



## American Roofing takes process efficiency mobile with Smartsheet WorkApps

Smartsheet WorkApps helps American Roofing & Metal create easy-to-use, mobile-friendly solutions that save its roofing crews and warehouse teams time and money and improve management of safety training certifications.

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**Our new Industrial Department cuts across every division of the company, so we needed to simplify the experience so people weren't sifting through information they didn't need, which is why we assembled an Apps-based workflows solution. With another system we had to build three versions of an app; with WorkApps, we can now create one app and control appropriate access through roles, which is a significant benefit.**

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Rob Waite, Executive Vice-President,  
American Roofing & Metal



**Customer:**

American Roofing & Metal

**Industry:**

Architecture, Construction and Engineering

**Organization Size:**

Medium (50 - 999 employees)

**Region:**

North America

**Website:**

[americanroofingonline.com](http://americanroofingonline.com)

### Customer Profile

American Roofing & Metal, Inc. is a family-owned roofing business based in Louisville, Kentucky. Over more than 100 years, American Roofing has earned a steady reputation for providing quality-roofing solutions for residential, commercial and industrial customers.

### Background

American Roofing & Metal uses Smartsheet to automate and professionalize its business processes and burnish its image as a major regional contractor. After creating Smartsheet solutions for purchasing and hiring, Rob Waite, executive vice president of American Roofing, saw a need to more seamlessly connect the company's information platforms and optimize access for the many employees who only use mobile devices for business data. With Smartsheet WorkApps, Waite created role-tailored custom apps, all without writing a line of code.

*"WorkApps is a workflow management tool," Waite says. "It gives us an easier way to put everything in one place so everybody knows where to find what they need. We can organize processes step by step. The transparency and the ease of access help us catch things that would otherwise have been missed and would have to be redone later. It's improving our productivity, reducing the amount of administrative time people spend, and dramatically improving the quality of work: There's a lot more being done right the first time."*

### Solution

From its beginnings as a small local business, American Roofing has grown to serve residential, commercial, and industrial customers in Louisville, Lexington, Cincinnati, and a broad surrounding region. Smartsheet has been part of the company's growth, powering process efficiencies for purchasing, hiring, and other administrative work. As growth continued, Waite wanted more effective ways to selectively share data in formats that would be easy for workers at a job site to use on their mobile devices. He also wanted to automate the process of sharing data between business systems without creating import errors.

WorkApps proved to be the solution to bring Waite's vision to life. The no-code platform makes it easy to create purpose-built custom apps that can be tailored to the business and even designed with brand colors and logos. Waite says building apps is intuitive and easy for anyone who's already familiar with Smartsheet.

### Customer:

One key benefit is that the apps are optimized for mobile devices; Waite says that because most of American Roofing's workers spend their days on a work site instead of in an office, mobile devices are the main point of access to the company's network resources.



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## Boosting productivity on job sites with work and safety solutions

The first app Waite built with WorkApps meets one of the most important needs of the business. The Job Safety Audit app (JSA) supports an OSHA-required daily process in which foremen review safety protocols and processes with each worker who will be using specific equipment or performing particular tasks. Before WorkApps, the audit process required completion of checklists and other documentation that resided in several places, plus recording and uploading a video of the safety discussion. The JSA WorkApp combines a checklist template for each piece of equipment or task review with a simple utility for looking up existing certifications and a click-to-record prompt that automatically saves the audit video to the right place.

WorkApps seamlessly integrates functionality and workflows from Smartsheet premium products such as Dynamic View to enable creation of apps custom-designed to solve problems and simplify important processes.

*"We added Dynamic View to our plan and have added a Dynamic View we created to our PO Management App," Waite says. "It was a big hit and helped many managers advance their understanding of all that WorkApps can do for us."*

Other WorkApps that streamline work site safety and processes include a certifications manager that tracks training, paper-based and hands-on equipment operation, and OSHA paperwork to qualify workers for 13 different construction certifications, five of which are offered in both English and Spanish. There's also a job site info app that packages all the details of a current customer installation so workers can check status and next steps at the start of the day, and even click or tap to access GPS navigation to the worksite.

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*"Over time, I'm seeing that change order notices, warehouse requests, or purchase order requests that previously were coming in at 4 p.m. are now coming in before noon," Waite says. "That leads to quality and efficiency; you start freeing up hours that used to be spent chasing information in disparate locations, and that makes a big difference. Previously you could tell people were waiting till lunch, then getting in their truck, popping open the laptop, and wildly typing away to get something done before they had to get back up on the roof."*

### In a Nutshell:

American Roofing has 40-80 jobs in process each day, making it crucial for the warehouse staff to organize and verify requests as efficiently as possible. Before Smartsheet, requests came in via phone, fax, text message, Post-it note, or email.



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## Saving time and effort with warehouse requests

Warehouse requests are also being expedited with a dedicated WorkApp that enables foremen to digitally submit materials orders to be prepared for pickup at the start of the workday. American Roofing has 40-80 jobs in process each day, making it crucial for the warehouse staff to organize and verify requests as efficiently as possible. Before Smartsheet, requests came in via phone, fax, text message, Post-it note, or email.

*"It was the biggest source of frustration in the company, bar none," Waite says. "It became painfully obvious that having a well-documented, well-structured, automated process would really serve us well."*

The first step was to create a Smartsheet form to standardize material requests. Then with Document Builder, the warehouse team was able to create printable tickets to refer to while pulling the items for each order, which are then taped to the cart or truck when picking is complete. The printed ticket includes a QR code foremen can scan to acknowledge receipt when they pick up their materials. The system was converted into a WorkApps solution to optimize the request form for mobile and enable foremen to quickly check the pickup against the request, mark items as missing, or update quantities.

*"It made a huge difference for the warehouse because they're seeing requests instantly," Waite says. "The time when the warehouse had received all requests that needed to be picked before the end of the day moved from 5 p.m. to 2 p.m. It cut down on overtime tremendously. If people are working 6 a.m. to 6 p.m., you start getting turnover; they may be making good money, but after a while they don't like it. We were able to eliminate that."*

## Improving quality and accuracy in vehicle fleet management

WorkApps has also enabled American Roofing to cut costs and inefficiencies out of managing its fleet of more than 70 trucks, trailers, cranes, and other vehicles. Details from vehicle identification number (VIN) to engine specifications to tire mileage are compiled in Smartsheet, and data on odometer readings and other performance metrics is automatically captured and fed into the sheet from a device plugged into the vehicle's ODB port. That enables American Roofing to track fuel efficiency, meet deadlines for Department of Transportation (DOT) certifications, and schedule regular maintenance to ensure there aren't too many vehicles out of service at a time.



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## A framework for a new service offering built right in WorkApps

In addition to creating apps based on existing Smartsheet solutions, American Roofing is using WorkApps as a foundation for solutions that enable future innovation and growth. For example, the new Industrial Division offering combines a quick-response commercial roof repair service, and its Service Department provides roof inspections on a recurring basis to uncover problem areas and outline preventive solutions. Since roof leaks account for the largest dollar volume of insurance claims each year, the Service Department inspection certification helps customers save on their premiums. These solutions were built directly in WorkApps.

Waite says it’s easy to create powerful WorkApps that tailor information by role, bridge departments to bring together key information, and solve complex problems. But one of his favorite examples is a simple but important tool: a company contact manager that lists emails, phone extensions, and company cell phone numbers for everyone in the company. The contact manager is always up to date and quick to search; users can call or email a colleague with one tap. The WorkApp tailors access by role so that personal data is protected. That simple solution, Waite says, helps non-tech-savvy workers overcome their reluctance to adopt digital tools.

*“At first I was thinking we’ve got to knock their socks off to get user engagement,” Waite says. “But I’m still surprised at how intimidated people can be by basic technology. What helped us show people that these tools are going to help them and that these tools intuitively easy to use was the company contact manager. It was needed by all of our employees and previously was rarely up to date. The Contact Manager App we rolled out was so easy to use, and had the added benefit of making it much simpler to connect with others, that the experience helped users very quickly wrap their minds around what Smartsheet and WorkApps could do for them.”*

WorkApps has also enabled American Roofing to free up hours, increasing focus on accuracy.

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