

MERCANTILE

AI Playbook for

Roofing Companies.

You didn't build a roofing company to spend your days on paperwork.
AI takes that off your plate.

1 in 3

Adjuster estimates miss
required line items

\$4,200

Average per-job revenue gap
on insurance work

44 days

Average wait for
final claim payment

Start here.

Three things to try right now.

No software to install. Just open Claude and try one of these today.

1

Proposal in 10 minutes.

60 seconds

Go to claude.ai. Type: "I'm a roofing contractor. A homeowner called about storm damage on a 2,400 sq ft home. Write a professional proposal I can send in 10 minutes with scope, timeline, and a clear next step."

2

Calculate your revenue gap.

90 seconds

Go to claude.ai. Type: "I do 40 insurance jobs a year. Average job is \$18K. I supplement half and recover \$1,500 each. What am I leaving on the table if I supplemented 90% of jobs and recovered \$3,500 each? Show the math."

3

Draft a supplement dispute.

2 minutes

Go to claude.ai. Paste an adjuster estimate that came in low. Type: "Draft a professional supplement request disputing these line items. Include code references, material costs, and a clear scope justification."

Now imagine this running on every job in your pipeline.
That's where Mercantile comes in.

A typical Monday.

Before and after.

BEFORE AI

7:30 AM

Adjuster estimate came in \$4K low. You know it is wrong but building the supplement takes hours you do not have before the crew arrives.

9:00 AM

Homeowner calls asking for an update. You are on a ladder. You tell them you will call back. You do not call back. They leave a 3-star review.

11:00 AM

Inspector wants documentation of decking damage before approving the supplement. You have photos in your camera roll and no organized report.

1:00 PM

New storm lead comes in. You spend 30 minutes writing a proposal from scratch. Half the time the homeowner already signed with someone else.

3:00 PM

Supplement follow-up with the carrier is overdue. You have three open jobs waiting on approval. Each week of delay costs you cash flow.

5:30 PM

End of day. You have 6 jobs in progress, 4 open supplements, and no idea which ones are urgent. You will figure it out tomorrow. Or the day after.

AFTER AI

7:30 AM

AI drafts a line-item supplement with code references and material costs before 8 AM. Dispute is in the adjuster's inbox at first light.

9:00 AM

AI sends a professional job update with photos, timeline, and next steps. Homeowner feels informed. You stay on the roof.

11:00 AM

AI builds a damage documentation report from your photos with condition notes, measurements, and code citations. Inspector has what they need.

1:00 PM

AI generates a professional proposal from address, damage description, and scope in under 5 minutes. You send it before the competitor finishes theirs.

3:00 PM

AI drafts a follow-up for each open supplement, references the original submission, and requests a decision date. Adjusters move faster when pushed.

5:30 PM

AI produces a one-page job status summary with open supplements ranked by value and age. You know exactly where money is stuck.

You're losing 30+ hours a week to admin that should never land on your desk.

1

Supplement Writing

Line items missed in adjuster estimates go unchallenged when building the case takes hours you do not have. AI drafts full supplements with code refs and cost breakdowns.

10 hrs/wk >> 2 hrs/wk

\$28K/yr recovered

2

Adjuster Follow-Up

Supplements stall when no one is pushing. Adjusters move faster with consistent, professional follow-up. AI drafts every touchpoint so nothing falls through the cracks.

6 hrs/wk >> 1 hr/wk

\$16K/yr saved

3

Damage Documentation

Inspectors and adjusters require organized photo evidence and written scope. AI turns job site photos into formal damage reports with condition notes and measurements.

6 hrs/wk >> 1 hr/wk

\$14K/yr saved

4

Proposals & Homeowner Comms

Slow proposals lose jobs to faster competitors. Homeowners who feel ignored leave bad reviews. AI handles both, sending professional proposals and updates automatically.

5 hrs/wk >> 1 hr/wk

\$12K/yr saved

5

Job Pipeline Tracking

With multiple jobs open and supplements at different stages, nothing gets the attention it needs. AI keeps a ranked list of what is stuck, what is urgent, and what needs a push.

5 hrs/wk >> 30 min/wk

\$10K/yr saved

Your AI tools.

Built and managed for you.

Mercantile evaluates how your jobs run, recommends the right stack, and handles setup so you stay on the job site — not in the office.

Claude AI

The engine behind everything. Supplement writing, damage documentation, homeowner communication, proposals, follow-up drafts, and pipeline tracking.

AccuLynx

Roofing-specific CRM and job management. Tracks jobs from lead to close, integrates with Xactimate, and keeps your supplement pipeline organized.

n8n

Workflow automation that connects your job management software, email, and carrier communication. Triggers follow-ups and reminders automatically.

Fireflies.ai

AI notetaker for adjuster walkthroughs, homeowner consultations, and crew briefings. Transcribes and summarizes so nothing gets disputed later.

ChatGPT

A second AI option for specific tasks where it performs better. Mercantile helps you know which tool to use and when.

How Mercantile works.

Operations expertise meets AI.

Mercantile was built for contractors who do excellent work but spend too much time chasing carriers, writing documentation, and managing a job pipeline that never stops moving. Whether you run five crews or one, the gap between what the adjuster approves and what the job actually costs is where the money lives. We bring AI that fits how roofing works — on the roof, in the truck, and in front of the adjuster — so the business

1 **Discovery & Strategy**

Mercantile looks at how your jobs run today. Where supplements get missed, where proposals are slow, and where AI plugs in without adding work.

2 **Build & Implement**

Mercantile handles setup, templates, and rollout. Your crew does not learn new software. You just start capturing more of what you already earned.

3 **Stay Current & Scale**

AI moves fast. Mercantile keeps your operation on the tools and workflows that give you an edge, so you are always ahead of the next crew bidding.

MERCANTILE

Ready to see what your business is leaving on the table?

This is a lot to take on alone. That's where Mercantile comes in.
Book a call and I'll look at how your operation actually runs,
show you where AI fits, and what it's worth to fix.

<https://workwithmerc.as.me>

tap to book your call

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