

LOOK LIKE A PRO, THINK LIKE A PRO, RESPOND LIKE A PRO – AND WIN

BY ALICIA MCMAHON

The team of Bill Baley and Chuck Chapman provided keen insight to the Best of Success audience in its dialogue titled "Think Big: Establishing Processes and Procedures." According to Baley, president of C.I. Services in Mission Viejo, Calif., and Chapman, president of Tecta America Arizona, the process of improving your business starts with re-examining the fundamental questions: Who are you? What is your company? Who or what do you want to be? What did your original business plan look like? Do you even have a business plan?

"If you don't have a plan, if you don't have a map, if you don't know which road you are on, of course you'll feel like you're going nowhere, because you don't know where it is you're supposed to be going in the first place," Chapman said.

The key to business success is to develop a plan and execute every part of it like a top-flight professional. "The difference between an amateur and a professional is discipline more than anything else," Baley said. "Have you disciplined yourself to handle your business the way a professional does? It really comes down to some basic things."

A company's size shouldn't matter,

noted Chapman. Perception matters. "Professionals are on all levels," he said. "I don't care if you are a one-truck roofing contractor that services the heck out of your neighborhood, state or region – you can be and should be every bit as professional as the guys doing \$20 million a year. There's no difference."

Baley agreed. "You don't have to be a big contractor – you just have to think like one."

People will buy from someone that makes them feel comfortable about their decision, noted Baley. They choose a roofing contractor based on their belief that the contractor will deliver quality.

Baley and Chapman offered some tips to help contractors who feel like small fish in a big pond gain a professional edge. They recommended joining national, regional and local roofing contractors' associations, where they could network with and learn from successful contractors in the field. "These are the guys you should get next to," Baley said. "These are the guys you should ask a lot of questions. They can teach you so much."

Succeeding in today's marketplace depends on defining your goals, building your company's image and looking like a professional at all times. For example, trucks should be clean, presentable and serve as rolling billboards advertising your services. Every company needs a logo, business cards, letterhead and a website, and they should be professionally designed and work well together. Chapman and Baley suggested using the website to highlight the company's abilities and successful projects, as well as manufacturer certifications and letters of



recommendation.

Baley and Chapman believe every company must have a manual that details policies and procedures for every process the company follows, from the initial phone call, to the preparation of the work order, to the dispatching of the crews, to the actual work, safety planning, invoicing and collecting payment. Policies and procedures should be periodically reviewed, updated and changed as needs arise. "If something's not working, kill it right away," Baley suggested. "If you want to find out if something is not working, ask the people who use it. They'll tell you."

Establishing best procedures office-wide can help keep everyone pulling in the same direction – and impress customers. "Our goal is always to get a customer and keep them forever," Baley said. "Think big and you'll win."

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BEST OF SUCCESS SEMINAR



Chuck Chapman

The Best of Success session featuring Chuck Chapman and Bill Baley was presented as a live webinar. To view the archived version on demand, just visit www.bestofsuccessconference.com.



onsite attendees, the *Roofing Contractor* team felt it was time for others to get in on some of the Best of Success action, so it created a new opportunity to view select sessions remotely. "Best of Success has always focused on cutting-edge technology, and this year we added something new: we aired select sessions from the conference as live webinars," Bloom said. "The webinars are also now available on demand, so those who were unable to attend in person can still tap into the expertise of the speakers. We are confident that once people get a glimpse of the conference online, they will be excited to join us in person next year and make the most of the networking opportunities."

Those who did attend this year's event embraced the rare opportunity to exchange ideas, share experiences and form relationships with their peers.

"Best of Success 2013 really delivered as the most dynamic of the many ways *Roofing Contractor* delivers great information to help our readers succeed in their roofing businesses," Editorial Director Rick Damato said. "I consider all of the many forms of media we deliver to be dynamic. But of all the great offerings, Best of Success is the only one that is face to face — and sometimes in your face — where industry leaders meet to discuss the topics that are driving their roofing businesses today. It does not get any more dynamic than that."

Answering the Tough Questions

In a gripping panel discussion titled "Tough Questions Roofing Owners Should Ask Themselves Today," Kevin Gwaltney, president of Diamond Roofing in Manhattan and Dodge City, Kan., shared the story of his family business and its struggles after the untimely death of his father. Moderated by Steve Little, president of KPost Company, the panel discussion featured Gwaltney and Joe Bazzano, COO of Beacon Exit Planning, whose expertise was tapped by the Gwaltney family.

Gwaltney characterized his company as the very definition of a family business. Everything changed when his father, Rick, the founder and president of the company, suddenly passed away. His father's energy, passion and leadership were undeniable, noted Gwaltney. "He was the drumbeat of our company," he said.

Gwaltney had been trained to take over the company one day, but now he had to do so in a hurry, as his family prepared for the funeral of its patriarch. "Now I needed two of me," Gwaltney said. "We knew we had to secure our family first."

The next step was to solidify the business relationships, including the employees, customer base, sales representatives, manufacturers and other partners. "Every relationship we have, we have to rethink and rekindle," he said. "It took time and effort to solidify our customer base and our position in the industry."

They also had to make sure the business was financially sound. "We wanted to protect mom's interest, and leave enough assets in the company to continue doing business and preserve his legacy," Gwaltney said. "Trying to get money out tax efficiently was a big concern for our consultants."

The Gwaltney family called on Beacon Exit Planning to help them sort through the options. Bazzano had handled similar tragic situations before. "Unfortunately it happens all too frequently," he said. "I still remember the day I met with Kevin's family. The



› A panel discussion on succession planning featured (from left) Joe Bazzano, Kevin Gwaltney, and Steve Little. The session was titled "Tough Questions Roofing Owners Should Ask Themselves Today."

emotion was overwhelming."

The key was to forge a plan to move forward, but the person who had all the answers was no longer there. Rick Gwaltney had set up a will, a life insurance plan and a trust, but unfortunately there was a lack of integration in the plans. The accountant, attorney and insurance salesman had not communicated with each other. There was no overall directive or instruction as to how to proceed if the various documents were in conflict with each other.

"Big problems can be resolved by being proactive," Bazzano said.

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