

Where Should a Roofer Actually Start With AI?

A practical field guide to AI teammates for roofing companies.

Most roofing owners are not anti-AI. They are just tired of vague AI pitches.

They hear that AI can answer phones, write emails, create estimates, find leads, build reports, clean up data, and automate follow-up. All of that may be true. But it creates a practical problem: **where do you actually start?**

Roofing companies do not need another blank chat box. They need a clear lineup of roofing workflows where AI can do useful work inside the systems they already use. This guide gives you that lineup.

It is written for roofing owners, operators, sales leaders, estimators, office managers, and admin teams who want a simple way to think about AI in the roofing business:

- What should AI do first?
- What should still require human approval?

- How does it work with your CRM, email, estimating tools, documents, and accounting systems?
- How do you measure whether it is actually worth the money?

Start with one workflow your company already runs every week — repetitive, valuable, measurable, and dependent on busy people remembering to do it. Then prove it.

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AI becomes useful when it is attached to real steps.

Roofing companies are different in the details, but the core workflow is usually familiar:

THE ROOFING OPERATING PATTERN

- 1 A customer calls, submits a form, sends an email, or asks for help.
- 2 Someone qualifies the need and books an appointment.
- 3 An estimator or inspector visits the property.
- 4 The team gathers measurements, photos, notes, history, and pricing inputs.
- 5 An estimate or proposal is created.
- 6 The customer gets follow-up.
- 7 If sold, the job moves into production.
- 8 Permits, materials, schedule, documents, invoices, payments, and closeout all need to stay organized.

AI becomes useful when it is attached to those real steps. The right question is not *"How can we use AI?"*

| *"Which roofing workflow should an AI teammate help carry first?"*

02 THE WORKFLOW LINEUP

AI for roofers should start with a clear lineup.

Most roofing companies do not need a custom AI strategy from scratch. They need to choose from a practical lineup of high-value workflow lanes. Here they are.

WORKFLOW LANE	BEST FOR	WHAT THE AI TEAMMATE DOES	PROOF METRIC
01 Estimate & Proposal Factory	Estimators are overloaded or proposals take too long	Prepares proposal drafts from inspection notes, measurement reports, pricing rules, photos, and CRM data	Estimates prepared per week, estimator hours saved, turnaround time
02 Pipeline Recovery & Long-Term Follow-Up	Old estimates, budget quotes, and commercial opportunities go quiet	Finds stale opportunities, drafts soft follow-ups, summarizes job history, and keeps the company top of mind	Revived opportunities, booked calls, recovered revenue
03 After-Hours Intake & Missed-Call Capture	Calls and forms arrive when the team is busy or closed	Qualifies the customer, sets expectations, books appointments, and escalates emergencies	Missed calls recovered, appointments booked, response time
04 Sales Cycle & Forecast Intelligence	Leadership does not know what will close or when	Tracks pipeline stages, estimate age, follow-up gaps, likely close windows, and source performance	Forecast confidence, aged pipeline reduction, rep follow-up compliance
05 Admin & AR Assistant	Office staff spend time filing invoices, chasing payments, or sending reminders	Files supplier invoices, monitors unpaid invoices, prepares payment reminders, and alerts on new payments	Admin hours saved, invoices filed, AR touched
06 Production Readiness Watchdog	Jobs stall after approval because prerequisites are scattered	Checks permits, HOA, material orders, signed contracts, worksheets, and missing documents	Jobs flagged before delay, missing docs resolved, production handoff quality

WORKFLOW LANE	BEST FOR	WHAT THE AI TEAMMATE DOES	PROOF METRIC
07 Marketing Channel Lab	The company wants more leads but cannot tell which channels work	Tests and tracks radius mailers, reviews, LSA, Meta leads, storm outreach, referrals, and aged lead reactivation	Cost per booked inspection, lead source quality, booked jobs by channel

The best first project is usually not the flashiest one. It is the one where:

- the source data already exists,
- the workflow repeats often,
- a human can approve the output,
- the result can be measured, and
- the company feels the pain today.

03 THREE COMMON STARTING POINTS

The lanes most roofers should pick from first.

1

STARTING POINT 01

Estimate & Proposal Factory

Use this if your estimators are maxed out, proposals take too long, you want to grow without hiring another estimator, your proposal format should be consistent every time, or your inspector could gather data while someone else prepares the package.

THE TEAMMATE CAN

- Read measurement reports from EagleView, GAF QuickMeasure, or similar sources
- Pull job notes and customer context from the CRM
- Organize photos, inspection notes, roof type, pitch, scope, options, and exclusions
- Apply company pricing rules and proposal standards
- Generate an approval-ready estimate or proposal draft
- Route the draft to the right person for review
- Upload the approved document back to the job record

HUMANS STILL OWN

- Final pricing judgment
- Margin calls
- Unusual scopes
- Customer-facing approval
- Legal or contract terms
- Anything where the roof, customer, or business risk is not standard

Why this works. Estimating is one of the clearest AI use cases in roofing because it has a measurable cost. If the company needs two more estimators to support growth, and AI can prepare drafts fast enough for a lead estimator to review instead of build from scratch, the ROI is easy to explain. The goal is not to remove expertise — it is to move expert time from *typing and assembling* to *reviewing and deciding*.

2

STARTING POINT 02

Pipeline Recovery & Long-Term Follow-Up

Use this if old estimates sit in the CRM, commercial or multifamily budget quotes have long sales cycles, reps call a few times and then move on, customers are not ready now but may be ready later, or leadership wants a better weekly view of what needs attention.

THE TEAMMATE CAN

- Scan open, pending, rejected, inactive, or aged opportunities
- Identify who has not been touched recently
- Summarize prior work at the property
- Prepare a short, polite follow-up for the account manager
- Attach or link prior estimates
- Suggest whether the customer needs updated pricing
- Build a weekly pipeline report for the sales leader
- Show who to revive, who needs follow-up, and who to leave alone

HUMANS STILL OWN

- Relationship judgment
- Whether to send a particular message
- Sensitive account handling
- Pricing updates
- Large commercial deal strategy

Why this works. Roofers often already paid to create the lead and estimate. If a \$100,000 project sits for six months, that does not always mean the customer is gone. It may mean they are waiting on budget, approval, financing, board timing, or another contractor. The teammate does not need to be aggressive — often the highest-performing message is simple:

"Just checking in. If you'd like us to refresh the numbers or talk through timing, we're happy to help."

That kind of follow-up is easy to skip when humans are busy. It is exactly the kind of work an AI teammate can keep organized.

3

STARTING POINT 03

After-Hours Intake & Missed-Call Capture

Use this if calls arrive while everyone is on a roof, web forms get handled later, after-hours emergencies need triage, the company wants faster speed-to-lead, or the front office is overloaded.

THE TEAMMATE CAN

- Respond immediately to missed calls, forms, or emails
- Ask discovery questions
- Identify emergency vs. non-emergency needs
- Set expectations on response time
- Schedule an appointment if appropriate
- Alert the on-call lead for true emergencies
- Send the management team a clean summary

HUMANS STILL OWN

- Emergency dispatch rules
- Final scheduling policies
- Exceptions
- Customer commitments that create risk

Why this works. Speed matters in roofing. A customer with a leak, storm concern, or urgent roof issue may call multiple companies. If one responds quickly and professionally while another waits until the next day, the faster company often gets the appointment. The teammate is not just an answering service — it is part of the operating workflow, capturing structured information and pushing it into the right system so the team can act.

A chatbot answers questions. A teammate does work.

An AI teammate is not just a chatbot. A chatbot answers questions. **An AI teammate performs work inside a business workflow.** In a roofing company, that can mean:

Reading a CRM record

Finding open estimates

Checking job documents

Drafting customer follow-up

Preparing a proposal package

Watching for stalled jobs

Alerting the right person

Filing an invoice

Building a weekly report

Publishing a live dashboard

The teammate usually shows up where your team already works — Microsoft Teams, Slack, email, shared inboxes, CRM records, shared drives, spreadsheets, or a private dashboard link.

The important difference is that the teammate is **connected to the work**. It is not sitting in a separate browser tab waiting for someone to copy and paste information into it.

An AI agent needs five things.

The word "agent" gets used loosely. For a roofing company, it is more useful to think in plain operational terms.

01

Access

The agent needs permission to read the systems involved in the workflow — CRM jobs and contacts, emails and attachments, measurement reports, PDFs, invoices, calendars, marketing source data, accounting or payment status, and job documents.

Access should be scoped. The agent should only get what it needs for the approved workflow.

02

Skills

A skill is a repeatable workflow the agent knows how to perform — create an estimate draft, scan unpaid invoices, check for missing production documents, find open estimates with no follow-up, prepare an after-hours call summary, or build a weekly sales pipeline report.

The skill is not just a prompt. The best skills combine AI judgment with deterministic steps: scripts, rules, templates, checks, and approval gates.

03

Rules

Roofing workflows need guardrails. Do not send customer-facing emails without approval. Do not invent measurements. Do not change pricing without human review. Do not duplicate follow-up messages. Do not touch dead, duplicate, warranty, or excluded jobs. Route emergencies to the right person. Log what was done.

Good AI operations are not "let the model decide everything." They are controlled workflows where the AI does flexible work inside clear rules.

04

Memory

The teammate needs to remember company-specific standards — preferred proposal language, pricing rules, draw schedules, warranty language, service areas, sales process, who handles what, customer communication style, document folder rules, and escalation rules.

This is where the teammate becomes specific to *your* roofing company instead of generic.

05

Human Approval

The best starting workflows keep people in control. The teammate prepares work; a human reviews and approves the parts that matter — proposal drafts before sending, follow-up batches before sending, large pricing decisions flagged, uncertain job matches escalated, exceptions routed to a manager.

That is how AI becomes useful without becoming reckless.

06 WORKING WITH YOUR SYSTEMS

No rip-and-replace. Connect to what already runs the lane.

Most roofing companies do not want to replace their stack just to try AI. They already have tools — the problem is that the tools do not always work together. Common roofing systems include:

AccuLynx

Leap

ProLine

JobNimbus

CompanyCam

EagleView

GAF QuickMeasure

QuickBooks

Outlook

Gmail

Microsoft Teams

Slack

Google Ads

Local Services Ads

Spreadsheets

PDFs

Shared drives

Phone & texting tools

Marketing platforms

An AI teammate should not force a rip-and-replace project. It should connect to the systems involved in the **first** workflow and expand from there.

EXAMPLE · ESTIMATE WORKFLOW

CRM

Measurement report

Job notes

Price book

Proposal template

Email / Teams approval

Document upload

- 1 A job reaches the estimate-needed stage.
- 2 The teammate gathers job details, notes, and measurements.
- 3 It prepares an estimate package.
- 4 It flags missing or uncertain information.
- 5 It sends the draft to the estimator or owner for review.
- 6 After approval, it files the estimate and updates the job record.

EXAMPLE · PIPELINE RECOVERY WORKFLOW

CRM

Email

Prior estimates

Calendar / task list

Reporting dashboard

- 1 The teammate scans open and aged opportunities.
- 2 It identifies customers with no recent touch.
- 3 It summarizes the account and prior work.
- 4 It drafts a soft follow-up.
- 5 The account manager reviews and sends.
- 6 Replies are routed back to the right person.
- 7 A weekly report shows revived opportunities and next actions.

EXAMPLE · AR WORKFLOW

CRM

Invoices

Email

Accounting / payment status

Teams / Slack alerts

- 1 The teammate scans unpaid invoices.
- 2 It groups them by age and balance.
- 3 It prepares a clean review list.
- 4 The office manager chooses which reminders to send.
- 5 The teammate drafts reminders and logs activity.
- 6 New payments trigger an alert.

A simple scorecard.

QUESTION	WHY IT MATTERS
Does this workflow happen every week?	AI pays off faster on repeatable work.
Is there clear source data?	The teammate needs somewhere reliable to read from.
Is the output valuable?	Saving time on low-value work is less compelling.
Can a human approve the result?	Approval keeps early deployments safe.
Can we measure the outcome?	If you cannot measure it, you cannot prove ROI.
Does the team already feel the pain?	Adoption is easier when people want the help.

GOOD FIRST WORKFLOWS

- Estimate prep
- Stale estimate follow-up
- After-hours lead capture
- Unpaid invoice review
- Weekly pipeline reporting
- Missing document checks

POOR FIRST WORKFLOWS

- Vague "AI strategy"
- Broad company-wide automation
- Replacing human sales judgment
- Fully autonomous customer comms with no approval
- Workflows where the data is messy and nobody owns cleanup
- Marketing campaigns before lead source tracking is in place

AI should be sold against a business case, not magic.

Here are practical ways to measure value. Each lane comes with questions to ask and outcomes to measure.

Estimator Capacity

ASK & MEASURE

Estimates created per month

Hours each one takes

Estimates needed to support growth

Whether that means another hire

Turnaround time & prepared/week

Review time vs. build time

Revenue capacity without headcount

Pipeline Recovery

ASK & MEASURE

Open / old estimates in the CRM

Total dollar value

No follow-up in 30 / 60 / 90 / 180 days

Project types with long cycles

Reactivated opportunities

Booked follow-up calls & recovered revenue

Average age of open pipeline

After-Hours Intake

ASK & MEASURE

Calls missed

Forms arriving after hours

How fast the team responds today

Missed contacts that become appointments

Response time

Emergency escalations handled

Lead-to-appointment conversion

Admin & AR

ASK & MEASURE

Who follows up on unpaid invoices

Time invoice filing takes

Supplier invoices sitting in email

Payments needing manual tracking

Admin hours saved & invoices filed

Unpaid invoices touched, payment alerts

Reduced interruptions for office staff

Production Readiness

ASK & MEASURE

How often a job stalls after approval

What's missing — permit, HOA, materials, contract, worksheet, selection, doc

Who notices the problem today

Jobs flagged before delay

Missing prerequisites resolved

Fewer late handoffs & better meeting visibility

Four bottlenecks, four first moves.

PATH A · THE ESTIMATOR IS THE BOTTLENECK

Estimate & Proposal Factory

FIRST 30 DAYS

- Map current estimating process
- Collect sample proposals
- Define pricing and approval rules
- Connect CRM and measurement sources
- Generate draft proposals for review
- Track time saved and turnaround

EXPANSION

- Customer follow-up
- Proposal revision handling
- Signed contract monitoring
- Production handoff

PATH B · THE PIPELINE IS FULL BUT UNCLEAR

Pipeline Recovery & Sales Intelligence

FIRST 30 DAYS

- Scan open estimates and aged opportunities
- Separate hot pending work from long-term pipeline
- Prepare account-manager review emails
- Draft soft follow-ups
- Build a weekly pipeline report
- Track revived opportunities and next actions

EXPANSION

- Quarterly pricing refreshes
- Commercial and HOA nurture
- Forecast model by division and project type
- Source attribution

PATH C · LEADS ARE GETTING MISSED

After-Hours Intake & Missed-Call Capture

FIRST 30 DAYS

- Map inbound sources
- Define qualification questions
- Define emergency escalation rules
- Connect forms, calls, texts, email, and CRM
- Launch human-reviewed booking workflow
- Track booked appointments and response time

EXPANSION

- LSA / Meta lead response
- Radius campaigns
- Referral engine
- Review requests

PATH D · ADMIN IS THE HIDDEN CONSTRAINT

Admin & AR Assistant

FIRST 30 DAYS

- Scan unpaid invoices
- Identify supplier invoice filing workflow
- Define reminder approval rules
- Generate daily or weekly AR report
- File invoices to the right job records
- Track admin time saved

EXPANSION

- Payment monitoring
- Job costing support
- Production readiness checks
- Closeout reminders

Narrow enough to prove. Useful enough to matter.

WEEK 1

Map the Workflow

GOALS

- Identify the starting lane
- Document the current process
- Confirm source systems
- Define approval rules
- Collect examples
- Agree on proof metrics

DELIVERABLES

- Workflow map
- System access checklist
- Success metrics
- First skill definition

WEEKS 2-3

Build & Test

GOALS

- Connect the relevant systems
- Build the first workflow skill
- Test on real examples
- Tune output to company language and rules
- Add guardrails and approval gates

DELIVERABLES

- Working AI teammate workflow
- Draft outputs
- Exception handling
- Review process

WEEKS 4-6

Run & Measure

GOALS

- Run the workflow on live work
- Measure time saved or revenue recovered
- Refine the rules
- Document issues
- Decide what to automate next

DELIVERABLES

- Pilot results
- ROI readout
- Recommended next workflow
- Ongoing operations plan

II WHAT THE TEAMMATE REPORTS

Turn AI from a mystery cost into an operating system.

Roofing owners should not have to wonder whether the AI is doing anything. A useful teammate produces simple operating reports.

Weekly Pipeline Report

SALES

New estimates created

Estimates sent

Estimates with no follow-up

Aged opportunities by bucket

Likely revival candidates

Customers needing AM review

Booked follow-ups

Closed / won / lost movement

Estimate Automation Report

PRODUCTION OF PROPOSALS

Drafts prepared

Approved drafts

Revisions requested

Blocked estimates

Average turnaround time

Common missing inputs

Estimated hours saved

Admin & AR Report

OFFICE

Unpaid invoices by aging bucket

Reminders prepared or sent

New payments received

Supplier invoices filed

Unmatched invoices needing review

Total outstanding balance

Production Readiness Report

OPERATIONS

Approved jobs ready to schedule

Jobs missing permit docs

Jobs missing material orders

Jobs missing signed contracts

Jobs missing worksheets

Stalled jobs by age

12 WHAT TO ASK ANY AI VENDOR

Twelve questions before you hire anyone.

- 01 Which roofing workflow are we starting with?
- 02 Which systems does the workflow need to read from?
- 03 Which systems does it need to write to?
- 04 What actions require human approval?
- 05 How do you prevent duplicate customer messages?
- 06 How do you handle exclusions, dead jobs, warranty jobs, and test records?
- 07 How do replies get routed back to the right person?
- 08 How do you prove what the agent actually did?
- 09 How do you control usage costs?
- 10 What happens when the CRM changes?

- 11 Can the first workflow become a reusable skill?
- 12 What report will show whether the pilot worked?

If the answers are vague, the project is probably vague.

13 COMMON CONCERNS

The honest answers operators ask for.

"Our company is different."

Yes, in the details. But most roofing companies still follow a familiar operating pattern: **call, inspect, estimate, follow up, produce, invoice, collect, close out**. The AI teammate should respect the 5% that is unique while automating the 95% that repeats.

"Will this replace our people?"

The best first deployments do not replace people. They remove the repetitive prep, monitoring, filing, and chasing around the people. Estimators still approve estimates. Salespeople still own relationships. Office managers still control customer communication. Production leaders still make scheduling decisions. The teammate carries the repetitive work so humans spend more time on judgment.

"What if our data is messy?"

That is common. AI can help find and clean some messes, but messy data should not be ignored. If CRM discipline is poor, start with a workflow that includes review and reporting before full automation — duplicate cleanup, repair library cleanup, missing field reporting, stale pipeline reports, document folder audits.

"What about cost?"

There are usually three cost categories: setup and integration, ongoing managed operations, and usage costs such as model tokens, third-party APIs, direct mail, measurement reports, or ad spend. The better question is not "What does AI cost?" — it is *"Which workflow pays for the first deployment?"* For one company that may be estimator capacity; for another, recovered pipeline; for another, after-hours booking. Start where the math is easiest to prove.

"What is a token?"

A token is part of how AI providers meter usage — in plain terms, the amount of text and context the model reads and writes. A simple task may use very little; a task that reads hundreds of PDFs and long job histories uses more. The important part is not the technical definition — it is usage visibility: which workflow is using spend, whether caps are in place, whether cheaper models can handle simple tasks, whether expensive models are reserved for judgment-heavy work, and whether the value exceeds the usage cost.

AI for roofers should not start with hype. It should start with a workflow.

Pick one lane:

Faster estimates

Revived old quotes

After-hours intake

Pipeline intelligence

Admin & AR

Production readiness

Marketing channel testing

Connect the teammate to the systems that already run that lane. Keep humans in control of the decisions that matter. Measure the result. Then add the next skill.

That is how AI becomes a practical teammate instead of another tool nobody knows how to use.

WHAT'S NEXT

Book a Roofer AI Workflow Review

Bring your current bottleneck, CRM workflow, estimate volume, and one example of a process your team repeats every week. We will help identify the best starting lane, the systems involved, the approval rules required, and the proof metric that would make the project worth doing.

Your current bottleneck

CRM workflow

Estimate volume

One weekly repeating process

You do not need to know what to automate before the conversation. Just bring the bottleneck — we will take it from there.

CONTACT US

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