



**"Modernizing the Field: Bridging the Gap Between
Documentation, Technology & Training in Property Restoration"**

with Paul Silliman

The State of the Industry

Pain Points:

- Disconnected teams: office vs. field friction
- Incomplete or delayed documentation = delayed payments
- Mindset of “that’s how we’ve always done it”
- Misunderstanding the insurance payment process
- Tech fatigue: Too many tools, not enough buy-in

Field Documentation: The Hidden Profit Killer

Issues:

- Inconsistent documentation standards
- Technicians don't know why documentation matters
- Managers assume documentation is happening - but it's not

Solutions:

- Standardized field documentation
- “Why we get paid” — basic Xactimate/pay process awareness for techs
- Real-world impact: great documentation = faster approval & money in the door

Adopting Technology That Actually Sticks

Problems:

- Too much software, not enough usage
- Training is rushed or top-down only
- Teams in the field feel like tech slows them down

Solutions:

- Select tools that integrate with current workflows
- Include field techs in pilot testing
- “Train like you deploy” — hands-on, scenario-based tech training

A New Way to Train Teams

Old Way:

- Sit-down classroom training
- One-and-done approach
- No follow-up or accountability

New Way:

- On-the-job, role-specific micro-training
- Peer-led learning: leverage your rockstars to teach
- Reinforcement loops: job audits, weekly “wins and gaps” meetings
- Tech-assisted trainings: demonstrate with videos, screen captures, and mobile checklists

Connecting the Dots: The New Blueprint

- Create a Field-First Culture: Give your team the *why*, not just the *what*
- Combine:
 - Clear documentation standards
 - Smart use of tech
 - A continuous training rhythm

THANK YOU!

“Change doesn’t need to be hard — but it must be intentional.”



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