

The Roofing Tech-Stack Audit

Find out what your pile of apps is really costing you — in dollars, in hours, and in details that slip through the cracks. Fifteen minutes, one honest look at your setup.

Most small roofers don't choose a six-app stack — they collect it, one problem at a time. This worksheet helps you see the whole thing at once, so you can decide what stays, what goes, and where an **all-in-one platform** would save you the most. Print it, or fill it in on screen.

Step 1 · Inventory your tools

List every tool that touches a job — CRM, measurements, estimates, proposals, material ordering, invoicing, payments, scheduling, crew texts, photo apps, spreadsheets.

TOOL / APP	WHAT IT DOES	MONTHLY COST	# OF SEATS	TALKS TO YOUR CRM?
		\$		Y / N
		\$		Y / N
		\$		Y / N
		\$		Y / N
		\$		Y / N
		\$		Y / N

Add up the monthly costs, then multiply by 12. That yearly number is your starting line.

Step 2 · Spot the leaks

Check every box that's true for your shop today. The more you check, the more your stack is costing you.

- ☐ I re-type the same job info (address, name, measurements) into more than two tools per job.
- ☐ I pay for tools by the seat, and the bill climbs every time I hire.
- ☐ Crew details live in a group text that someone has to scroll back through to find.
- ☐ To see how the month actually went, I have to export and reconcile more than one report.
- ☐ An invoice has gone out late because it lived in a different system than the signed proposal.
- ☐ Onboarding a new hire means setting up logins for four or more separate tools.
- ☐ Only one person can log in to send an invoice or pull a payment.
- ☐ My Saturday regularly goes to admin the week's tools should have handled.

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YOUR LEAK SCORE

0–2 checked — Tight ship. Keep an eye on cost as you grow.

3–5 checked — The gaps are showing. One platform would pay for itself.

6–8 checked — You're running a part-time job you never applied for. Time to consolidate.

Step 3 · Decide what earns its place

Not every tool has to go. A point solution earns its spot when it does something a platform can't — and shares data cleanly. Everything else is a candidate to fold in.

- ☐ **Keep — it's specialized and it syncs.** Solves a real need (production, job costing, photos) and connects to my CRM.
- ☐ **Fold in — the platform already does this.** Leads, estimates, measurements, proposals, materials, invoicing, or payments a single system can cover.
- ☐ **Cut — it strands data on an island.** Makes me copy-paste and gives nothing back the rest of the workflow can use.

See your whole workflow in one place.

Roofr runs the job from first lead to final payment — CRM, Instant Estimator, Measurements, Proposals, Material Ordering, and Payments, one login. Start free and fold the stack into one platform.

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