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 STACK

Takeoff &  
Estimating  
Software  
for Roofers



**Attention all Excel users, this webinar is for you!**

**MODERATOR:**

- Heidi Ellsworth, RoofersCoffeeShop®, Partner

**PANELISTS:**

- Phil Ogilby, STACK® Technologies, Founder

**Heidi:**

Hello, and welcome to RCS webinars. We're so happy to have you here at Roofers Coffee Shop as we welcome Phil Ogilby, founder of STACK Technologies. This is going to be a great webinar today, I'm excited to learn a lot as new information about technology and as you all know this is an area near and dear to my heart but first let's get some housekeeping out of the way. So we are recording this and this webinar will be available on demand at

rooferscoffeeshop.com/webinar, you are all on mute so please feel free to use the chat box on your right hand side to deliver questions throughout the presentation. We don't want you to forget anything, so we'll be watching and if I can answer any chat I will, otherwise we will be asking those questions to Phil at the end of the webinar. And please we really do want to hear some of your thoughts and some of your questions.

**Heidi:** So let's get started, we have today, as I have said a presentation with Phil Ogilby of STACK Technologies, and it's going to be about Cloud technologies really being able to do estimating in the Cloud but using also your Excel, which mean you're used to using. And I'm excited today to have Phil here because we have met once or twice throughout the years at trade shows and different events and Phil used to be a roofing contractor as a former commercial contractor he turned into a software aficionado and industry leader. Phil possesses intimate knowledge of the pre-construction process including both the opportunities and pitfalls that face general and subcontractors in today's market. His passion for technology and the improvements to efficiency, productivity and quality, it can power drove him to create the industry's first ever bid-management platform iSqft, and which I remember personally seeing at shows, which experienced rapid growth and an eventual acquisition by Roper Technologies. Taking yet another step toward improving the bid process, Phil launched STACK, the first 100 percent cloud based takeoff and estimating platform designed to help contractors bid and win more profitable work.

**Heidi:** So I'm going to let all of you read the rest of that, but I am very excited because I think this is what our industry needs, we need contractors who understand the problems and bring a lot of common sense and who can really help the roofing industry go into the future and be able to really take on all the other trades and to be profitable and obviously, help with the labor. So that's what we're going to hear about a lot today, so Phil welcome to Roofers Coffee Shop.

**Phil Ogilby:** Thanks Heidi, happy to be here.

**Heidi:** I am so happy to have you and I would love it if you would share your history, especially your history of roofing, just your overall history. I think it's very inspirational, and I'd love for everyone to hear about it.

**Phil Ogilby:** Sure. Yeah, you bet. Yeah, it's quite a story. You know I started, I actually was a sheet metal worker years ago when I got out of high school, I went to work in the building trades I was a sheet metal worker and I got laid off in the early 80s, the economy really was struggling in those days. I remember interest rates at 14 and 15 percent if you went to buy a house, if you can imagine most folks can't even imagine that today but that was the reality back in the early 80s in the Jimmy Carter economy and things were really tough. And so I got laid off at a young age from the Sheet Metal Workers Union in Dayton, Ohio and didn't know what to do. So I wasn't happy taking on employment, I went and bought a book on how to put roofs on houses, and I started a roofing business, put an ad in the Yellow pages and much to my wife [inaudible 00:04:22] I came home and

said honey I just spent \$600 a month or something like that on Yellow pages ad, which was the Google of its day.

**Phil Ogilby:**

Anyway long story short I started in the roofing business within a few short years I made the transition from doing residential roofing to doing commercial roofing and probably by the time I was 25 we were doing a couple million bucks a year in commercial roofing in the mid 80s. And so that's how I got into it, happy to share war stories with any of you. I can remember, you know, literally almost burning down an Arby's restaurant on fifth street in Dayton, Ohio back in the day we were putting a roof on with modified Bitumen and using a torch, I don't know if you guys still use torches for that kind of stuff, but I had a big story around that. Ultimately, insurance paid for that and so I've got a lot of roofing stories but, yeah, I used to be in the roofing business.

**Phil Ogilby:**

Early on my older son Justin was one of those kids that sort of had a knack for the computer and so I remember bringing home our first every personal computer, that makes me really sound old and fuel, but I remember bringing it home, Justin was like 13 or 14 years old. And one day I came home, and he had like this game that he had written on the computer, shooting at each other and this is my teenage son, and I thought man that is the coolest thing I've ever seen. So I said, Justin what if we bought you some more books and maybe bought some software, and you could maybe create an estimating program that I could use in my roofing business? And so sure enough it took longer than I thought, it took more money than we thought but by the time Justin was 17 we'd sold about half a million dollars worth of our Buildware Pro estimating software. And obviously, at that point I made the decision to get out of the roofing business and get into the business of selling technology to contractors and so that's sort of my background.

**Phil Ogilby:**

From there just to kind of finish the story all the way to STACK, when the internet was born, and it gave me the idea, you know, I remember spending a lot of my time as both a residential and a commercial contractor, I spent a lot of time following up on invitations to bid from GCCC and stuff like that, going to plan rooms, physical plan rooms and literally driving in my car when sitting down with a scale ruler and measuring blueprints. When we designed Buildware, we made it so that you could measure digital blueprints, electronic PDFs or TIFFs or what ever with your mouse on screen. And so at the time people loved that at the trade shows, and we would show it but it was not very useful because there weren't very many sources for digital blueprints in those days. And that gave me the idea when the internet came along. What if we created an online kind of application that would allow a general contractor to manage invitations to bid and distribute their drawings electronically to their subs using this new thing called the internet?

**Phil Ogilby:**

That was in 1999, 2000 along the way I started, I wrote a business plan because that's what you did in those days, and I went out and started to talk to potential investors and eventually found a guy right here in Cincinnati who said, I'm not sure what you're doing but this was during the dot-com boom and everybody

was getting rich over these dot-com ideas, and my buddy Andrew Green says to me, I like you, I think you're going to succeed, and I'm going to give you half a million dollars. And so that's how I started what's now known as iSqft, iSqft.com. It's now part of ConstructConnect, and it's owned by Roper Technologies, I sold my shares a few years ago, but it's a very successful business in construction news.

**Phil Ogilby:**

I left iSqft about six or seven years ago to start STACK one of the things that frustrated me about the success we had at iSqft is that we helped kind of move the industry away from distributing paper plans to distributing PDF and TIFF files for blueprints but at the end of the day the poor subcontractor, the roofer, the guy that was back in my shoes when I started was stuck having to print those PDF files or whatever out to paper at their own expense. And that always frustrated me, and I thought you know I really have a lot of empathy for the trade contractors because I know how tough it is to make money as a trade contractor. And so that's really the spirit in which we built and designed STACK. And we wanted to make it super easy to use and that's what it is we're going to show you today but that sort of long winded story of my history Heidi, but I think most folks find it interesting and that's where I came from.

**Heidi:**

I think it's great, I think that's really important to be able to have the experience that you had and then bring that to the technology. And I know you kind of started telling, you know how you started STACK, but I'm interested in, like once you got going it looks like you worked with your wife and is it still Justin, your oldest son, who is still involved with your company?

**Phil Ogilby:**

Yeah, so Justin is still with us. Justin is 36 years old today and has kids of his own but... Yeah, he made a comment to me the other day, he's never worked for anybody else, which is kind of cool. So, we don't hate each other, and we still get along, and he still works with me at the business here and like I said he's been my partner since he was just a kid. But my wife Jane Baysore and myself and Justin started STACK back in 2010, and the real focus today is on simplifying construction, you know, a lot of folks with the technology you see in the market today is really complicated, it's hard to use, it doesn't make sense, and it doesn't, you know in many cases unfortunately it does add a tremendous amount of value to your business. And we wanted to simplify that and that's the spirit in which we're building, and we have designed STACK.

**Heidi:**

That's great. Well, I'd love hear just a little more about the impact that you're seeing, I mean I love that simplification I think we all need that when it comes to technology and talk to us a little about what is the impact of STACK on contractors, how's it helping them?

**Phil Ogilby:**

You know it's amazing to me, I'll tell you a funny story I was at the National Roofers Show a couple of years ago, and we had a booth, and we were set up there and this young guy comes up to me and introduces himself, and it's fun because you know a lot times people have seen me in a video, or they hear my voice, and it's familiar whatever and anyway he acted like he knew me,

introduced himself as a customer, and we were talking, and he was a user of our very first product, before we started STACK we started a product called Cloud Takeoff.

**Phil Ogilby:**

And this particular guy was like I said a roofing contractor, and he came up to me, and he said, hey... Introduced himself, and he said, you know, Troy and your office it wants full price for a second user of STACK, and I said, yeah. And he said well that seems like it's too much money, and I said okay, well let's talk about that, so tell me about your experience with the product and so and so forth.

**Phil Ogilby:**

And we spent about 10 minutes together, and I kid you not the guy sort of had tears in his eyes when we were done because he was like explaining to me how using Cloud Takeoff, prior to STACK, Cloud Takeoff using our last product really helped him weather the downturn, he didn't think they'd still be here after 2010, you know, with the economy being the way it was, but he felt like just automating his estimating helped him to the point it really kept him in business and held him to literally triple the size of the business from what they were back then.

**Phil Ogilby:**

And they have 40 more employees than they ever had before and so obviously he ended up sign up and adding an additional user, but it's fun. We have hundreds of five star reviews online you can Google STACK reviews, and you'll see we have hundreds and hundreds of them. And so many people tell us in fact we've got a bunch of videos coming out on our brand new website we're launching near in a couple of weeks but tons of these folks tell us about the big impact that using our product has on you.

**Phil Ogilby:**

If you think about it, you know if you're like most folks it takes a certain number of bids to win a project, so you have to bid... Most folks tell me, I have to bid three jobs, four jobs, 10 jobs, eight jobs to win a job. That's just the way our business works, it's the nature of construction and so what we do is we help you bid more work in less time with more accuracy than you've ever had in the past. So you're going to be more accurate, you'll have a better handle on what your final real true cost is when it comes time to negotiate, but the more important aspects to that from my standpoint is, especially in a busy market like this because it's not always going to be busy don't get comfortable thinking it is. It won't always be busy like this, you want to bid as much work as you can.

**Phil Ogilby:**

I mean you just can't have enough work, and I know you're saying we're covered up, I can't find help. You can solve those problems but what you really want to do is keep piling on the work to the extent that you can. And so this software helps you to grow your business, and it really has a big impact on the top line of the revenue line for your business and ultimately because you're going to miss fewer, make fewer errors during the estimate time, you're going to put more money in your pocket, but you can read our reviews you'll see we are having a huge impact and tons of people's businesses all over the country with STACK.

**Heidi:** You know I love that and I think it's exactly what's needed because with the labor shortage with the challenges and the extreme growth in construction especially commercial, the contractors need every piece of help they can get and technology is really the answer to help processes and efficiencies and even not [inaudible 00:14:23] as many people but being able to bid and get more work. So I love it, let's...

**Phil Ogilby:** One thing I'll add to that before we move on just real quick, another thought I had is, I talked to a guy at a show about a month ago who's telling me that STACK has helped him to be more choosy about the work that he does win, right? So, because he can bid work so much faster he's able to pick and choose what jobs he is going to actually bid so that he's just getting the work that his company is set up to perform. So, that's just another Food For Thought on that, but it's kind of further proof of that same point.

**Heidi:** Really being able to make sure you're gaining the right business for your company and for your specialties.

**Phil Ogilby:** Right, exactly.

**Heidi:** Yeah, sounds good. I mean I know I'm a big Excel user and I know a number of roofing contractors, who have build some amazing Excel estimating programs and very complicated. I love this concept of being able to use something that you're familiar with as in Excel but now being really able to put it with the power of a software like STACK in the Cloud. Can you talk a little about how those two work together?

**Phil Ogilby:** Sure, you know I've been doing this... Now, you've heard my whole story I've been doing this a long time and, you know, virtually everybody you talk to from a contractor standpoint when you get down to looking at a finished estimate almost everybody will say, this is great except I want to see it this way, I want to see my cost per square foot, I want to see my cost per square, I want to calculate the labor cost based on hours per square or crew time or however you want to do it. And so there's no real single solution. Now most of the canned software you buy today, you know, you can go spend \$20,000 and buy a product like the Edge and they're going to force you to do things sort of their way. So, we built it with just the opposite approach in mind because we understand that everybody is going to want to see their numbers, and slice and dice their numbers just a little differently so we ultimately create...

**Phil Ogilby:** So using STACK you're going to create all the kind of critical data that you need, all of your measurements, all of your cost, all the quantities and materials and labor, however you want to calculate labor you can do that within STACK. And then we split that into Excel and I'll show you a couple of different ways if you got your own Excel solution today I'll show you a great tool that we've developed to help you get your data from the Cloud and from your measured data in the Cloud directly into your estimate. If you don't have a template, we've developed one we call it the project cost calculator and I'll give you a demo of

that here in a few minutes too, but you can take it and easily customize it and simply plug in your overhead, your profits, your tax, and you've got a finished number. So, we like the flexibility of Excel we think it makes our application much more useful at the final report if you will, can be customized by the end-user and there's no better solution for doing that than Excel.

**Heidi:** Yeah, and we have a lot of them and so for those contractors and you started to touch on this so those contractors who already have an Excel template set up, how does it work?

**Phil Ogilby:** Yeah, and again I'll show you that in a few minutes but fundamentally the STACK report sync we call it, it opens inside of Excel. So we built it as part of the Microsoft Suite, and it works both on a MAC or a PC, by the way, we have the only solution in the market that works on the MAC or the PC, but it works on a MAC or a PC. And you simply open Excel, open your template, and then you install the report sync as an add-in, and you'll see in a minute. You'll see the button and literally login to STACK directly through Excel, and it opens this little window on the right that has all your projects and all your reports. And then you can drag an entire report, or whole line item, or series of rows, or just individual quantity data and you can just select them and then hit a button and then send them into your spreadsheet.

**Phil Ogilby:** The really cool thing about it is that bottom bullet point there, which is it keeps your data synced up. So let's say, tomorrow you'll be back into the Cloud, you maybe make some changes to your drawing, or you takeoff, and then you come back into Excel, you don't need to re-drop those numbers in there or even remember that they've changed, you just hit your refresh button, and it will update those numbers automatically, but I'll show you kind of how that works in a brief demo as part of the overall demo in a minute.

**Heidi:** Perfect, and on the same thing with Excel estimating template, I know you're going to show this but if they currently don't have any template, you're able to help them get those in place?

**Phil Ogilby:** Yeah, that's right. So, we've got this thing is called the project cost calculator, we spent a bunch of time and money designing and building this thing, but it's really cool the way it works, and I'll show you but you can open the raw data that comes out of STACK, you just open it inside of Excel in this template and this template is free we don't charge for it. And you can see it's already customized you can add individual items and data, you can store your custom pricing and things like that in here and then you just plug in mark up, overhead tax, and profit, and the software does the work so. We'll show you both of these.

**Heidi:** That's excellent. Perfect. Okay, so we're going to go to the demo now so just real quick, if you could, just share a little about the fact that you're in the Cloud and that's a very good place to be for contractors.

**Phil Ogilby:**

Yeah, you're going to love it, it's funny when you do this long enough, when you get this perspective on history like I've got it's really interesting to look back and see, I mean 10, 15 years ago when I was starting iSqft people would say [inaudible 00:19:58] that's in the Cloud, shouldn't it be installed on my computer and I only want to pay once and all these things and what if something happens and somebody hacks into your website and all these terrible things? Well, now you're getting your bank account is on your phone, you can watch Netflix on your phone. People today, really appreciate the benefits of being in the Cloud and still STACK has been designed from the beginning to be a Cloud application and to that end it runs very fast and easy like you commented, we were joking about you being in Vegas right now.

**Phil Ogilby:**

Heidi, you can be in Las Vegas, you can be on vacation in Europe and anywhere you've got access to the internet you can pull up your data. If you're the boss, you can see what your employees are doing, review and approve estimates before they go out because you can login from any MAC, any PC anywhere you are in the world. So, you really get used to the convenience of having all these data available to you wherever you are, and, by the way, if your laptop or your hard drive crashes there're no worries, because we use the Microsoft Cloud and all this data is saved and it's always going to be available no matter what happens to your hardware. So, you'll love it and you won't want to go back once you've moved to the Cloud.

**Heidi:**

I love it. I'm going to switch right over to you and Phil, why don't you give us a demo, I'm really excited to see this, and we're going to go live here folks, so hang on. It's transitioning right now, there you go.

**Phil Ogilby:**

Are you seeing my calendar, did I show you the right screen?

**Heidi:**

Yes.

**Phil Ogilby:**

Okay, all right. Cool, let me move this over out of the way a little bit. There we go. So this is STACK, this is what you're looking at, before we get into STACK, and I'll tell you right off the bat, so this is the homepage for your company when you're a STACK user. And when I was in the business, my bid calendar projects I had to go bid on were sort of always the most important thing, so I created a report and always wrote it down put it on the calendar. So we made the calendar sort of the front-end of the software, so you can see here when you get a new project to bid, you'll just come over here, and you'll plug in the name of the project you'll specify a bid date for the project, and you know all that kind of stuff.

**Phil Ogilby:**

You can select who's going to bid the job within your company, who's going to work on it, who has access to it, specify the status of the job, if it's bidding, if it's submitted so on and so forth, the address and then it's created and launch it. And so that will put an icon on the calendar wherever your job is located on the calendar, and I'll take you in where you can upload either drawings or images from the field. And I know a lot you folks probably don't do a ton of work with



blueprints and so I'm going to show you as an alternative the other way you can use STACK if you don't have blueprints so. I'm going to come back to STACK in just a minute, I'm going to jump out I'm going to take you to Google Earth, right?

**Phil Ogilby:**

This is free, and most of you probably have access to it and if not you download it or install it but it's called Google Earth Pro. And you simply come up here and type an address. So, I'm going to type in the address of our old office, 6398 Thornberry Court, in Mason Ohio and I'm going to click on that button and then the program will take us to that location. So wherever your project is, and it can be a shingle roof, or it could be a flat roof doesn't really matter Google Earth Pro is going to take me in here. And so, you'll see I can zoom in. There's the building, sure enough. You do want to take note of the pitch, now with this method I'm showing you I don't have a great set of tools yet for calculating the slope, but you can get a good sense for the slope from here and obviously, you could verify it looking at a profile view or what have you but...

**Phil Ogilby:**

Zoom in nice and big, center it on your screen and whoever you're going to tell it the software you want to reset it based on tilt and that will flatten it out. So you want to be looking directly over the building or over the property and then we need to determine a know distance on this plants. Again you don't want to be looking at an angle or anything else so you want to use, view, reset the tilt when you get it zoomed up nice and big so it's full screen like this. Then the next thing I want to do is I'm going to use this little tool up here, you'll see a little toolbar for the ruler, and I want to draw a line that represents a certain distance on the screen, so when I take it into STACK, I'll be able to calculate my scale. Keep in mind I can not do the dimension, I really can't do the dimension on the roof it will only calculate it accurately on the ground.

**Phil Ogilby:**

So, you can see I can go from one point to the next this will be easy to remember that this is where I've drawn, but I've got about 148 feet and just double click there when I'm done. And then I'll save this and just say this is my line measurement, write that down and make a note of that particular dimension. Now, what you do is you come over, and you say I want to save this image, so I'm going to go File, Save the image and save it onto your computer. And so when you hit save image it will say where do you want me to save it? Let's say we put it in our downloads folder and give it a name and this is office building and whatever and we can just save it. So there it is saved, so now it's just like having a blueprint on your computer for it because I've got a line that I can scale from, and I've got the image that I can measure from.

**Phil Ogilby:**

So having said that, now I can come back into STACK let's create a new project here and I'm going to say this is my new sample, you know Shingle Roof, as an example and we'll just say create and launch. So it puts it on the calendar according to today's date and then it says okay, choose a local file. Now, I'm going to grab the image off my computer I'm going to go downloads, and I'm going to say office building, right there it is. And I grab it, this is okay, and I'll just say done. So, it just takes a minute or two and we've actually now uploaded it

into the Cloud, and we're converting it into an image that we can actually use and when you click on it, I can go in and do the work.

**Phil Ogilby:**

So at this point all I really need to do is I come down, and I hit the scale button, and I don't remember exactly because I was kind of in a hurry, but I think it was like 148 feet. So I'm going to say 148 feet and click okay, and the software says okay, draw a line that represents 148 feet. So I go from there and got to be careful there and get as close as you can and double click when you're done. So now seven over 124, doesn't matter what the scale says it is this is an accurate scale and so at this point I can zoom and go do a takeoff pretty quickly and easily, all right? So I would simply come over to the takeoff using STACK I'm going to say this is... You know, New Shingle roof, and I'm going to click new takeoff this case now these are all your measurement tools inside the software and once you set one of these up, you can save it and using it over and over again on different jobs but in this case I've got a pitched area.

**Phil Ogilby:**

So I'm going to measure sort of the flat area from this image but then I'm going to have it adjusted based on the slope. From here, I can give it a fill color, and a line color whatever I want my line to be, and I'm going to say start takeoff. Now, because I picked a pitched area, the software wants to know the rise and the run, so I believe this was about a six fall pitch, so we'll run with six, 12 for now. And then I simply take my mouse and go from one point to the next sort of on top of the image here, right? And you just kind of work your way around and I'm measuring this. Now, I know a lot of folks you're probably using those services, you know where you can go over to the outsource thing and folks in India will measure your ariel photograph or whatever for you but I think when you see how quick and easily this can be done and of course, you're not paying \$40 for this, right? It's pretty fast and pretty easy to do.

**Phil Ogilby:**

So you just kind of work your way around and I won't go into too much detail here, but we'll finish this up and then I'll show you how quickly we get there with this so, there we go. And this our old office and so I can tell you it's roughly about... Should be about 11,000 square feet. There you go the flat area, you can see it's 10,985 square feet and then the pitched area is 12,200 so it's about 123 squares on there, 122 and a half 123 squares. And again we did all that from Google Earth Pro. All right sorry about that, I thought I silenced my phone. All right now let's go back there, I want to show you another project that's got some more stuff on it, so that's just one thing and then we'll get into the report and stuff when we get it back into this tether job. Again with STACK you don't need to save anything, you'll notice there's no save buttons, as you do it, it's saved we send the data back to the server and that's what makes all your data so highly secure.

**Phil Ogilby:**

Now, here's a job where I uploaded some blueprints, and I also uploaded that same roof plan down here, okay? And so I've already done a takeoff here, with some shingles and I attached an assembly to it, which you'll see in a minute. So, it's one thing to go get the items measured, right get your roof area measured and your hills and valleys and stuff like that would be very easily taken off here

in just a matter of minutes but in this case what we want to do, I'm going to add some stuff to it. So let's go get this roof, let's go the flat roof, and we're going to add some more stuff to it. So I'm going to go to takeoff and here's what I want to do, let's zoom in on this, I've already set the scale, and we're going to go do a TPO, mechanically attached TPO.

**Phil Ogilby:**

And I've already attached the assemblies here and we'll do a simple takeoff for this, so I'm going to say start to takeoff and in this case I've already answered the question for the assembly, and I'll show you how that works in just a minute. But let's put a label group on here, I'm going to call this roof number, and I want to know whether it's roof number one or number two so, I will say one and will say two. All right, so in this case I'm going to measure on roof number one, and I just take my mouse, and I go up here and I go from one point to the next. Now, I can zoom in if I want, you make that bigger I think this roof goes back underneath this overhang a little bit, right? So let's work our way around here and we'll work up here and I think it goes something like that.

**Phil Ogilby:**

Double click and that's done, now let me go do roof number two and then we'll see in a minute why this is a [inaudible 00:30:34] because a lot of time you want to be able to break this out, right? Contractor might want to know, or your customer might want to know how is roof number one, how much is roof number two so this is a great way to accomplish that. And again get to the end double click, now if I had made a mistake or something I can just hit the backspace key, and it will kind of do an undo process there but there you can see I've taken off area one and area two. Let's go look at our reports, so I click reports up here in the top, and the first thing I can look at is the takeoff quantity report so this will give me very simply what I've measured for those two and then I might want to group it roof number, so there's roof number one, there's roof number two, and you can see at 32 and 24 squares respectively on those two roof areas.

**Phil Ogilby:**

So pretty cool, the fact that I've attached an assembly, let me go back before I show you the results of an assembly, let me show you how that's actually done. So we're going back to our takeoff again, we'll go to the... Let's do this kind of metal roof and I haven't done the assembly on that yet. So I created a little takeoff template here called metal roof, standing seam metal roof, and I'm going to attach what we call assemblies to it. So with STACK, we've got prebuilt assemblies already in the software you can use right out of the gate and then you find over time you probably want to end up adding and modifying, you know, adding your own, customizing and things like that, but I'll show you how powerful this is.

**Phil Ogilby:**

So let's say we want to takeoff this metal roof, I'm going to hit the add button this is our STACK catalog of assemblies, so I'm going to go into roofing we'll drill down on that, and I'm going to go do... Should have some standing seam metal there it is, we'll grab that one, and I'm going to do standing seam and here you can see all the details ridge, trim or whatever. I'm going to grab a standing seam pitched area for the roof we'll grab that and let's see what else we might want,

that's enough for now, so I'm just going to add the one assembly. So click add one assembly. Now, to sort this when you attach an assembly to your takeoff, to add assembly to your takeoff, and the software actually wants to know some additional data in order to answer your... You know give you all the answers you need and give you your quantities.

**Phil Ogilby:**

So in this case it wants to know you panel width is it 12 inches, or 16 or 24, okay? I'm going to say it's a 16 inch panel. Your clip vertical spacing in inches, so let's say the clips are 30 inches apart on these panels, and I'm going to figure a 10 percent waste and then I'm going to pick my roof panels down here. So I'm going to say these are you know, I already said they're 16 inch panels, so we'll say they're 26 gauge and then I've got maybe 30 pound Felt as an underlayment, I'm going to put ice and water shield at the eaves, I'm going to fasten the ice and water shield with three eighth inch staples and then we use a utility two inch clip to fasten the panels down and then I just hit save. Now I say start takeoff, and I'm going to state this is on roof number... Let's add another one, we'll say this is on roof number three.

**Phil Ogilby:**

Okay, so I'm going to call this roof number three. So at this point now, it wants to know my rise and run, and I've already looked at this and this has got a four, 12 slope on it so I'm going to plug in four and 12 and then I simply take my mouse and go from one point to the next just like you saw me do, by the way, the shift key will snap my line straight and snap me to 45 and 90 that can save you some time too. But when you get this process that stands between you and new revenue, this estimating and takeoff process, when you can automate it to this point you're going to grow your business much more quickly than you're growing it today and much more successfully as well. So let's go. Now you see I've taken that off very quickly, obviously, I would need to go do the gutter detail and so on and the rake and the [inaudible 00:34:26] if there was any, got some rake here.

**Phil Ogilby:**

Let's go look at reports now, and you should see we've got quite a bit of details, so I'm going to do my item cost by takeoff report that's one way to look at the data. So there you can see at a glance there's everything I took off from my shingles, did that roof, there's my standing seam metal roof. I did a TPO flat area as well, right if you remember. So there's all the quantities I need for that, so again you can customize any of this all the formulas that calculate everything and customize. Let's say I don't want to see it by takeoff I want to see it by type, so I want to see my material in one group, I want to see my labor in another, and you can see all of that with viewing this way and then let's say I want to group it though, I want to group it by roof number.

**Phil Ogilby:**

So now I can see my... Some of that I did without putting it on roof, but you can see here, so roof number three, roof number one, roof number two and then labor broken now one, two, three. Really powerful stuff, so we get you this far, now there's obviously more I could show you as it relates to STACK and using it but again it will run on any MAC or PC. You can view your drawings with a viewing mode for tablets and phones and stuff like that, so you can take this

into the field on your phone, you could put notes and comments on here as well. So if I go back in here and let's look at this and let's say I want to zoom in here and I want to put a note on here.

**Phil Ogilby:**

And so I maybe I want to actually put a dimension line from here to here and I want my guy in the field to know that's 51 feet and so I go back in here and I say... you don't want to cloud this, maybe right here is a little detail, and I want to put a text box on here. And I'm going to say whatever, let's say set up the crane here and load this roof first, you know, maybe that's my little note. And in this case what I want to do is I'm going to edit that and just make it a little bit smaller there, so I can shrink that down, there we go, and you can put it wherever you want. And then I can hit a button and send this to a PDF in email to somebody, or again your folks in the field if they have a login they can login as well and have access to it, put comments on it and all that kind of stuff.

**Phil Ogilby:**

All right, let's go back to our reports and let's say we're ready to take this in and finish it up in Excel, so I've got a couple of ways to do that. Now this, I call this job the northwest community center you can see it up here at the very top. So let's say I've got my own Excel template, right? Let's say you're one of those folks, you've got your own Excel spreadsheet, what you want to do is load your STACK report sync. You hit the button inside of Excel to load that up, right? And it opens this little window, takes a second and now it's reading all my projects that are online. So I want this Northwest community center, so I click on that, now you can see that I've got all of these reports available to me. So here's this particular report and for example I might want to, you know grab all this data and stick it into Excel and maybe I want to put it right there.

**Phil Ogilby:**

And I just grab it and it all comes in and as I said before it's all synced up, so you might have your... This is obviously my quantity field and this is my cost per unit and this is my total and so on, right? So you can come in here and then let's say the cost for these seam plates by the pail is different. So it's not 114 it's 122, and you see the formulas are already in here and it's already done, okay? And again I can go back in and grab the rest of my report, or I could put individual data in individual cells. So let's say I just want that particular piece of data in that particular cell, you just select it, whatever cell it's selected in the spreadsheet, and it links it in there so that's going to remember that anytime I come back in here, I just hit sync, and it will sync it up and refresh it with the latest data that's up in the Cloud.

**Phil Ogilby:**

Okay, so you would use this tool right here, the STACK report sync, again it's free for STACK user, and it would be a part of your Excel spreadsheet. The other option you've got here is what we call our project cost calculator, so let's say you don't have an Excel spreadsheet, but you want to get quickly to a finished estimate. So you open up your project cost calculator that we provide, you're going to say import and says okay, and now I'm going to go grab... I didn't save it, so let me go back here. So from here I want to run a report, let's say my item cost by type report, right? And I'm going to save this particular report, so I'm going to say export to Excel now let's save that particular report. So I go back

into my project cost calculator, and I say import CSV because that's the type of file we're importing, there's my little report that I just took out of the cloud, and I say open.

**Phil Ogilby:**

And of course, the software opens up in now, we've got it formatted. So let's say I want to round my quantities up, I just hit the round button, and it's goes to and rounds everything up and then I come through here and I could say well, we always figure that bounding adhesive, I'm going to figure 10 percent extra waste on that bonding adhesive and say plug in your waste factors here, you can see down at the bottom. Let's say I want to add an item for maybe travel cost, right? Travel cost, and it's going to be a labor cost and that's going to be \$650 a day for my crew, and I'm going to need five days, and it's, you know, crew day is the unit of measuring, right? And so there you go, and I'm going to need five of those and so there that's added, but I want to mark it up 10 percent, so I plug in 10 percent.

**Phil Ogilby:**

And then down below you'll see here I've got a line item for overhead, so a lot of folks don't know what overhead is. Overhead it should be a part of your estimate if it's not already, this is a factor that covers your cost of doing business, right? So up above here, I've got my labor and material and so on that's not all of your costs. So you need the cost of rent and supervision and management and software and all the stuff you use to run your office that should be in this overhead number. So let's say it's 12 percent for overhead, and you could have determined what that percentage is by taking your overall volume and dividing into it the cost that takes to run your business. So if you think about it, you've got to cover your overhead before you can actually make a profit.

**Phil Ogilby:**

So down below then let's say we want to make 15 percent profit and there's my final finish quote is \$86,000 for this particular job. This is the project cost calculator and that's it. There's a lot more I could show you Heidi but in a nutshell that's the way the software works and again you can see how it works either from taking images from Google Earth or getting drawings on new projects.

**Heidi:**

Wow thank you that's pretty impressive, and those are the kind of things that you really need, and I like how you brought in the important things that sometimes kind of get lost, but you've really... Your software and with the templates you're covering everything that you need to be profitable.

**Phil Ogilby:**

Exactly, yeah and you don't realize the impact of that like I said a lot of folks don't realize it but if you can accelerate that front end process make it more accurate, it gives you the luxury of being able to pick and choose the work you want and then you can crank up and stack up if you will all the work that you want, that's of the type that you want. It really helps you grow your business much more quickly.

**Heidi:** And also you had said before with all the testimonials that are on your site and all the contractors who have been using this very successfully, you're really hearing back from the roofing contractors that it's simple, easy to use, and it is really changing their business.

**Phil Ogilby:** Absolutely, yeah it's very exciting.

**Heidi:** That's was great so, one of the things that I think is really, really interesting is that you believe in this so much that you're willing to actually create free accounts where the customers can try one or two projects at a time to really see how it works, can you tell us a little about that?

**Phil Ogilby:** Yeah, so it's a new offering for us, so in the past, you know like all the old fashioned software companies we used to give everybody a free trial and so you could try it for seven days and hopefully you like it and we're going to try and show it to you during that time and get you with a sales rep or whatever and hopefully you buy it and if you don't well that's okay too but it was a shame because we'd have hundreds of people a month that would come in and just sign up for a demo or a trial but not get to use it. And so we just changed all that so we said you can use STACK for free and you get all of our catalogs, all the roofing catalogs, everything you've just seen is free. There's a couple catches obviously, we're in business to make money we're not a government run agency here but you can use our full software for free and you could do as many projects as you want.

**Phil Ogilby:** It's not limited to the number of projects there's a couple of limits and here's where the limits come in, so let's say, for example you come in and you do a takeoff and you do an estimate on a project today and then you do one tomorrow. That's fine you can do that, seven days from now those projects are going to gray out on your calendar so you'll need to write down all the data from it because seven days from now they'll gray out. Now, you'll still see we've got your data there we're just not going to let you back in unless you sign up for a paid account obviously, but that sort of one of the places that pay well. The other thing is you can't have more than I think two projects active at any given time so those two projects I just described went inactive so then you can do two more, seven days later.

**Phil Ogilby:** So you can continue to use it over and over again, a lot of folks are doing that, you know, it's just the way we design the system but the good news for us is we're getting tons more people using the software and then they see the benefit ultimately and they see the value in signing up. It's not very expensive and certainly when you compare it to the value that it brings to your business it's really like pennies on the dollar, so that's the way it works.

**Heidi:** Yeah I think that's great. I mean, I tell you what, I've used a lot of different softwares in my marketing business and when I have the opportunity to use it and really see how I like it that makes all the difference.

**Phil Ogilby:**

Yeah that's right and we didn't want people to get too busy and they couldn't use the trial and then we just kind of spoil our relationship with them was wasted. So, now we say you can just keep coming back as much as you want and use it as much as you want within those limits I described.

**Heidi:**

Yeah, that's good. That is excellent. You know what and that's perfect because it's leading us into a couple of questions that I've had coming across the queue on. So we're going to open it up to questions just a reminder to everybody out there, you can type in your questions either in the question box or the chat box and we will answer those. I'm going to start out with some that have already come in and one of the first questions was, how does this work in the field, can you take it out into the field?

**Phil Ogilby:**

Yes, so you can. We're working on mobile apps so today we don't have an app but it's the STACK application itself is what's called responsive. So you'll find you can open a web browser on your phone or your tablet and it's runs in a web browser. Now, if you're on a small screen we give you the mobile experience we call it, so today you can't do takeoffs on it in the field, you can only kind of view what's already been takeoff by the folks in the office or wherever but you need to have a bigger screen if you're going to do takeoffs. So that's where it works today, we do have mobile stuff that's coming though later in 2019 you'll see we've got an android and an IOS app specifically that are going to give you a lot more functionality but today you can take it out there and certainly like I said earlier the folks in the field can open it on their phone, they can see what you've taken off, and marked up, and they can see all your notes and comments and all that kind of stuff and see what you've measured.

**Heidi:**

Excellent, that's cool. A lot of new great stuff coming down the road too, that's always exciting. How about multiple users, how does that work?

**Phil Ogilby:**

Yeah, so you could have multiple users as well, we generally give you a discount on additional users, but you can do multiple users and then they can login with their own account, and you're sharing the bid calendar, you're sharing everything that you save, all the assemblies and the takeoff templates are all saved. You can share projects, you can actually work on the same project at the same time with two or three people. So it's very convenient and easy and most folks have a couple of users within their office when they sign up for STACK.

**Heidi:**

Perfect. Okay, so now the next question coming in is how long does it take to learn the software and what kind of training do you provide in helping them to learn it?

**Phil Ogilby:**

Yeah, as a rule we don't send people to your office, right? Because it's generally not need, that's the beauty of this it's in the Cloud. So we'll do a session like this with you and we can actually do as many as you want. One of the things that's interesting, you know I hear a lot of folks, older folks especially will say, you know guys my age will complain, I don't want to pay every year, I only want to



pay once. This is a subscription and one of the great things about it for you the user is that, our interest are more aligned than ever.

**Phil Ogilby:**

So we don't have a limit like if you're having a problem using it or you hire a new employee and you want them to learn to use it, we literally train them for free and they can have unlimited training sessions. So we have a team of folks that are trained to just do that, right, to sit with you and work through your account and there's no cost for that. So there's no cost for training ever with STACK.

**Heidi:**

That's excellent because you know I think that's one of the most important things, if you get frustrated just stop using it so that training is so critical. So I don't have any additional questions at this time but Phil I just want to thank you so much for the demo, for the information, for really you know caring about our industry and bringing forward technology that helps the contractors and, which overall helps the industry. So thank you very much for being with us today.

**Phil Ogilby:**

Yeah thanks for having me I appreciate it, thanks everybody, appreciate your time.

**Heidi:**

Thank you and I want to thank all of you out there for listening to this webinar, as you know this has been recorded, so you'll be able to watch it at Roofers Coffee Shop [rccs-webinar-series](#). And there are a number of great webinars out there that we've been doing this year a lot of opportunities to look at different products and services and softwares that are available in the industry. So I really encourage you to visit that site. I also invite all of you back in two weeks to hear about how the next generation is taking over the roofing business.

**Heidi:**

So don't be scared, but it's a great thing to learn because this younger generation, they use technology every single day so like today was STACK, and next week when we'll have the experts at Trimble talking about some of their mobile apps and things that are going on. They're really going to be talking about how that younger generation is bringing technology into the industry. So I think it's going to be very important for everyone to hear so that's November 14th at 11:00 A.M., and we will see you all then. Have a great day and a great Halloween. Thank you.