overview of where your leads are in the sales process, from new inquiry to closed job.

Prospect

A possible lead, or a future potential customer.

Referral Program

A system that rewards customers for sending new business your way.

Remarketing / Retargeting

Showing ads to people who have already interacted with your website or social media but haven't converted yet.

Return on Investment (ROI)

How much profit you make compared to what you spend on marketing.

Search Engine Optimization (SEO)

Improving your website so it ranks higher in search results for relevant terms (like "roof repair near me").

Segmentation

Dividing your audience into groups based on location, job type, or other traits for more targeted marketing.

Social Proof

Evidence that others trust your business, like reviews, testimonials, or photos of completed jobs.

Split Testing

Another term for A/B testing — running two versions to see which performs better.

Storm Response Campaign

A marketing push right after severe weather hits, targeting affected homeowners with timely offers.

UTM Parameters

Tags added to a link that help track exactly where clicks and leads come from.

Value Proposition

A clear statement of the unique value your company offers to customers.

Warm Lead

A prospect who has already shown interest in your services and is more likely to convert.



TRY ROOFR FOR FREE TODAY

**Built by roofers,
trusted by roofers.**