

The JobNimbus logo features a white cloud icon to the left of the text "JobNimbus" in a white sans-serif font.

JobNimbus

Contractor's
**SURVIVAL
GUIDE**



Uncertain Times

As the COVID-19 pandemic continues to grow, more and more companies are being forced to adapt to new norms.

In times like these, it's hard to know what to do next or how to handle running business.

Our goal is to **help contractors like you** stay productive and grow your business, no matter what's going on around you.

We've made a quiz to help gauge how prepared you are...

Ready to test
how prepared you are?

TAKE THE QUIZ

Come back here when you're done!

How did you score?

We understand how the transition to a remote workforce can be difficult, but the JobNimbus team has mastered remote work over the last 8 years.

Our [**Contractor's Survival Guide Webinar Series**](#) (March 26 - April 16) will give you in-depth details on each of the topics we are about to touch.

Let's get started...

Getting Set Up to Work from Home

- Find a way to talk to your **customers**
 - You can use an app like [Zoom](#), a remote video conferencing service that lets you host and join online meetings, chat, and collaborate via cross-platform messaging and file sharing.
- Find a way to talk to your **employees**
 - We personally like to use [Slack](#) to communicate with our employees. Slack is an instant messaging platform that keeps conversations organized and gives everyone on your team a shared view of progress and purpose.
- Get simple **CRM software**
 - CRM software like [JobNimbus](#) gives businesses the right tools and integrations to update customer information, track interactions, and manage customer accounts. Adopting CRM software will help ensure a higher customer retention and customer satisfaction rate while you're working from home.

Getting Set Up to Work from Home (continued)

- Write, edit and share **documents**
 - For all your business documents, [Google Docs](#) is the way to go. Simply login to your Google account and access, create, and edit your documents from any device and wherever you are, even when there's no connection.
- Forward calls from the office to **mobile**
 - Don't forget to adjust your office phone calls so they forward to your cell phone before heading home. If you have a landline at work, you can easily enable call forwarding so you can still receive business calls.
- Organize **structured meetings**
 - Stay up-to-date with your team on job progress by arranging structured daily or weekly meetings with a planned out agenda. The [JobNimbus mobile app](#) lets you easily schedule appointments, tasks, and meetings for yourself and others.

Sales

- Follow **sales guidelines**
 - Write out what you would normally do in a sales meeting and follow those steps from home.
- Use JobNimbus **mobile features** to communicate with customers
 - Send photos, videos, contracts, reports, invoices, and more electronically to your customers.
- Offer to **not enter customers' homes** for exterior projects
 - Provide customers the option for you to deliver materials, samples, etc. and leave them on their doorstep.
- Create a **virtual sales presentation**
 - Make your own virtual sales presentation or use a template to help get your outside sales team become an inside sales team.

Lead Generation

- Look at **past campaigns**
 - Review what strategies have already brought you success in your business.
- Help your **online reputation**
 - Use [Podium](#) to gain reviews, get people talking about your company, and make interacting with your customers as convenient as possible.
- **Collect referrals** to bring in valuable new clients
 - Rather than investing your money and effort into social media and paid ads, consider [mastering your referral process](#). It's free to ask for them and effective for your business.
- Let your customers know that **you're available**
 - Some customers might assume that due to the COVID-19 outbreak, your business is postponed. Reach out to your customers to let them know that you're available to do it all remotely.

Lead Generation (continued)

- Don't cut **marketing spend**
 - During an uncertain market, keep investing in your business. Continue your company's expenditure on marketing activities and stay relevant with your audience.
- Track what **roofs have been damaged**
 - [HailTrace](#) lets you keep track of weather events to find opportunities to fix damaged roofs and help new clients.
- Apply **marketing best practices**
 - Use [marketing best practices](#) to grow your business and accomplish business goals for the entire year.

Managing Your Team

- Use your **CRM**
 - Manage your entire team remotely with a web-based CRM.
 - Have one place to access all customer information and team communication.
- Invest in **tools & equipment**
 - Make sure employees have the tools and equipment they need to work effectively.
 - Train them to use your software and process.
 - Great tools will last longer and will yield a higher return on investment.
- Practice team **social distancing**
 - Prevent intercompany infection by having remote meetings and accessing your work documents online.

Managing Your Team (continued)

- Create **team accountability**
 - Working remotely makes having a structure for accountability more important.
 - Hold regular meetings (daily and weekly) to check in with each team member. Ask the following questions each time:
 - What did you do yesterday?
 - What are you going to do today?
 - What's holding you back from those items?
 - What questions do you have?
- Get **visibility** with CompanyCam
 - Keep an eye on all jobs in estimating and production with photos from the job site.

Production

- Get material orders **under control**
 -
- **Automate** routine processes
 -
- Assign **work orders**
 - Your subs are also going to be affected during these situations. You need to help provide structure and clarity.
 - Assign work orders to track them on your calendar and share job info to boost communication.
- Leverage **integrations**
 - Connect Beacon with JobNimbus to order materials online and get order status updates.
 - Hook up Eagleview with JobNimbus to measure roofs remotely and prepare more professional estimates for your customers.

Manage Your Money

- Keep on top of **open invoices**
 - Create reports to compile invoices with an open balance.
 - Meet with your bookkeeper if need be.
- Collect due **funds**
 - Offer digital payment options to customers to increase collection rate.
 - Use a payment processor like WePay to accept credit cards, debit cards, and ACH (e-check) payments.

Register for our *free webinar series*:

Contractor's Survival Guide

Best practices & tools for thriving in uncertainty
with JobNimbus and special guest partners.

REGISTER FOR WEBINAR SERIES