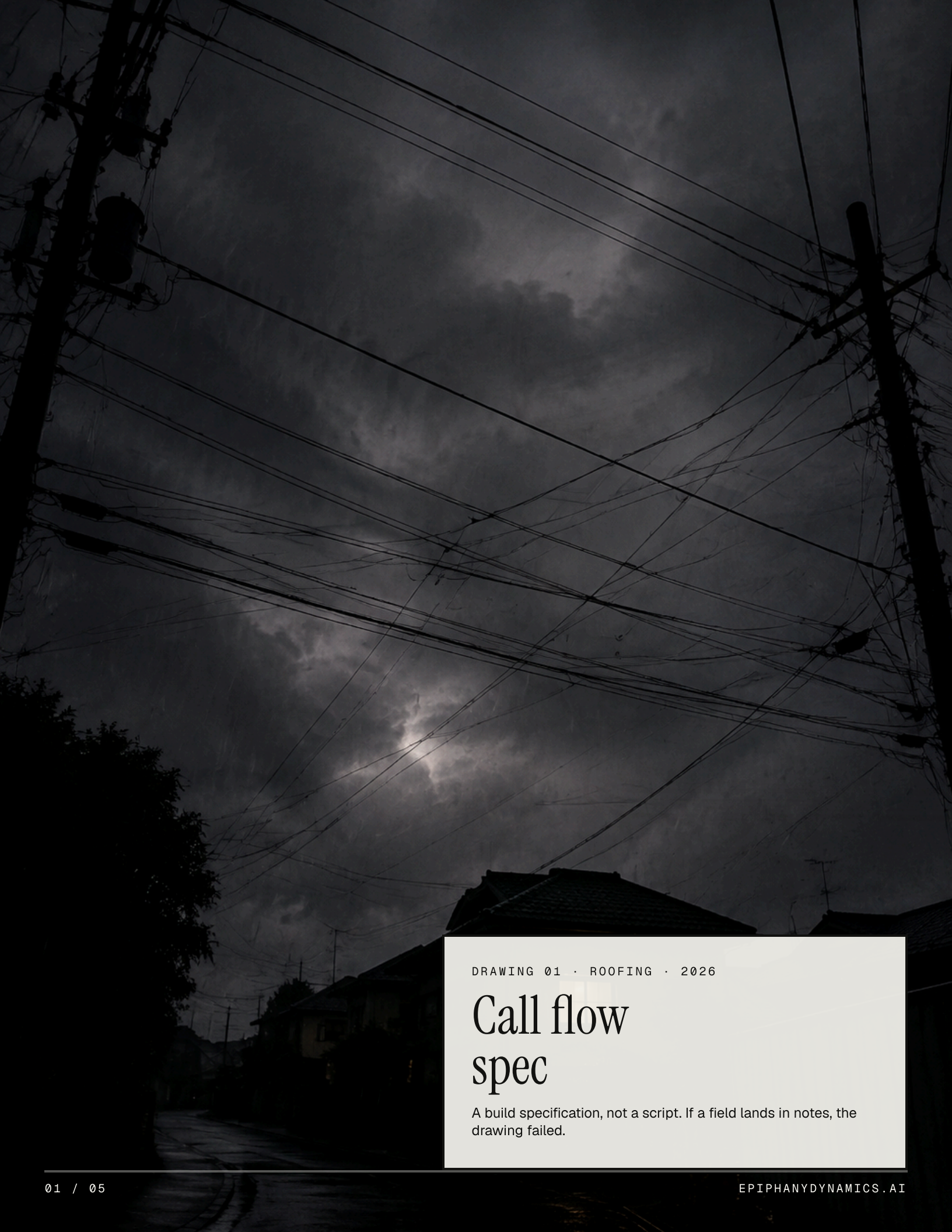


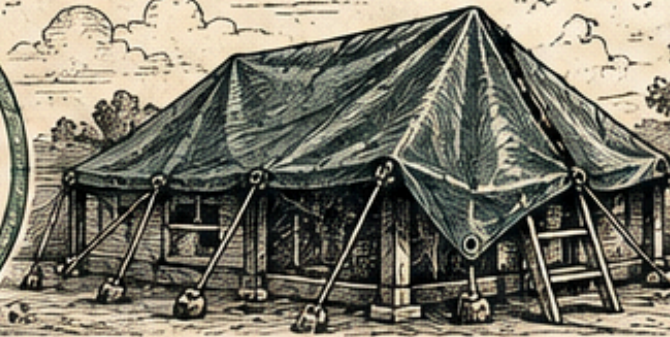
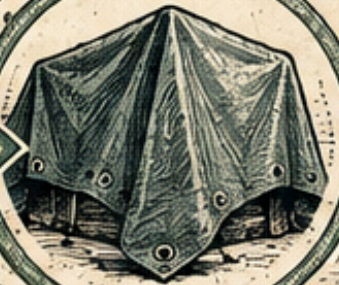


DRAWING 01 · ROOFING · 2026

Call flow spec

A build specification, not a script. If a field lands in notes, the drawing failed.

One greeting. Four branches.



A EMERGENCY

Immediate danger: 911 guidance first. If safe, name, callback, location, then on-call. Do not delay help for intake.

B STORM

Hail or wind damage. Known insurance details only when needed. No promises of coverage.

C ESTIMATE

Planned work. Standard slots only. Do not steal a storm window.

D EXISTING

Find the job by phone; confirm identity before sharing details. Add activity to that job. Check before creating a lead.

Route by the rule, *not the mood.*



A

Safety first. Immediate danger: call 911 and stay clear. Do not delay for six fields. If safe: name, callback, location, then on-call. Never quote or promise arrival.

B

Approval before booking. Confirm who can authorize work. Renters still get urgent safety routing. Collect known claim details only if needed; never infer coverage or dates.

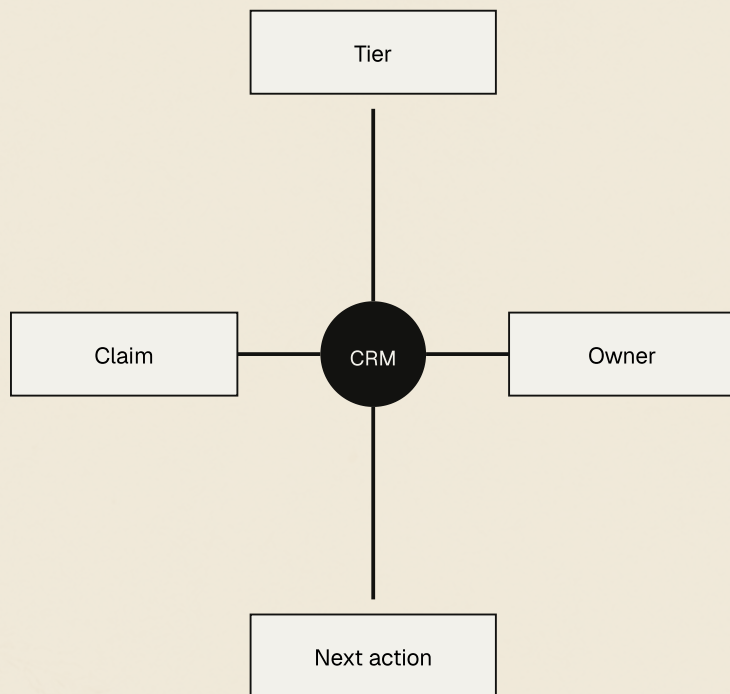
C

Decision maker present before times. Age-related replacement, no-urgency repair, real estate, gutters. No storm context.

D

Warranty to service. Invoice to office. Upset existing customer escalates on the first clear signal.

Named fields. Not notes.



USE WHEN RELEVANT

Tier, damage, approval, payment path, storm tag, next action, date, owner. Approved staff only; no access codes or secrets. Any transcript needs notice, permission where required, restricted access, and a retention rule.

IF WRITE FAILS

Keep the call ID. Alert the office. Check if the record, booking, or message already exists. If unclear, reconcile first. Retry only approved missing work, not the whole call.

AFTER HOURS

Try the named on-call, then backup. No answer: alert the office owner; give only the approved callback window, not an arrival promise. Eligible non-emergencies book valid slots only.



If they cannot show it,
it is not in the drawing.

SHEET 05 · SIGN-OFF

SHOP

Company

CRM

On-call / backup names

Date

CONTROLLED PHONE TESTS

Test leak, renter, claim, commercial, warranty, price-first, and failed-write paths. Use an isolated route and TEST contact/number; alert staff. Block real sends, bookings, and dispatch. Never call 911 in a test. Force failures only there. Verify fields, reconcile, and archive test records.

Companions: Storm Surge Beginner's Guide. Voice Vendor Scorecard. Missed Call Monthly Report.

book.epiphanydynamics.ai