

Roofr Amazing Automations Master Class

At John McClung Roofing, we use automations to populate common tasks, move jobs thru stages in a timely manner, and communicate more effectively with our customers and leads. To date, we have 39 Automations. Below are some of the automations we use daily:

Green text indicates **ROOF REPLACEMENT WORKFLOW** only

Red text indicates **REPAIR WORKFLOW** only

All auto-tasks are for the Job Owner, unless otherwise noted.



Action	Automation		
	Auto-task	Auto-Progression	Auto-Communication
Job card is moved to APPOINTMENT SCHEDULED	"Upload photos to CompanyCam"		
	"Move to EMAIL stage"		
Proposal is sent		Move to PROPOSAL SENT stage	
		Job value changes to "best value" (this automation needs some work)	
4 days after proposal is sent		Move to PROPOSAL FOLLOW UP	Auto-email to customer to follow up
Job card is moved to or remains in PROPOSAL FOLLOW UP			Salesman will call to follow up.
			Salesman or office will send personalized email or the "Proposal Expiring" email template.
30 days after proposal is sent		Change job stage to REVIEW THEN MOVE TO LOST	
60 days after proposal is sent		Change job stage to REVIEW THEN MOVE TO LOST	

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Action	Automation		
	<i>Auto-task</i>	<i>Auto-Progression</i>	<i>Auto-Communication</i>
Customer signs		Move to SIGNED - NEEDS TO BE CATEGORIZED	
		Office reviews to assure workflow is appropriate, then manually moves repairs to DO LIST and re-roofs to PRE-PRODUCTION	
Job card is moved to DO LIST	"Assure repair is complete and photos are in CompanyCam, then change stage to READY TO INVOICE."		
Job card is moved to PRE PRODUCTION	Several tasks populate for our Roof Coordinator and Accountant (collect shingle color, etc)		Auto-email to customer (need shingle color, approximate timeframe, etc)
Job card is moved to ON DECK	More tasks populate for our Roof Coordinator (send material list, etc)		
Job card is moved to PRODUCTION	Tasks populate for Project Manager, Roof Coordinator, and Accountant		Auto-email to customer (shingle delivery date, approximate start date, etc)
Job card moved to POST PRODUCTION	Tasks populate for office staff to request a review, send warranty documents, and send thank you card.		

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	<i>Auto-task</i>	<i>Auto-Progression</i>	<i>Auto-Communication</i>
Job card moved to WARRANTY/GO BACK	"Investigate customer's complaint."		
	"Complete warranty repair, summarize repair in Internal Notes, then change stage to COMPLETE."		

Some automations we've used in the past:	
Hurricane Helene	For several months following Hurricane Helele (9/2024), we sent an auto-email to every Lead, assuring them they were in our queue and we'd call them as soon as we could.
Price Increases	When we've been alerted about a manufacturer price increase, we use that as a tool to close sales before the new prices take affect.