Playbook summary

Residential to Commercial Roofing Transition

The playbook explains how a residential roofing business can prepare for commercial work through coordinated legal, technical, safety, financial and administrative controls. Residential success alone does not establish commercial readiness; the company must qualify for the exact project, system and contracting role.

Five independent permission layers

Authority to contract	Correct entity, state and local business credentials, and signing authority.
Authority for the exact scope	Required classification, permits, code compliance and licensed subtrades.
Owner / GC eligibility	Buyer prequalification, insurance, bonds, safety, experience and capacity.
Manufacturer / warranty eligibility	Company and system authorization plus project-specific warranty steps.
Individual / team credentials	Qualified personnel, task-specific training and competent-person resources.

National coverage with project-level verification

The reference covers all 50 states and the District of Columbia. Pair it with a Local AHJ Profile for the exact address, scope, contracting role and project value. The remaining chapters address manufacturer pathways, systems and quality, safety, insurance, finance, estimating, contracts, public work and market access.

An evidence-based transition

Twelve operational gates and a recommended 180-day plan guide the move from supervised, manageable work toward separately qualified direct, manufacturer-warranted, bonded or public projects. Advancement depends on verified capability and performance, not elapsed time. The appendices and companion workbook organize the readiness checklist, local profile, credential wallet and supporting records.

A maintained CRN platform and a recorded decision

Section 18 proposes navigators, evidence and renewal tracking, readiness assessments and human-reviewed opportunity and bid support. A qualified reviewer must separately approve bid, contract and mobilization stages. Progress scores and private CRN status do not confer governmental or manufacturer authority. Later-stage conditions must close before they become due.

Playbook outline and decision framework

Reference areas used together; chapter order is not an approval sequence.

SECTIONS 1-4 / pp. 4-9

Readiness framework

Five permission layers | Readiness levels | Twelve operational gates

SECTIONS 5-8 / pp. 10-85

Authority and eligibility

Legal entity, licensing and permits
50-state + D.C. reference and local checks
Federal and multi-state requirements
Manufacturer and warranty pathways

SECTIONS 9-15 / pp. 86-95

Delivery and risk controls

Technical systems, design and quality
Safety, insurance, finance and bonding
Estimating, contracts and administration
Public and institutional procurement

SECTIONS 16-18 / pp. 96-99

Implementation and platform

Sales and buyer prequalification
Recommended 180-day transition plan
Proposed CRN product architecture
Maintained records and human review

APPENDICES A-E / pp. 100-132

Support all areas with current evidence

A. Readiness checklist | B. Local AHJ Profile | C. Credential wallet | D. Glossary | E. Official sources

FINAL GO/NO-GO STANDARD / p. 133

Qualified human review: Bid / Contract / Mobilization

Separate approval at each stage. Record the evidence, reviewer, decision date and recheck date.

GO

Requirements due for the stated stage are verified. Approval covers that stage only.

CONDITIONAL GO

Current requirements are verified. Assign later-stage conditions and close them before due.

NO-GO

Stop the proposed action if a requirement due now is missing or unverified. Escalate for review.

Source: Playbook v1.3 (September 21, 2026). Source-check dates vary; confirm current requirements before project reliance.

Companion revised September 21, 2026. Page references point to the revised 133-page playbook.