Leighton Healey

Well, hi, everyone. My name is Layton Healy. I'm with the team at Knowhow, and it's exciting to have you join us for what is our second installment of our zero to 60 webinar. And so today's webinar is super timely and super impactful because it's focusing on something that controls a lot of money in our businesses, which is how do we onboard Mitigation Estimators? Right. These are the individuals that have to come in and capture every tiny detail and that rolls up ultimately into a waterfall of whether or not we make money or not in these jobs. Paul, this is an important webinar.

Paul Silliman

It's a very important webinar because not only is you're coming out to someone's house after possibly their worst day of their life, their house is flooded. This is something terrible. But at the same time, you guys have to make money. You have to make sure you're billing for the work that you're doing, but also following those TPA guidelines, following adjusters guidelines, getting that information across. But also, you got to make money. This isn't FEMA. This isn't a for profit business.

Leighton Healey

Absolutely. And what's more is and again, we won't get into it, but you think about the ever evolving nature of exactimate pricing and stability pricing. You think about things changing constantly from each SLA, from all the different carriers. At the end of the day, this isn't just like a learn it once and you're good role. This is a role where you have to be a committed learner. Am I right?

Paul Silliman

Absolutely. It's always changing. There's always new techniques, there's new certifications, there's new ways of drying. You have to stay on the forefront of that. And you also have to be able to tell a story. You have to be able to explain, this is what we did to restore this house. This is how we mitigated damages, and have to communicate that to someone who's never been on site and is looking.

Leighton Healey

At photos or defend or sometimes you can defend an estimate, right? Correct. Give us some numbers here. So a fully trained estimator on a monthly basis in a busy firm, how many estimates? They crank it out a month?

Paul Silliman

I know at one point in time, I think I was writing at least ten to 15 estimates a week. Depending on the time where you are in the country, you could be extremely busy. So this is something that you definitely want to have that consistency as well.

Leighton Healey

Yeah. So writing 60 estimates a month, Mitigation estimator, and then 90 days later, when the project finally comes for billing, there's an issue or someone's questioning your pricing. So again, an estimator that doesn't have a good onboarding, a good training, doesn't have those fundamental skills, is really going to cost the business a lot of money. Even if you think they're catching on initially, you may not actually see the damage of a poorly organized Mitigation Estimator onboarding until, say, 90 days. Later. Am I right? Absolutely.

Paul Silliman

And also, it's being able to stand up on your own 2ft when someone says, oh, well, why'd you do this? Here's our certifications. Here's the reason why we did this. This is why we're the industry experts and be able to stand behind your estimate as well.

Leighton Healey

Absolutely. Well, let's kick things off here right now. Paul, you be at my AV here. Are we seeing our presentation? Does it come up?

Paul Silliman

We are seeing you.

Leighton Healey

Awesome. So, again, if you're just tuning in here, welcome to the second installment of Zero to 60. Our focus today is on Mitigation estimators, and specifically how to rapidly onboard Mitigation Estimators in the restoration industry. Very important, very impactful. And so let's kick things off. So if you think about kind of the goodie bag that we want you to leave with today, we want you to leave with, number one, to understand what are some of the obstacles to accelerating Mitigation Estimator onboarding. You need to understand what the roadblocks are so that you know how to be able to plan your onboarding, to be able to avoid some of those common pitfalls. Also, we want everyone to learn some keys to accelerating Mitigation Estimator onboarding. So there's some best practices that you should be doing. We're a very research heavy software company here at Knowhow. We bring in a lot of industry expertise, and we get the pleasure of working alongside numerous restoration companies who are really leading the way on streamlining worker onboarding.

👤 *Leighton Healey*

So we want to make sure you understand that. And then we want you to see for yourself how leading companies are supercharging their Mitigation Estimator onboarding process. And we're thrilled that we get to be part of that, but we're thrilled to show you exactly we're going to basically lift the hood, so to speak, and show you behind the scenes. Okay. If you're like me, there's a lot of webinars going on around me, and sometimes I tune in and I wonder, is this going to be the right webinar for me? Should I try to jump to that meeting? So let me make it easy for you. You're in the right webinar if this is your situation. Number one, if you're in a role where you have bonuses or profit share that's tied to the profitability of the business or profitability of specific projects. So if that's you, meaning you have some skin in the game of a project or the business doesn't make as much money, then you're in the right place.

👤 *Leighton Healey*

Similarly, if you are stuck doing the estimates yourself, if you can't problem solve effective estimator onboarding. Right? So if that's you're like, that's me. And then finally, if you have experienced the true cost of a poorly trained estimator. So, Paul, hit that home for us. What are some very tangible costs of a poorly trained Mitigation estimator?

👤 *Paul Silliman*

Yeah, if you get an estimator who's just trying to get out there for speed trying to get an estimate uploaded that skipping steps? Or do you have photos? Are you covering everything you guys did and giving that detailed explanation? Are they following that checklist that every estimator is using? If not, you could be missing $500 to $1,500 on an estimate. Next thing you know, you add that up a couple of weeks down the line, it really hurts the bottom line at the end of the day to where if you're not staying consistent and missing items, it's going to hurt your business.

Leighton Healey

Absolutely. And what would be like a mid size restoration firm average. Our data showed that average restoration firm in North America did about $2.1 million of revenue last year. And so 2.1. How many projects is that? Paul, what do you think? Give or take?

Paul Silliman

That's actually a good one.

Leighton Healey

Do you ever take four or 500 projects? Probably. So when you talk about those, like, $500 paper cuts on a poor estimate, you compound that over all your projects. I'll tell you, it's pretty significant. So let's talk a little bit about who's hosting this thing. And so it's my pleasure. I get to co host with my colleague Paul. Paul, introduce yourself to the audience today.

Paul Silliman

Yeah. My name is Paul Silman. I've worked in the restoration industry at numerous different stages over the past ten years. This is something I am personally excited about because I started in this industry as a restoration technician and was very fortunate to have an owner move me into an estimator position, which was great, other than the fact that I kind of had to learn a lot of these bumps the hard way. So figuring out I was really good at ripping up a house, but getting it back together and billing for it was a different challenge. So I'm extremely excited to go through this with you guys today.

Leighton Healey

Awesome. Yeah. Well, we're going to draw on that lived experience because you've been on both sides of the conversation. Here my background in a nutshell, my passion has always been, how do you really get maximum horsepower out of labor workforces? You know, I've had the privilege of founding and leading multiple companies that lead workforces in labor services that range from 25 staff to 5000 staff. And so there's multilocation single location, multiple crew, commercial. I've had the opportunity to lead those types of teams and really developed a knack over the years of, how do you create a high performance team where we bring people up to speed rapidly and then to be able to dispatch them across multiple locations and to be able to deliver a consistent experience, hard work, tons of mistakes, tons of expensive mistakes. And having personally done hundreds of estimates and trained estimators, I can tell you that few things are more important than getting your estimator onboarding.

Leighton Healey

Right. So we're going to build this whole webinar around a case study called Alex. And so I want you to meet Alex. Alex, he's a new estimator and he's going to get trained up. And so let's talk about Alex. Well, alex 24. He's been in restoration for nine months and really great attitude, positive guy and he's come from Ohio. So he's got a great attitude. And what's more is that at this moment he's a Mitigation Tech and he's consistently over delivered for us. Paul been a great guy for us, right? But he wants to grow. And no question one of the main reasons why Mitigation Techs quit, one of the reasons is because they feel like they hit a glass ceiling. We don't want to lose Alex. Alex is solid. So we're saying, hey Alex, what would you think about getting trained up to be a Mitigation estimator?

👤 *Leighton Healey*

And so Alex is keen and he said I'm in. Now, a couple of things about Alex. He's got a knack for numbers bonus, right? But on top of that, he already has this relationship with knowledge where when he needs information, he's, like the rest of us, jumps on YouTube. How do I change the filter on my car? And so that's Alex. So as we go through this, we're going to refer back to Alex. So keep Alex in mind. Let's look at some data. So if you're new to know how, let me tell you a little bit about us. Not only is knowhow the leading workforce software for onboarding and training and supporting and facilitating all the how to that your business runs on, but we also are the leader in workforce research in your industry. And so last year's restoration industry, state of the Industry report hundreds of restoration companies participating in a robust survey.

👤 *Leighton Healey*

So let me give you some insight. So across the industry, one of the number one roles that restores are hiring for this year are estimators. So what that means is that not only are you competing for estimators, but you're competing with companies who know they need estimators and they're going to be investing in this role. Also, when you ask, we ask across all 50 states and all Canadian provinces, we ask how long does it take you to get an estimator from day one to up to speed delivering? The average is eight weeks or more. So what that means is that today is March 6. What that means is Alex is going to take until basically he's going to be mid May before we really feel that we can take the training wheels off. That's a long time. Especially if you think, wow, I may not hire that person until April.

👤 *Leighton Healey*

It's like, hey, storm season is coming, right? Like, you better have these estimators in place. And if you don't have a plan to get them up to speed, well, your competitors might. And so no question, the most popular tool in estimating is exactimate. It's very robust system. It's complicated, right? But here you can see that people are using a variety of means of getting their estimates done. And then finally, when you say, well, where exactly are we experiencing the most challenge with technology? Because Estimating is largely a tech enabled process in the business nowadays. So number one is when people are trying to get their staff to use technology, getting adoption across the whole team is a challenge. And then also being able to train up their staff to use tools properly is a huge challenge. So all the more reason to be able to bake out a very robust onboarding program.

👤 *Leighton Healey*

And then, no question if you were to say, where are my competitors investing money this year? By a landslide, the number one source of investment in the restoration industry this year within Workforce specifically, is going to be in staff training. So if you came to this webinar and you're thinking like, I don't really have any really, I would say, structured approach to how we're going to be training, I just wanted to tune in to see whether or not there was some quick tips or tricks. Let me just kind of sound the alarm for you right now. To be competitive as an employer in restoration, you should be making employee training, employee guidance, one of your top investments this year. Because, and I've said this before and I say it again and Paul, you're stuck hearing me say this all the time. This is an industry that's not opportunity restrained, it's Workforce restrained.

Leighton Healey

And so let's dig in a little deeper. If you haven't seen one of the studies that we put out last year, whyworkers quit? Whyworkersquit.com? It's a free resource, it's an awesome audiobook, and it's the largest study ever done on the restoration workforce. And when we asked staff what could have been improved in your onboarding experience when you joined that restoration firm, what they said, number one is it would have been great to have more skill based training. Skill based training. And it would have been great if the whole training was more structured. Right? And so we're talking all roles, field roles, admin roles, management roles. Everyone said I wanted structure, and I want it to be more skill based. And so, Paul, give us a preview. We got something coming down the pike for this. Okay, so let's talk a little bit about what are some of the key challenges to get a new Mitigation Estimator up to speed.

Leighton Healey

So maybe you're participating today and you're saying, you know what, this is like. I've been bringing Estimators on for years, and some people might say, hey, I'm finally going to pass the baton to my first Estimator. So let's talk about some of the obstacles. So, Paul, when we say that one of the obstacles is that this new Estimator is drinking from a fire hose, we're familiar with that term. Just give us a couple of bullet points here. From your experience, what was it like just getting hit with that fire hose. As a new Estimator, it's a big.

Paul Silliman

Change because especially a lot of times, you see Estimators that come from the field. They're a great worker, they're a technician. They want that career growth. They want to work for your company. And the next step is to move into Estimating. Well, Estimating is you're going from a hands on, more construction based, you're ripping out drywall, you're setting equipment to now you are scoping losses. You are physically using exactimate. You're actually using more of the technology in the field. So it's a complete shift from more of a physical labor to more of a mental. And you have to be on point to where now it's capturing data, making sure you have your labor set, your timesheet set. Do we have all our photos? Are we telling that story compared to more I'm here day one to save the day. We're going to get the water out of this house.

Paul Silliman

So it is a little bit of a mindset switch in finding that information to help you make that switch is a big key.

Leighton Healey

And on the other part, fragmented training. So fragmented trading, when I think about fragmented trading, when I was training Estimators over years and years was if I didn't give myself enough time, because sometimes it can take a while to do a proper estimate, especially if it's a big loss. Right. Not to mention if you're doing a lot of photo documentation, you're bringing in scanners who knows whether you're using something like Matterport or docusetch. At the end of the day, there's a lot of work going on. And so for me as a manager, shoulder to shoulder for that entire process, again, that's difficult. And so it's easy to get stuck in a rut where you fragment that training. So what is that like? Paul, what was your experience going through training and did you experience any fragmentation?

Paul Silliman

Well, my training was a little different, and some people on this call will probably laugh at this one. When I went into Estimating, my owner gave me a textbook from the 1980s on how to build a house and said, Here you go, you're now an Estimator. Doesn't apply to any of the technology, doesn't apply to any of the drying techniques. This is how you put framing on a house. That was the traditional way of doing it back then. It is not the speed way of doing it, for sure. And that book, I looked at it for two days, got thrown in the back of a truck, and I think it was the last time I ever saw it again. But yeah, just being able to piece together that same training you have on the Mitigation side, how do you get that going on the Estimating side as well?

Leighton Healey

Yeah, no question to your point that you said Estimating has kind of changed now. So when you talk to an average restore and you talk to their Estimators it's such a landscape, right? You have some restoration companies that we work with is completely matterport driven. They got a room of Estimators with computer screens, and you feel like you're going into one of these military drone outfits. There's so much technology. And then you got some restores who are using this third party who's going in and doing their estimates. And you got over here, you got more of a traditional person who's kind of the owner still finding themselves doing the big estimates. But it's a total mix. And what we hear is that especially at the speed that things are evolving at New Estimators, will often say, how does it all fit together? Like, okay, so when do I call the adjuster?

Leighton Healey

When do I refer to the codes? When do I use Ask Amy. When do I matterport? And so it's like, how does this whole complicated walls, how does it fit together? And so people are tripping over their feet. But another thing is the pressure of deadlines. So, Paul, for those who haven't been on the Estimator side, or maybe it's been a while since they were a New Estimator, how does the pressure of these deadlines just impact an Estimator's envelope?

Paul Silliman

It goes back to the drinking from the fire hose. You take time. I'm going to build this estimate. I want to make sure I capture everything. But if it's through a certain program or through a TPA or for certain carriers, you have 24 hours to have it uploaded. And if you add in the fact that normally on a perfect sunny day, you have one loss to go to, you get the right assessment, you have a great conversation with a homeowner. Realistically, you have probably three to four. You got to go scope. You have two losses from the day before. You just got a big commercial loss coming in, and you got to get these out because it's an always moving target. So the pressure of, oh, man, I forgot that water loss from the other day. We're past the timelines now. We're getting dinged on this program because we didn't upload fast enough.

Paul Silliman

It can be very overwhelming very quick.

Leighton Healey

And the good news is you still got your full hour for lunch and 215 minutes coffees, right?

👤 *Paul Silliman*

Yeah, on a good day.

👤 *Leighton Healey*

I'm just joking. So you're stressed out. You're poorly supported. You're malnutrition. And so at the end of the day, you're running an adrenaline, and you're not remembering all these codes. It's overwhelming. And, you know, especially when I was training Estimators, I'd say, hey, did you get that estimate done? They're like, well, I didn't want to submit it because I knew I was forgetting some things, and I didn't want to get bald out. I didn't want to get in trouble with the boss. And so I figured I'd just wait till you came by. And I was like, you know what? Anyways, okay, so let's talk about now some people on this call will say, well, the answer is hire an experienced estimator. Solved. Right. And actually, this is your water technician, but hire an experienced estimator. And so, Paul, let's just talk briefly about that. Give us from your experience if a person is hiring an experienced estimator, someone who on the resume says, I'm an experienced mitigation estimator, what are some of the pros and what are some of the cons that sometimes we don't think about?

👤 *Paul Silliman*

Well, some of the pros might be experience with, like, exactimate they might have an idea of the codes it's going to cut, that learning down of how do I physically use the program? What do we use now? One thing, especially on the water mitigation side, is how do you have your estimator work? Some companies have an estimator actually meet the homeowner first. They actually go out and scope the job before they do it. If it's a program work to where you receive the assignment, this might be writing estimates off photos, off scope sheet. You may not actually go out to the site. You may have a matterport or something of that nature to where you're physically writing off a screen, or you may be going out and scoping after the fact. So if you have someone who has that experience, that's fantastic. It'll cut that learning curve down.

Paul Silliman

But also, what was their experience? Do they physically know how to go to a home, talk to a homeowner in scope, or were they writing this off of photos?

Leighton Healey

Yeah, I wonder for a lot of people that are tuning in and hey, in the chat conversation, I wonder what the general consensus is. Like, do you prefer to start with a nice level ground zero, like brand new to estimating and be able to build into that person the skills that they need to be a great estimator? Or do you prefer to have a bit of a foundation, albeit maybe a bit of a rocky or a fractured foundation of things you need to reverse? I wonder what the consensus is from the group on which they would prefer. I mean, Paul, from your perspective, which would you prefer?

Paul Silliman

It could go either way. If you have a sound training form to get that new hire without experience up to speed, I'd probably go with the one without any experience. You can grow them in, teach them your way of estimating. But that being said, what's the experience that your other estimator has? What did their last company do? It's really a coin flip.

Leighton Healey

Yeah. No, well said. I think so too. So let's get really specific here before we actually look at how restores are onboarding these mitigation estimators rapidly. And let's just get granular. So when we spend time with companies who seem to be just knocking out of the park on their mid estimator onboarding, here are some things that we're seeing. One is that they have a simple way of monitoring progress real time. What do you mean by that is that they're establishing standards of how they want things done. And then when you're sending that estimator out on a job site is they have the ability while I'm in the office to be able to see if he or she is following the process as they're going through that estimate properly. And I'm able to flag if they're skipping steps or they're missing steps, whether it's the photos, whether it's the conversations with the customer, whether it's the due diligence on the codes and exactimate, they have an ability to monitor that.

Leighton Healey

They're also creating a playbook for all the how to in their company. And so, again, when you're bringing an experienced Estimator in and this is really important, and they're saying, well, that's not how I've been doing it. If your way of doing it is just based on your memory, based on your experiences, that's not as solid as saying, well, welcome to our company. We have a way that we do things around here. It's our documented processes or documented how to. And so it's really about getting you up to speed with the way that we do it. And so companies that have invested in establishing a company way, those individuals just stand a much easier way of integrating experienced tires into their business. Similarly, having a structured and standardized Mitigation estimate or onboarding process creates opportunities. I can't say who, but I had a conversation with probably one of the most innovative leaders in restoration last week.

👤 *Leighton Healey*

Paul, I think you know who I'm talking about. Had breakfast with him. I think that he's going to transform the restoration industry personally. And he made a comment that I thought just totally just blew my mind. And he said, you know what? He said the knowledge of how to do restoration and estimation, all that, it's just become commoditized. It's increasingly becoming easier and easier to access. And if companies actually grow up, they will create structured they'll use technology and they'll create structured ways of being able to train and support their staff. Because what I want his words, what I want is I want time to provide soft skill training, customer support training, conflict resolution training with my Estimators and my managers so that we can really stand out in the customer experience that we deliver. But if all the work is just trying to get the tactical work done of the estimating, again, all of those soft skill trainings go to the wayside.

👤 *Leighton Healey*

And your estimators can be kind of a bit of a blunt force, a source of just kind of blunt force going to a job. I don't know, Paul, if that resonates with you.

👤 *Paul Silliman*

Yeah, absolutely. It's very easy to get lost in the WTR codes. Are we making sure we're covering this? Are we making sure and not the we're here to restore your home. We're the experts that are coming out. You made a great selection calling XYZ Restoration to come out. We're here to get you back to pre lost conditions. Compared to someone who's got seven jobs to get you today, they're just mosying through items. They're not paying attention to exactly how that homeowner feels, what they just went through, and how we're getting that build out to your insurance carrier as well, explaining that process, taking that time instead of being just zero focused on, I got to see how many Dhus are here. I don't know how much wall they ripped out. I got to get out of this house as fast as possible.

Leighton Healey

Yeah, no question now. Well said. So one of the things that I just want to give a shout out to provide some context here, so if you've never heard of Knowhow before, but let me just kind of just put it in context. Knowhow is leading restoration software for helping workers to be able to get onboarded, trained up, and really just provide them with that point of need, source of guidance for their company. And what's more is that we specialize in standardizing restoration companies, their operations in as little as 24 hours. So really a transformational solution. But I think what's more than that is that the volume of companies that are adopting Know How are recognizing that workers today are different. Right? Workers today are different. Is that they don't memorize things like they used to. They don't hold on to things. I mean, I don't know the last time I memorized a phone number, Paul.

Leighton Healey

Because we rely on technology in a sense kind of, in a sense, supplement our knowledge base. And so that's a big part of what we do at know how when it comes to just like the brass tax of it is that what seems like just a normal day where my day is always segmented with phone calls from my staff that estimator on a job site and say, hey. And if you have any questions, call me. Well, we don't actually do the math. The reality is every time they call me and there's 1520 minutes of my time, 1520 minutes of their time, we just add up the cost. These are very expensive phone calls where if I could just empower that worker to be able to solve problems by themselves. At the end of the day, it's profitability and productivity that's pushed forward instead of like a vehicle.

Leighton Healey

Always I think of those what do you call those vehicles, Paul, where every time you come to a stoplight, they shut off to try to save gas. You know what I'm saying? At the end of the day, you can just picture a company that every time a worker hits a crossroads and they don't have access to the company's how to it's just like the engine shuts off, productivity stops, and they're just like, waiting idle until the boss gets a hold of them. You tell me, Paul. I don't know. Talking. Nonsense, but I mean, that's a real thing.

Paul Silliman

Sounds like an afford to me. No, it's the truth. Think about how many times you get going in a day and you get stopped and started. If it's something simple, I'm not sure how to use a vertex tool and exactimate for you to stop what you're doing. Go speak with that estimator, show them in the system, go through what they're doing, get back to what you're doing. That 35 to 40 minutes is time. That's now gone. You're now delayed. Now you're getting home later. Now you're getting stressed out more. Now I don't know if they're going to be able to keep up. Did I make the right decision here? Now I'm spending more time hand in hand with someone. Instead of people search things on YouTube, they search on Google, give them those tools to find that info.

Leighton Healey

Absolutely. That's a big part of why we built Know how is because lived experience fielding those calls and saying, hey, not only do I want my time back as the manager, owner, project manager, supervisor, but at the end of the day, I don't want my worker to feel like an idiot for, like, 25% of their day. As you're like, why is this so difficult to just get questions answered? So know how. One of the things that's unique about Know How, if you're a restorer or you're just in the general construction industry, is that we've worked with the top minds in the industry, and we've standardized the entire industry. Like, we actually have pre built templated, process and workflows that our clients just grab them, use them, brand them to their company, modify them to however they want to the nuance of their business, and then boom, this lurking idea that it takes ages to create a process manual.

Leighton Healey

Right. That's so old school. And Know How is the new approach so tangibly talking? What we're talking about is giving every single one of your team members instant access to the way our company does everything from the way you get onboarding to get training up. If you want to get leveled up into different departments, one of your workers comes up to you and says, hey, what would it take to be a project manager? Well, it depends. Let me think. Last time I onboard, I think I got like, a slide deck no in the same hub. They look okay. That's the path to become a project manager. Okay, I'd love to go after that. All the equipment, all the software. And Knowhow translates this content into any language. So there's a reason why Knowhow is really considered a transformational tool, but that doesn't matter if we can't see it for ourself.

Leighton Healey

Paul so everyone remember Alex 24 year old Mitigation technician knocked it out of the park, put his hand up and says, hey, I want to grow. Want to take on more. Paul you are responding to Alex's request, and we're going to get this guy trained up to be an Estimator. And so take us through what Alex's seamless onboarding is going to look like as a Mitigation Estimator, show us what this pre built estimators checklist this kind of best practice resource is, and then take us through. If you were Alex's supervisor and you've got 100 things on the go, but you want to keep an eye on Alex's progress, take us through that. I'm going to hand it over to you because I'm super excited for this.

Paul Silliman

Absolutely. So we're going to kind of show a little bit of insights. We're going to peel behind the curtain a little bit. We're going to show you exactly what we're doing to get Alex up to date, and we're going to start kind of on the management side. I'm going to show you how we're creating this. That way when we dive in here, you'll see exactly what we're doing and be able to show how we're going to be able to get them up to date. Bear with me one moment.

Leighton Healey

While you're bringing that up again. What we're talking about here is rather than every time we start a new Mitigation Estimator, and me just carving out space and trying to remember all the odds and ends we're talking about is very easily creating a standardized way of how you onboard every Estimator so they have the same consistent experience in your business. So take it away, Paul.

👤 *Paul Silliman*

Absolutely. So what we're going to do here is this is one we created for Alex. Alex has come to us and said, you know, I really want to progress in our career, so let's dive in here and make sure we have everything Alex needs to get up to date. So this is a presaved workflow we have for Estimators taking a look in here. We're going to give them some soft skills as well as we're going to make sure they still know how to use their respirators. They know how to use PPE, they understand the class and category of water damage. I know he has some experience, but I want to make sure that's really driven home, especially on the estimating side. We use Encircle here at XYZ Restoration or Five Star Gold Restoration as our demo hub here. So I really want to have some of that in circle work in there as well to make sure he knows how to document all of these different items.

👤 *Paul Silliman*

Now, if you use a different software, we have different abilities of having that in there. But for today's example, we use Encircle as well. Exactimate. So we're also going to have some information in here on how to do a quality assurance call, how to speak with that homeowner, how to make sure things are going the way we want, as well as diving in. Here on how to actually hand off from an estimator to a project manager when they do sign some different items, as well as how to use exactimate. This is going to be one of the biggest features for Alex is coming from the field side of it. How do you turn on and off labor minimums for people on this call that are experienced, say, oh, well, it's really easy, you just click a couple of buttons. Well, Alex doesn't know that. How do we make sure he has that step by step guide to get that info?

Paul Silliman

So we have a variety of different exactimate processes in here that he can use to definitely drive on, as well as driving down the bottom here. We do also have a couple of checklists, some best practice items, and then also we have a simple test for him how to actually go through and scope a loss. Mind you, everything you're seeing right here is part of Knowhow's public library. And frankly, when we dive through some of these examples, if you think, hey, I could probably make that better, maybe we should change a couple of things with Know how you have that ability. Frankly, I want to hear your thoughts on it. Send me your comments, hop on our website, shoot me an email. I want to hear how we could best make this better or what your thoughts as well. So from here, this is something we have put together.

Paul Silliman

I think this is a good, solid plan for Alex to get going. So what I'm going to do is I'm actually going to pause this screen and dive into the mobile app so we can see what Alex sees actually on his phone out in the field.

Leighton Healey

So you're assigning that to Alex and so Alex is going to pull up his phone. And so while you're bringing it up, Paul, and you're just doing a swap. Man, I'll tell you, every time I look at these onboarding workflows, I'm always reminded of three things. One is I'm always amazed at how frankly kind of arrogant I can being like, oh, yeah, I can onboard this person. Yeah. Estimating. And then I see them like, man, there is so much that goes into skill training, right. And it's like, oh, yeah. It's not just how to put the numbers in. Oh yeah. There's the customer angle. There's the handoff to project managers. There's the ability to interact with our job cost accounting team. And then you layer on the top that I as the owner, am not well rested. I probably had too much coffee. I'm probably a little bit too stressed out.

👤 *Leighton Healey*

My mind's in like 15 different projects. Take it away, Paul. So what's Alex looking at here?

👤 *Paul Silliman*

Absolutely. And you hit some very important things on the head right there is you have to take a step back sometimes, especially as a leader, as a manager in your company, and say, okay, this is someone who does not have that skill set. This is a new estimate. They've never used exactimate before. They don't know the wealth of experience you have. So how do we get that into their hands? One thing you see here with Know how this is on our mobile application now is it's very much like how workers like to find information. It's very much like, you know, a YouTube and Instagram, they have the ability to actually search for that information they're looking for. So before we jump in, let's just say he has a question on exactomate. He can actually jump in here and search for that and find, okay, I'm really struggling on these exactimate quick codes.

👤 *Paul Silliman*

I can't find for the life of me what those dehumidifier codes are. Well, now this is a process we have to where he can simply jump in and search. Okay, here they are, those dehumidifiers. Okay, perfect. I've been looking for these for a while. I just solved this issue. I did not make that phone call. I did not send that email. Now I can get this estimate uploaded and sent out to where I'm not getting yelled at today because I'm two estimates behind giving that simple step by step instruction.

👤 *Leighton Healey*

Yeah, totally. And you made a point earlier, Paul, that if someone's looking at this, they say, that's great, Paul. You obviously had time to write these. No, Paul, what you're showing is, correct me if I'm wrong, but that's an example of just, like, a free template that's in know how that just you get out of the box.

👤 *Paul Silliman*

Absolutely. And with know how, one thing I'd love to point out, this is completely customizable. If you're looking at this saying, well, I don't want to just give them all the codes. I want them to learn it, okay, then let's make it that way. Or I want every single estimator I have to be able to pull up exactly the line items I want them to use and the notes to use. You have that ability as well. We can completely customize this to however you want your teams to learn whether that's stock text, videos, anything of that nature, we can do that as well. So diving in here, this is what Alex can pull this up and say, man, tuesday, March 14. On my first day, I'm going to learn how to get onboarded. I'm going to learn how to resolve those client complaints. We're going to learn how to actually use respirators.

Paul Silliman

Okay, this is one I want to dive into today. We're going to learn what the different actually, we're going to go categories. I want to learn what the different categories of a water loss are. Well, I'm experienced technician. I know what these are. Well, are you 100% positive of this one? Because as everyone on this knows, a cat one loss and a cat two loss is very drastically different when it comes to billing, so okay, well, I think this is a cat three loss. Well, did it discharge from beyond the trap of a toilet, is there floodwaters involved? If there's floodwaters involved, is there coverage? How do you find that information and really drive that home, but also giving that point of need information for someone out in the field? As much as we'd love to say everyone can remember all this information, how do you make sure someone's out in the field who has a homeowner, who is just absolutely distraught, all of a sudden drop a nugget on you, saying, oh, yeah, my house flooded just the other day, and it's continuously coming in the house?

Paul Silliman

Well, that's actually pretty important because what caused that loss? Where did it come from? Are we going to have coverage issues? Not to mention that's outside contaminant water coming inside, that just changed our entire scope. Being able to have that point of need information is definitely a big key when it comes to estimating and getting that information across for a new estimator as well.

Leighton Healey

So one of the questions that comes up often, Paul, is where does this content come from that we're looking at right now when Knowhow says it provides templated content. So let me just speak to that really briefly before you move forward. So one of the things that is just a huge reality in not only restoration, but really in any kind of labor service industry is that the individuals who spent 30 years, 40 years, 25 years acquiring a lifetime of skills in this industry, well, the most common trend that we're seeing is that they're retiring. They're, they're transitioning out of the industry. And very few of them, I haven't met any yet that wrote memoirs or wrote a textbook on their learning. And so for a large part, they're just transitioning out of the industry. They still want to have an impact, they still want to have a legacy, they still want to be able to give their knowledge.

Leighton Healey

But let's talk about the new worker, Alex, coming into the industry. Alex doesn't want to read a memoir. He doesn't want to sit in a 90 minutes webinar course like this. At the end of the day, he wants to get her on his phone, he wants to get it fast. So our content actually we bridge that gap is that we have a huge industry author program where for many of the top seasoned veterans in this industry, know how is kind of like their side hustle, meaning they actually contribute to our free template library for our clients. We have decades and decades of experience of individuals who are coming in and creating this content. That's where the content comes from. It's from road tested individuals who've been there, done that, and want to have an impact. And rather than just training two estimators, they want to be able to work with Know how to actually impact an entire industry and equip the new incoming workforce with the way to do this complicated industry.

👤 *Leighton Healey*

So anyways, Paul, you keep going. I just wanted to make sure we talked about that.

👤 *Paul Silliman*

Absolutely. And having ICRC certified professionals is a big deal. Having someone who actually is road tested, someone who's done this before. Back in the mid 90s, we would float carpets. We'd spray a little bleach on mold and call it even. That's not how it is anymore. We have different air testing, quality testing. It's not rocket science, but there is a specific song and dance that has to go into restoration, and it's something that a lot of people are struggling to find. One example I want to jump into is kind of some best practice estimating items we have here. This is one we have that we can jump in and start where you can say, as a new hire, are we taking photos of the loss? Do we know how much equipment do we have? Do we know, hey, did we take a photo of the loss area?

👤 *Paul Silliman*

Do we have containment up? Are we going to bill for the containment? How do we document what happened? Because as a former adjuster, 99% of the people that are looking at this, they'll never be on site. They are looking off photos. Do we have the ability to paint a picture and tell a story to someone who, frankly, has probably never been in one of these job sites before, but needs to understand exactly what happened? So having this step by step checklist to move through, do we have an initial scope sheet? This is an example of just a standard, exactimate scope sheet. Each company out here probably has a different one they use if it's through Encircle, if it's through their own that they've created. These are just examples that you can have of went sideways on me. Examples of different kind of scope sheets you can use.

Paul Silliman

When I started, it was paper. It was literally a scrap piece of paper. You wrote down what you ripped up, where it went and how to go. But that's not how we work anymore. So you have that ability of having exactly what you need filled out. And when. Right here on the app, are you asking the correct questions from a homeowner? What was the source of water? Has it been repaired? How long was this way? Is there a chance of any kind of growth? Is there any additional information I need to know? When was the home built? Have you been tested for asbestos and lead? Is this additional order? Do we need testing? Do we need to call a hygienist? Being able to have this information to help paint the best story possible?

Leighton Healey

One of the things, Paul, as you're going through that we hear from people using know how is the customer even to someone who's maybe a moderately experienced estimator or moderately experienced mitigation estimator, I should say, they show up on site and they have significantly more knowledge than the homeowner. But for a homeowner, again, this estimator is showing up and maybe they're a little bit late or maybe they lack a little bit of a professional polish. Let's call it again. One of the most popular things we hear is that when the customer asks a question, the worker will actually pull out know how on their phone and say, well, let me show you the company's estimating standard processes and let me show you specific examples of the reason why this is a category two loss. You can see here. And immediately in a chaotic experience, it restores confidence in that homeowner that they say, this is a very professional organization.

👤 *Leighton Healey*

This isn't just someone like you said, kind of scribbling on the back of a pad of paper or on the back of kind of a project blank piece on the back. So I take my notes there. This is a worker who clearly is following a standard. This is a work who clearly has a resource to kind of a single source of truth. Anyways. Keep going. Here, Paul. So what else is Alex going through?

👤 *Paul Silliman*

Absolutely. So not only can Alex use this checklist to help drive, these are the steps I need to take. Am I diagramming this area? Are we using matterport? This is something that can be edited and massaged to exactly how your company uses it, whether it's matterport, whether it's an actual tape measure, digital tape measure, whatever they need to actually scope these areas. But we're giving that step by step playlist to where they know exactly this is how these jobs need to be done. Are you using Mika? Are you using PSA? Any kind of different softwares? Where are we drawing that information that needs to be part of that playbook that you're sending over? Or your story of this is how wet this room was when we first started. Now this is the work that we've been done. How do we get this across? Having these set processes is how we can definitely speed everything up in the sense of do you have your final packet together?

👤 *Paul Silliman*

How are we send this over? Do you have your W two to send over to your insurance carrier? Do you have your scope of work? Do you have a diagram showing your scope of work? Having these set standards that you know everyone's going to get sent over and then simply, how do you create that sketch in the room? Are you going to have all that information? How do I physically do this in the software? So not only can this be someone who's an experienced rep that they can look at this be like, yes, okay, I know what I'm doing here, we're going to move on. Or if it is Alex on his first day saying, I really need to take a look at this on how I'm actually going to build this room, how do I paint that picture? And then also we set up this is one I set up on here.

👤 *Paul Silliman*

As well to where? What are those dehumidifier line items? How do we get this into our workers hands to speed up that process? You say, oh well, they can search for this items. I can tell you as someone who went into estimating, you can spend an awful lot of time searching for those WTR line items and never find the ones you want. So how do I get this directly into someone's hands? Are you drying with a furnace? Are you actually going through a specialty drying codes using square footage? Is a cat three? Is there a bid item that's needed giving all this information at the touch of someone's hands? To allow no more phone calls, to allow them to actually find this information, instead of pulling someone out of a meeting to say, oh, man, I really don't know what I need to use for our monitoring fees?

Paul Silliman

I'm not really sure. Do we charge to clean the equipment afterwards? Absolutely. Here's some of those line items we use. Eliminating that time spent searching, trying to find Googling, which I don't know if anyone's Googled. A lot of these line items, they're not easy to find. There isn't really a resource out there for them. So how do you make sure you give that to those new estimators so that we removed 2ft of drywall on here. Okay, well here's those drywall line items we need you to use and you can help build that way. And that consistency of not only do you have these items and the time is not spent searching, now you can have your estimators that are going to submit the same estimates say this is a state farm or USAA claim saying, hey, we're having a lot of success. Our estimates are going through.

Paul Silliman

We're getting a lot of really good feedback. Well, let's build out that custom playbook to where when you have that USAA loss, you can say, hey, our WTR line items are going over well, let's use this for all this or these line items are using well for this one, create that playbook so everyone can see it and it's publicly shared.

Leighton Healey

Yeah. So Paul again. Now I'm thinking about Alex. So let's go back to Alex's onboarding. And so again, right out of the gates, we're assuming Alex, maybe he's new to the company. And so jumping back into that there's new employee onboarding and so we can shift this around. But if I'm the owner and I'm busy running 100 things at once and I'm trying to keep an eye on Alex's onboarding and Alex is working through some things. How do I kind of again monitor Alex's onboarding over again takes multiple weeks. So how do I keep an eye on that while I'm busy running the rest of the business? Because I'm going to see Alex periodically throughout the day, throughout the week and I want to be able to check in with him and be able to know, kind of what he's struggling with, what he's completed, what's not completed.

Leighton Healey

Take me through that.

Paul Silliman

Absolutely. And if you take a look at here, this big zero in a circle up here in the top right corner, this is where with our new higher onboarding workflows, you can actually monitor how far somebody actually is in the process. So right now I've started 0% of this one here. So let's just say I'm going to jump in and I'm going to do some PPE processes. We're going to go ahead and start this check. This is completed that process, and we're going to go ahead and dive right back in here. So this way you should be able to jump into Knowhow and you'll be able to see that. Now, not only am I in here still shows zero, WiFi is not working too good today, but you can actually come in here and actually see how far along someone actually is working. So what I'm going to do now is actually jump out here to the actual desktop software, which is what more of a manager will see to where we can actually really dive in and see more of those actual step by.

Leighton Healey

Step processes there as you're pulling it up. Paul, to me, what really stands out to me is that in my experience onboarding multiple people at the same time, I'm onboarding a new office administrator. I'm onboarding a mitigation estimator. I've got a new Mitigation technician who's coming up behind that person I promoted to an Estimator. Again, those are different onboarding paths all going on at the same time. And so at the end of the day, it's hard to keep kind of aligned to sight on all those moving parts. So walk us through that. Absolutely.

Paul Silliman

So from a management side, this is where Know how brings a lot of horsepower, especially in our Insights tab. This is where you can actually see what has been completed and when. This is the one we actually just did on the PPE to where you can see on March 7 at 150 p. M. This process was completed and actually gives you the ability to download these as PDFs. So if this is something that is compliant standards, you can save these. And then also you have the ability of actually seeing what was completed and when. This is one that we'll dive into in a second. But it's also how do you test somebody? How do you make sure they're actually going out and getting this information? One of the ones that we created was just a scoping test. How do you go out and make sure this test was actually scoped properly?

Paul Silliman

I'm going to go ahead and show you this report here. Say, okay, I'm going to show you the other side of this as well in a moment. But from a manager, I can say, okay, I gave Alex this test to go out and scope this loss did they get the loss information? Did we get it? Well, I can see here that he did upload the actual sketch, but I don't have any notes. I'm not sure what happened. I don't have any loss information. I don't know what exactly happened on this. So as a manager, I can say, okay, well, he sketched this item well, but I don't have any of the other information. I'm not painting that picture. I can't submit this estimate because it's going to get kicked back from any carriers. So this is where, as a manager, now I need to sit down and say, okay, Alex, I saw that you scoped this really well, but what are we missing?

Paul Silliman

What happened here? Is there additional training? Are you unsure? Oh, I got really swamped. Well, I scoped it real quick while I was there. Well, if we can't document what we're doing, we can't bill for what we're doing. This allows you to have that conversation and drive home. What are we doing right? What are we doing wrong? Is there some steps that we're missing? Is Alex not able to comprehend what we're doing and why? And how do we get that information for him? Diving into that one?

Leighton Healey

Yeah, that's huge. And so in the short amount of time we've got left here, paul, show us this one last kind of feature that you have in Alex's onboarding. And then I want to make sure that we leave everyone with some resources today.

Paul Silliman

Absolutely. So this is one we created. This is just simply how to scope a loss. This isn't anything crazy. This is how you physically go out, measure this loss. How do we know what happened? This is where, hey, we need you to go out and get photos of the damage. We need a floor layout and measurements, and we need some scope notes. Pretty simple. We're not throwing you to the wolves. This isn't go out and do a $1.5 million commercial loss tomorrow. This is how do we build those building blocks to help you become a successful estimator for us with know how, this is where he can simply come through, complete these different processes, and then also what are the photos? You have the ability of adding photos and notes here with know how. This is where in a training aspect, alex, I want you to go out to this loss, or even if when I was trained, it was in the back room in the warehouse or here's our financial officer's office.

Paul Silliman

You're going to scope this one today, but give them the confidence to go out, get those photos, be able to say, hey, what was damaged, what was removed, depending on how your business does it. Are you going off a scope sheet? Are you actually giving an estimate prior to Mitigation? However your business works, let them go out and get that information. And then also we need you to scope the room. I need. To know the square footage of the floor, we need to know the height of the ceiling, we need to know everything that's going on with this loss so we can create that estimate and then also the ability to give a recap. Did you get all the photos you needed? Are we able to create that estimate off of what you've gone out and done? And then simply what did you do well were you able to measure those countertops?

Paul Silliman

Were you able to actually get that info you needed? What do you feel you can improve on? Because one thing we've noticed, especially in our books is that healthy communication and the ability to find those answers is what a lot of people are looking for nowadays, giving them the why so that they can share that and actually connect the learning to the doing.

Leighton Healey

It's crazy to think Paul, that for the vast majority of businesses the expectation is you're just going to keep this all in your head. It's hard to believe and you just think about how much capacity you could unlock if you again just give your team the resources to be able to solve problems by themselves to confirm their knowledge independently. Yeah, it's a game changer. Let me bring us to kind of ahead here as we land the ship here and I'll share my screen in a moment and let me pull up just this last kind of presentation. Right now, if you're like most individuals who participate in our zero to 60 series, you're probably wondering, hey, you know what? Are you going to be able to make this recording and the slides available to individuals who weren't able to attend? Or I could show this to my team, and the answer is yes, we're going to make that available.

Leighton Healey

But more importantly, if you're sitting there and you're saying, hey, I've got some estimators that I'm thinking about starting, or I've got someone on my team and she's just a really fantastic technician, and I want to be able to level her up, but I just haven't had the time on the corner of my desk to be able to kind of map out an Estimator training program. Well, the good news is that everything is already built and it's ready to rock. And Knowhow really has a turnkey solution for you. But what we would encourage you to do is to learn more about how you can take staff from day one to productivity faster than ever before in the industry. And I would encourage you to go to zero to productive.com. You can scan this QR or you can just go to zero to productive.com and to be able to see for yourself how in an environment that's branded to your company your colors right?

Leighton Healey

You can take there's been some questions in the chat around. Hey, well, why do they do step this and why do they do step that? And is it important you do this? Remember, like Paul was saying, this is just a template, this is a starting point and the ability to kind of come into an environment where you can grab an expert estimator's onboarding path about how they would onboard an estimator. And then we'll say, well, you know what, that step is not relevant in the state that I'm part of these things are more important. So to rearrange things, to tweak them, to add different images, to drop in a recording that you had giving a portion of an estimate one time, and you've just been wondering, where do I put that video? To lace it all together in your own environment and to do that and actually have an estimating roadmap 24 hours from now.

👤 *Leighton Healey*

Right. Today? It's Tuesday. Right? It's Tuesday. Just think before lunch tomorrow. To be able to actually have all of this at your staff's fingertips, it's not crazy. That's the reality of restoration nowadays. So Paul. You know what? We covered a lot of ground thinking about Alex, thinking about a lot of people who've got a lot of Alexes in their business. What are your kind of closing thoughts? What's your advice for individuals who want to improve estimator onboarding in their business and just want to know where to get started? What's your kind of closing advice to them?

👤 *Paul Silliman*

Probably my closing advice is just giving the ability to give a platform and give that how to information. A lot of times it's not that someone doesn't want to learn or is struggling, it's just exactimate is not the easiest thing to pick up. Or people are really good at ripping up a house or very good at talking to homeowners, but maybe struggle on the technical side. So eliminate some of that stress and anxiety or those barriers by giving that step by step guidance and playbook and help them excel. Nobody wants to do bad at their job. They just need the information to succeed.

👤 *Leighton Healey*

Well said. Well, my invitation to everyone participating is don't let this just kind of drop off your desk. Check out Zero toproductive.com. If you haven't checked out any of our resources, we make all of our studies, all of our research, all of our books available free. So head on over to zeroproductive.com, head over Travis knowhow.com, and we hope that we can help you again accelerate your mitigation estimator onboarding faster than ever before. So thanks everyone. Thanks for joining us. I hope you have a great productive day and all the best as you look to find ways to give your business the edge. And we recommend that you start with your estimators. Have a great day.