

Golden Nail Roofing Procedure Guide

1. What to Expect and Company Expectations

Comprehensive Overview for Project Managers

Daily Schedule and Workflow for Project Managers:

Golden Nail Roofing operates on two main types of days: **Install Days** and **Canvassing Days**. While the position is commission-based, Project Managers are expected to adopt a structured approach similar to a 10 AM to 6 PM workday. This consistency helps ensure productivity, professionalism, and maximum earnings potential. The following outlines the key routines and responsibilities:

1. Pre-Day Preparation (Night Before)

- **Team Coordination:** Connect with your Team Lead to review the area you will be canvassing the next day. Identify target neighborhoods, understand client demographics, and strategize door-to-door approaches.
- **Goal Setting:** Establish personal objectives—such as the number of doors to knock, leads to generate, and appointments to schedule—to maintain focus and motivation.

2. Install Days

- **6:30 AM – Start of Day:**
 - Even though work is commission-based, treat Install Days with discipline and structure. Arrive at the office by 9:00 AM to 10:00 AM for any scheduled training (typically Monday, Wednesday, or Saturday).
 - **Training Sessions:** Participate in training on roofing techniques, customer service excellence, and industry updates to maintain a high level of skill and professionalism.
- **10:00 AM – Canvassing and Installation Oversight:**
 - **Team Briefing:** Post-training, meet with the installation crew or relevant team members to outline the day's tasks. Assign roles, verify necessary materials are on-site, and confirm everyone understands their responsibilities.
 - **Site Management:** Travel to the designated job site(s) to oversee roofing installations. Ensure each phase meets company standards and that on-site teams are properly coordinated.
- **12:00 PM – Lunch Break:**
 - Coordinate lunch between 12:00 PM and 1:00 PM to maintain work continuity. Use this time to address any pressing issues or conduct brief site inspections.

- **Afternoon Operations:**
 - Continue monitoring installation progress, addressing challenges, and ensuring teams adhere to project timelines.
 - Communicate effectively with subcontractors or suppliers as needed.
- **4:30 PM – Site Review and Debrief:**
 - Conduct a thorough site review to assess the day's accomplishments, confirm quality standards, and ensure no outstanding tasks remain.
 - Debrief with the crew to discuss performance, resolve any issues, and plan the following day's activities.
 - Secure tools, store materials properly, and ensure the worksite is left orderly.

3. Canvassing Days

- **9:00 AM – 10:00 AM – Office Start:**
 - Arrive at the office to prepare for canvassing activities. Review leads, update client information, and gather marketing materials.
 - **CRM Updates:** Utilize AccuLynx or your designated CRM to track leads. Share relevant calendar events with your Team Lead and Golden Nail Roofing Secretary.
- **10:00 AM – Field Operations:**
 - **Door-to-Door Engagement:** Head to designated neighborhoods to connect with potential clients, discuss their roofing needs, and provide estimates.
 - **Lead Management:** Consistently log new leads and update existing ones within the CRM.
 - **Collecting Homeowner Checks:** Place collected checks in labeled envelopes (with homeowner addresses) and deliver them to the office by the day before the install or, at the latest, on install day.
- **12:00 PM – 1:00 PM – Lunch Break**
 - Coordinate lunch to recharge and ensure you're ready for the afternoon's canvassing efforts.
- **Afternoon Field Operations:**
 - Continue knocking on doors, following up on leads, and engaging homeowners.
 - **Insurance Adjuster Coordination:** Call insurance adjusters for active claims to get status updates, clarify any pending information, and keep the homeowner informed on progress. Document updates in the CRM.
 - Update CRM notes regularly and communicate with your Team Lead for real-time guidance or territory adjustments.
- **3:30 PM – Return to Office:**
 - Compile daily canvassing reports and update client databases with any new information.

- **Team Lead Debrief:** Engage with your Team Lead (in person or via chat) to review performance, finalize next-day plans, and coordinate follow-up strategies.

4. Ongoing Lead Follow-Up:

- **Regular Check-Ins:** Consistently call, text, or email any homeowners who have shown interest but haven't committed yet, ensuring you remain top-of-mind.
- **Insurance Claim Monitoring:** If a homeowner's claim is in progress, call their insurance adjuster to confirm coverage details, timelines, or additional documentation needed.
- **CRM Documentation:** Document all conversations—homeowner or adjuster—in the CRM to maintain accurate records and ensure seamless collaboration with the internal team.

Commission Structure and Self-Management:

- **Commission-Based Incentive:** While the position is commission-only, treating your schedule as a standard 10 AM–6 PM workday encourages discipline and consistent success.
- **Time Management:** Prioritize daily tasks, maintain balanced workflows, and set attainable goals to optimize sales and client relations.

Company Culture and Values:

Golden Nail Roofing is built on a foundation of **excellence, integrity, and teamwork**. We uphold:

- **Quality Craftsmanship:** Delivering roofing solutions that meet or exceed industry standards.
- **Customer Satisfaction:** Prioritizing client needs, offering exceptional service, and communicating effectively.
- **Continuous Improvement:** Encouraging training, development, and innovation to stay ahead in the industry.
- **Respect and Integrity:** Upholding ethical standards and fostering a supportive, inclusive work environment.

Importance of Punctuality, Teamwork, and Communication:

- **Punctuality:** Preserves Golden Nail Roofing's reputation for reliability and keeps projects on track.
 - **Teamwork:** Encourages collaboration, efficient task completion, and a positive work atmosphere.
 - **Communication:** Ensures timely updates, prompt issue resolution, and alignment with client expectations.
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2. Supplement Photos and Overview Photos at the Install

Capturing Supplement Photos:

1. Preparation

- Review the install plan to identify key areas where photos may be needed for supplements (e.g., damage to decking, unexpected roof issues, additional structural concerns).
- Coordinate with the Team Lead or supervisor to confirm the exact photos required for insurance or supplemental documentation.

2. During the Install

- Take clear, well-lit pictures of any damage or extra work discovered.
- Label each photo with a brief description (e.g., "Rotten Decking in Southwest Corner").
- Focus on showing the scope of the issue (wide-angle) and the specific details (close-up).

3. Proper Documentation

- Store and label your photos in a dedicated folder or CRM platform, ensuring quick access if insurance or client questions arise.
- Communicate with the office team or supplements department to confirm they have all necessary images.

Overview Photos for Project Completion:

1. Before Work Begins

- Capture images of the roof from multiple angles.
- Document overall condition, highlighting areas of concern or existing damage.

2. During Installation

- Periodically take photos to illustrate progress.
- Include shots of safety measures, underlayment application, and any special procedures used.

3. After Completion

- Take final overview pictures from all significant angles of the finished roof.
- Ensure the property is clean, showcasing Golden Nail Roofing's commitment to quality and cleanliness.
- These photos serve as proof of a job well done and can be used for marketing, client assurance, or quality control.

4. Organization and Sharing

- Label and categorize each set of images by project or address.
 - Share select photos with homeowners, demonstrating transparency and pride in workmanship.
 - Maintain a portfolio of before-and-after images for company marketing and training purposes.
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3. Homeowner Expectations

Exemplary Client Relations and Professional Conduct

Effective Communication with Homeowners:

- **Frequent Updates:** Inform homeowners of milestones and upcoming steps.
- **Prompt Responses:** Address questions and concerns quickly.
- **Change Notifications:** Explain any changes to schedules or costs with clarity.
- **Multiple Channels:** Communicate via phone, email, text, or in-person visits as appropriate.

Guidelines for Maintaining Professionalism and Respect:

- **Appropriate Attire:** Wear company-branded attire; maintain a polished appearance.
- **Polite Language:** Use respectful, straightforward language, avoiding jargon.
- **Respect for Property:** Protect landscaping, avoid unnecessary movement, and prevent accidental damage.
- **Reliability:** Arrive on time and meet all commitments made to the homeowner.
- **Poise Under Pressure:** Resolve unexpected challenges calmly, proposing immediate and viable solutions.

Importance of Keeping the Worksite Clean and Minimizing Disruption:

- **Debris Disposal:** Remove debris frequently to maintain safety and cleanliness.
 - **Landscaping Care:** Shield plants and lawns from damage.
 - **Proper Storage:** Store tools and materials in a secure, organized manner.
 - **Noise Control:** Respect designated work hours to reduce disturbances.
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4. Picking Up Checks

Efficient and Accurate Management of Client Payments

Process for Collecting Payments from Homeowners:

1. **Invoice Presentation:** Provide a detailed invoice upon project completion or at pre-agreed milestones.
2. **Payment Methods:** Accept cash, checks, cards, or electronic transfers—always ensuring secure handling.
3. **Check Handling:** Use labeled envelopes for checks, indicating the homeowner's address. Bring these checks to the office by the day before installation, or at the latest on the install day.

Providing Receipts and Maintaining Accurate Records:

- **Receipt Issuance:** Document payment details and deliver an itemized receipt to the homeowner.
- **Financial System Updates:** Track all transactions in the company's financial software, reconciling invoices promptly.
- **Accessible Records:** Keep well-organized records for future reference, audits, or dispute resolutions.

Handling Payment Disputes or Issues:

1. **Active Listening:** Understand the root of the homeowner's concern.
 2. **Review & Clarify:** Compare contract terms, invoices, and project notes.
 3. **Fair Resolution:** Offer compromises or corrective actions when justified.
 4. **Escalation if Needed:** Involve higher management if consensus cannot be reached at the Project Manager level.
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5. Social Media Content

Strategic Guidelines for Capturing and Sharing Project-Related Content

Guidelines for Capturing and Sharing Content:

- **High-Quality Media:** Photos and videos should be clear, well-lit, and accurately represent roofing progress and results.
- **Showcase Craftsmanship:** Highlight unique or intricate work to illustrate Golden Nail Roofing's expertise.
- **Professional Context:** Avoid revealing sensitive or confidential information in posts.
- **Brand Consistency:** Include company logos or branded gear to strengthen recognition.

Obtaining Homeowner Consent Before Posting:

- **Transparency:** Explain how and where the content will be shared.
- **Written Permission:** Secure signed or emailed consent for legal and ethical protection.
- **Respect Preferences:** Remove or refrain from posting content if a homeowner requests privacy.

Aligning Content with Company's Brand and Values:

- **Positive Narratives:** Focus on successful projects, showcasing satisfied clients and teamwork.
 - **Avoiding Controversial Material:** Steer clear of posts that could be seen as offensive or misleading.
 - **Before-and-After Comparisons:** Demonstrate transformation to attract prospective clients.
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6. Take Overview Pictures of Everything

Comprehensive Documentation for Quality Assurance and Marketing

(Note: This section complements the "Supplement Photos and Overview Photos at the Install" by focusing on project-wide documentation.)

Importance of Documenting the Project with Photos:

- **Visual Archive:** Track every phase of the project for clarity and evidence of work.
- **Quality Control:** Supervisors can review photos to verify compliance with standards.
- **Dispute Handling:** Images serve as proof in case of warranty claims or disagreements.
- **Marketing Collateral:** Use compelling images to strengthen the company's portfolio.

Tips for Taking Clear and Comprehensive Pictures:

1. **High-Resolution Equipment:** Use quality cameras or smartphones.
2. **Multiple Angles:** Capture all relevant views to fully represent the roofing work.
3. **Proper Lighting:** Natural daylight typically yields the best clarity.
4. **Reference Points:** Include marked objects or measurements for scale and context.
5. **No Obstructions:** Keep tools or materials from blocking important details.
6. **Organized Storage:** Label and date photos for easy retrieval.

Utilizing Photos for Quality Assurance and Marketing:

- **Quality Checks:** Review images post-installation to ensure no steps were overlooked.
 - **Portfolio Development:** Showcase successful projects online or in printed materials.
 - **Before-and-After Comparisons:** Underscore the tangible impact of Golden Nail Roofing services.
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7. Decking on All Windows

Protecting and Securing Windows During Roofing Projects

Process and Importance of Protecting Windows:

- **Damage Prevention:** Window decking safeguards against debris, falling tools, and inadvertent impact.
- **Professional Image:** Homeowners appreciate meticulous care, boosting their satisfaction and trust.

Proper Installation of Decking on Windows:

1. **Material Selection:** Choose durable, compatible boards (e.g., plywood) for comprehensive coverage.
2. **Full Coverage:** Extend boards beyond window frames to protect the entire pane.
3. **Secure Fastening:** Fasten decking firmly so it remains stable throughout the project.
4. **Maintaining Accessibility:** Ensure windows remain operational unless protection requirements dictate otherwise.

Safety Precautions When Working Near Windows:

1. **Trained Teams:** Confirm crew members understand safe handling of materials around windows.
 2. **Stable Equipment:** Use well-maintained scaffolding or ladders to mitigate fall risks.
 3. **Clear Pathways:** Eliminate tripping hazards and maintain unobstructed routes.
 4. **Regular Inspections:** Verify protective measures remain intact throughout the project.
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8. Equipment Safety and Sign-Out

Ladder Safety and Cougar Paw Boots, Ladder, and Drone Sign-Out Procedures

Ladder Safety:

- **Inspection:** Always check ladders for damaged rungs, loose screws, or stability issues before use.
- **Proper Angle:** The recommended 4:1 ratio (1 foot out for every 4 feet up) ensures stability.
- **Secure Placement:** Place ladders on level ground and, when possible, tie them off at the top.
- **Three-Point Contact:** Maintain three points of contact (two hands and one foot, or two feet and one hand) when climbing or descending.
- **Weight Capacity:** Never exceed the manufacturer's weight rating, and avoid carrying heavy loads up or down ladders without assistance.

Cougar Paw Roofing Boots:

- **Purpose:** Cougar Paw boots provide extra traction on roofing surfaces, enhancing safety and stability.
- **Inspection & Maintenance:** Check for wear on soles or damage that could reduce grip. Replace if compromised.
- **Proper Fit:** Wear boots that fit snugly to prevent slipping or discomfort.

Drone Usage:

- **Inspection:** Check drone batteries, propellers, and cameras before each use.
- **Regulations:** Adhere to FAA guidelines for commercial or hobby drone use, including obtaining any necessary licenses.
- **Safe Operation:** Maintain visual line of sight, avoid populated areas without permission, and respect homeowner privacy.

Sign-Out Sheet Procedures:

To maintain organization, accountability, and safety, Golden Nail Roofing requires Project Managers (and their teams) to sign out equipment every time it is used:

1. **Signing Out:**
 - **Equipment Log:** Record your name, date, and time of checkout on the official sign-out sheet.
 - **Item Details:** List the specific ladder, pair of Cougar Paw boots (by size or ID), or drone (by ID or serial number).
2. **Usage Duration:**
 - **Return Deadline:** Indicate the expected return date/time. For daily usage, ensure return by the end of the same day, if possible.
3. **Condition Notes:**
 - **Visual Inspection:** Before using, quickly check the equipment's condition. Note any wear, damage, or missing parts on the sign-out sheet.
 - **Immediate Reporting:** If you find the equipment unsafe or damaged, alert the office manager or Team Lead right away.
4. **Returning Equipment:**
 - **Final Inspection:** Conduct another inspection upon return. Record any damage or issues discovered during use.
 - **Sign-In Confirmation:** The office manager or designated staff must initial or sign off on the return, confirming the item's condition.

Properly signing out and returning equipment ensures readiness for the next user, maintains accountability, and upholds Golden Nail Roofing's commitment to a safe and efficient work environment.

Conclusion

This **Golden Nail Roofing Procedure Guide** provides Project Managers with a comprehensive framework to excel in their roles. By following these guidelines—ranging from daily schedules, active claim follow-ups, and homeowner interactions, to the essential practice of capturing supplement and overview photos, proper equipment sign-out, and window protection—Project Managers embody Golden Nail Roofing’s ethos of **quality, reliability, and customer satisfaction**. Continued adherence to these procedures reinforces the company’s standing as a premier roofing provider and maintains the trust and confidence of homeowners across all service areas.

**Golden Nail Roofing
Contact Information**

Address: [Insert Company Address]

Phone: [Insert Company Phone Number]

Email: [Insert Company Email Address]

Website: [Insert Company Website URL]

Employee Acknowledgment

I, the undersigned, certify that I have received, read, and understood the procedures outlined in the **Golden Nail Roofing Procedure Guide**. I agree to abide by these procedures in all aspects of my work and understand that failure to do so may result in corrective action.

Employee Name (Printed):

Employee Signature:

Date:

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