

FORA

FAMILY OWNED ROOFERS OF AMERICA

Contractor Diagnostic Scorecard

A comprehensive assessment of your roofing company's operational health, infrastructure maturity, and growth readiness — across every department that matters.

Company Name:	_____
Owner / Contact:	_____
Date of Assessment:	_____
Assessed By:	_____
Annual Revenue (approx):	_____
Years in Business:	_____

How This Works

Part 1 — Pre-Visit Self-Assessment: You fill this out before our visit. Basic company info, current tools, and a quick self-evaluation. Takes about 15 minutes.

Part 2 — On-Site Diagnostic: Our consultant completes this during the visit. Every department scored 1–5, mapped to Green / Yellow / Red. You walk away with a clear picture of where you stand and where to start.

Score	Tier	What It Means
5	GREEN	Fully systematized. Running on protocol, not personality.

4	GREEN	Strong foundation. Minor refinements needed.
3	YELLOW	Functional but inconsistent. Dependent on key individuals.
2	YELLOW	Significant gaps. Reactive, not proactive.
1	RED	Missing or broken. Immediate attention required.

Part 1: Pre-Visit Self-Assessment

Complete this section before our visit. Be honest — this isn't a test, it's a starting point. The more accurate you are here, the more useful our on-site time will be.

A. Company Profile

Company legal name

DBA / trade name (if different)

Owner name(s) & role(s)

Year founded

Number of full-time employees

Number of subcontractor crews used regularly

Primary service area (counties / cities)

Approximate annual revenue (last 12 months)

Revenue breakdown — Restoration vs. Retail vs. Repairs (estimate %)

Current certifications held (GAF, CertainTeed, Owens Corning, other)

B. Current Tools & Systems

Check or write in what you currently use. Leave blank if you don't have one.

Category	Tool / Software / Method	Satisfaction (1-5)
CRM (Jobber, ServiceTitan, AccuLynx, etc.)		
Accounting / Bookkeeping software		

Estimating / Xactimate		
Project management / scheduling		
Marketing platform / agency		
Lead generation source(s)		
Review management / reputation		
Payroll provider		
Communication (team chat, email, phone system)		
Document / file storage		

C. Honest Self-Assessment

Rate your company 1–5 in each area. 1 = nonexistent or broken, 5 = fully systematized and running well. Don't overthink it — first instinct is usually right.

Department / Area	What We're Really Asking	Score (1–5)
Sales process & consistency	Do leads get followed up? Is there a defined sales process?	
Production quality & organization	Are jobs planned, scheduled, and executed consistently?	
Financial visibility	Can you see your real margins, AR, and cash position at any time?	
Marketing & lead generation	Is your pipeline consistent or feast-or-famine?	
Hiring & team development	Do you have a system for finding, training, and keeping good people?	
Customer experience	Does every homeowner get a consistent, professional experience?	
Repair division	Is repairs a real department or just 'stuff that comes in'?	
Warranty handling	Is warranty a system or a fire drill?	
Subcontractor management	Are subs vetted, managed, and held accountable?	
Owner's time & delegation	Are you running the business or is the business running you?	

D. In Your Own Words

What is the single biggest bottleneck in your business right now?

If you could fix one department overnight, which would it be and why?

What does your company look like in 5 years if everything goes right?

Have you been approached by private equity, a franchise, or an aggregator? If so, how did that go?

What made you interested in FORA?

Part 2: On-Site Diagnostic

Completed by FORA consultant during the on-site visit. Score each line item 1–5. Department totals auto-map to Green / Yellow / Red tier. Use the Notes column for observations, red flags, and quick wins.

Sales

Max: 35 | GREEN: 26–35 | YELLOW: 16–25 | RED: Below 16

Item	What to Look For	Score (1–5)	Notes
Defined sales process (steps, scripts, expectations)	Is there a documented sales flow or does each rep wing it?		
CRM usage & lead tracking	Are all leads in a CRM with status updates, or living in phones/notebooks?		
Speed to lead & follow-up cadence	How fast do they contact new leads? Is there a follow-up sequence?		
Pricing consistency & margin protection	Standardized pricing matrix or every estimate is a guess?		
Pipeline management & reporting	Can they tell you close rate, avg ticket, and source performance?		
Training & onboarding for new reps	Is there a training process or 'ride along for a week and figure it out'?		
Commission structure & transparency	Documented comp plan or verbal agreements and disputes?		
DEPARTMENT TOTAL		/ 35	TIER: G / Y / R

Production

Max: 40 | GREEN: 30–40 | YELLOW: 18–29 | RED: Below 18

Item	What to Look For	Score (1–5)	Notes
Pre-job planning & checklists	Does every job get a game plan before crews mobilize?		
Scheduling system & calendar management	Centralized calendar or jobs scheduled by text/memory?		
Project manager protocol & accountability	PMs have defined duties or just 'check on the job'?		
Material ordering flow & verification	Orders checked against scope? Deliveries verified?		
Quality control & punch list process	Defined QC standards or 'looks good from the ground'?		
Client communication during production	Homeowner updated at each stage or left wondering?		

Job costing & margin tracking	Actual costs tracked per job or just total monthly revenue?		
Safety & liability training	OSHA compliance, fall protection, property protection documented?		
DEPARTMENT TOTAL		/ 40	TIER: G / Y / R

Finance

Max: 35 | GREEN: 26–35 | YELLOW: 16–25 | RED: Below 16

Item	What to Look For	Score (1–5)	Notes
Real-time bookkeeping (not 'catch up' monthly)	Books current within a week or months behind?		
Job costing visibility	Can they pull P&L; by job, by division, at any time?		
Accounts receivable management	AR aging reviewed weekly? Collection process defined?		
Billing & change order protocol	Written change orders? Defined billing milestones?		
Payroll process & compliance	Clean payroll system or manual calculations and disputes?		
Cash reserve & contingency planning	Operating reserve policy or living check to check?		
Insurance claim & supplement management	Supplement process defined or leaving money on the table?		
DEPARTMENT TOTAL		/ 35	TIER: G / Y / R

Repair Division

Max: 30 | GREEN: 22–30 | YELLOW: 14–21 | RED: Below 14

Item	What to Look For	Score (1–5)	Notes
Repairs treated as a standalone profit center	Separate scheduling, pricing, P&L; — or afterthought?		
Standardized repair pricing matrix	Defined pricing by repair type or 'whatever feels right'?		
Scheduling & dispatch protocol	Dedicated repair schedule with SLAs or 'when we can get to it'?		
Repair tech training & quality standards	Defined training path or 'been doing it a while'?		
Shingle matching & documentation protocol	Systematic ID process or eyeballing it on the roof?		

Emergency tarp response system	Defined response times and pricing or ad hoc?		
DEPARTMENT TOTAL		/ 30	TIER: G / Y / R

Warranty

Max: 25 | GREEN: 19–25 | YELLOW: 11–18 | RED: Below 11

Item	What to Look For	Score (1–5)	Notes
Warranty intake & triage protocol	Defined workflow from claim to resolution?		
Turnaround time SLAs	Inspections scheduled within a set window or whenever?		
Root cause tracking & feedback loop	Patterns identified and fed back to production/training?		
Client communication through resolution	Homeowner updated at every step?		
Cost tracking & reporting	Warranty costs tracked as their own line item?		
DEPARTMENT TOTAL		/ 25	TIER: G / Y / R

Client Services

Max: 30 | GREEN: 22–30 | YELLOW: 14–21 | RED: Below 14

Item	What to Look For	Score (1–5)	Notes
Lead intake & qualification process	Leads screened before scheduling or everyone gets an appt?		
Inbound call handling & routing	Defined routing protocol or whoever answers the phone?		
CRM note-taking discipline	Every interaction logged or 'I think I talked to them'?		
Outbound follow-up system	Scheduled outbound cadence or 'when we have time'?		
Client onboarding after sale	Welcome sequence or radio silence until production starts?		
Reporting to ownership	Weekly lead/close/revenue reports or gut feel?		
DEPARTMENT TOTAL		/ 30	TIER: G / Y / R

Marketing

Max: 30 | GREEN: 22–30 | YELLOW: 14–21 | RED: Below 14

Item	What to Look For	Score (1-5)	Notes
Google Business Profile & local SEO	GBP active, reviews responded to, rankings tracked?		
Website quality & conversion optimization	Professional site with CTAs or brochure from 2015?		
Social media presence & consistency	Regular posting cadence or sporadic/nonexistent?		
Lead source tracking & attribution	They know which channels produce and at what cost?		
Reputation management & review generation	Systematic review requests or hoping for the best?		
Marketing budget & ROI tracking	Defined budget with measured returns or 'we spend some'?		
DEPARTMENT TOTAL		/ 30	TIER: G / Y / R

HR & Team

Max: 30 | GREEN: 22-30 | YELLOW: 14-21 | RED: Below 14

Item	What to Look For	Score (1-5)	Notes
Hiring process (post, screen, interview, onboard)	Defined hiring flow or 'know a guy'?		
Employee handbook & policies	Written policies or verbal expectations?		
Onboarding for new hires	Structured first week or 'shadow someone'?		
Performance management & reviews	Regular check-ins or only when there's a problem?		
Culture & retention efforts	Intentional culture building or high turnover?		
Compliance (W-2/1099, workers comp, OSHA)	Buttoned up or hoping nobody asks?		
DEPARTMENT TOTAL		/ 30	TIER: G / Y / R

Subcontractor Management

Max: 20 | GREEN: 15-20 | YELLOW: 9-14 | RED: Below 9

Item	What to Look For	Score (1-5)	Notes
Vetted sub list with current documentation	COIs, W-9s current and on file?		

Sub performance tracking & ratings	Quality, reliability, callback rate measured?		
Pricing negotiations & agreements	Negotiated rates or whatever they quote?		
Probationary process for new subs	Trial period with oversight or thrown in the deep end?		
DEPARTMENT TOTAL		/ 20	TIER: G / Y / R

Ownership & Leadership

Max: 30 | GREEN: 22-30 | YELLOW: 14-21 | RED: Below 14

Item	What to Look For	Score (1-5)	Notes
Org chart — defined and communicated	Everyone knows who they report to?		
KPI tracking across departments	Dashboards/reports or flying blind?		
Delegation & empowerment of managers	Owner has freed themselves from daily ops or is the bottleneck?		
Strategic planning (1/3/5 year vision)	Written plan or 'just trying to get through the year'?		
Time management & role clarity	Owner's time structured or consumed by fires?		
Compensation philosophy & documentation	Pay structures documented and transparent?		
DEPARTMENT TOTAL		/ 30	TIER: G / Y / R

Diagnostic Summary

Transfer each department's total score and tier here for an at-a-glance view of the company's operational health.

Department	Score	Max	Tier	Priority Action
Sales		35	G / Y / R	
Production		40	G / Y / R	
Finance		35	G / Y / R	
Repair Division		30	G / Y / R	
Warranty		25	G / Y / R	
Client Services		30	G / Y / R	
Marketing		30	G / Y / R	
HR & Team		30	G / Y / R	
Subcontractor Management		20	G / Y / R	
Ownership & Leadership		30	G / Y / R	
OVERALL		305		

Recommended Module Installation Order

Based on the diagnostic results, prioritize modules in this order. Circle or number the departments below based on where this contractor should start.

Priority	Department / Module	Rationale
1		
2		
3		
4		

Follow-up visit scheduled for:

Contractor Signature

Date

FORA Consultant

Date
