



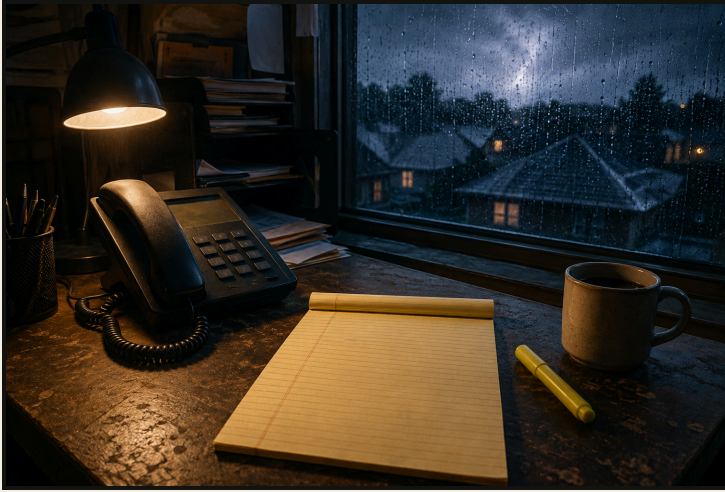
THE BEGINNER'S GUIDE TO STORM INTAKE

PDF

A working checklist for roofing companies.
Print it. Keep a copy at every phone.



Storm weeks need one clear path: turn each call into a record someone can work. A busy phone exposes gaps in capture, routing, and follow-up.



1 **Capture.** Name and callback first. If the call drops, that pair keeps the lead.

2 **Sort.** A tier before hang-up. Emergency, priority, standard, or out of scope.

3 **Route.** Written rules, not whoever picked up at 8pm.

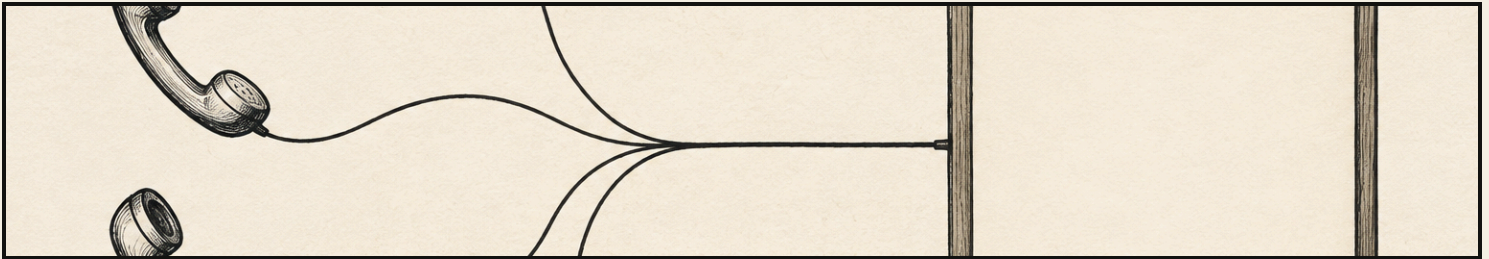
4 **Log the same day.** A record with no owner and no date is a lost lead with extra steps.

Imagine the phone as a subway map.

Every call is a stop. If the line is not written down, trains dump onto the platform in any order and Monday nobody knows which leads were real.

THE ONLY SEQUENCE THAT HOLDS

Call > Tier > Route > CRM. If any box is missing, the next one is fiction.



LOOSE NOTES

A notepad next to the phone. Fine until two people are writing over each other.

UNOWNED QUEUE

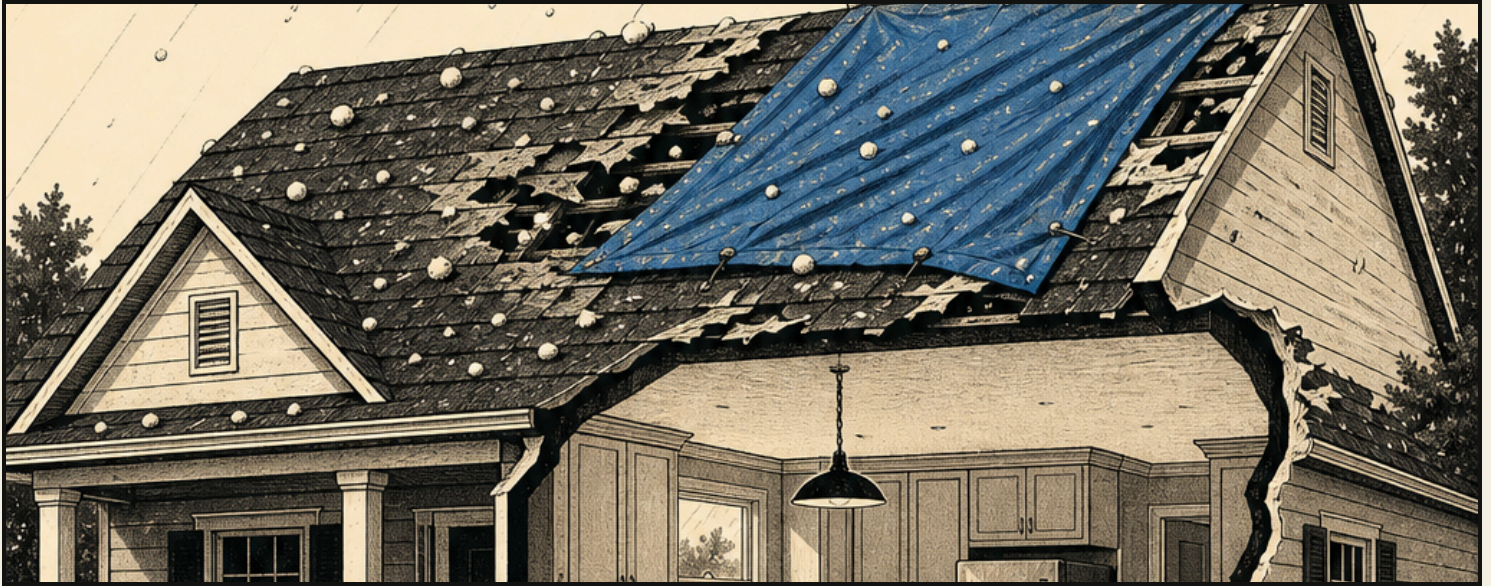
Voicemail as overflow. Monday is a hunt, not a list.

NO STORM TAG

No storm tag. Two weeks later you cannot tell which leads were the surge.



Keep direct numbers in the restricted roster. Write names or roles here, not private numbers. The owner checks the backup and handoff window.



SHOP

Company _____

Storm tag _____

Service zips _____

Estimator rule _____

Hours _____

Tarp supplier _____

Dumpsters _____

Staging address _____

The storm tag is the name you will search in the CRM two weeks later. Invent it before the first call.

ON-CALL TONIGHT

Primary _____

Backup _____

Commercial _____

Overflow _____

Roster location _____

Electrician _____

Tree removal _____

Owner escalate _____

Use the agreed ring time: primary, backup, then owner. No answer: alert the named office owner for a callback. Never promise a crew.



Immediate danger: call 911 and stay clear. Do not delay help for intake. If safe, take name, callback, and location, then route urgent calls. Check work approval before booking.

ASK	WRITE IT HERE
Name. Callback. Texts yes/no?	
Owner or authorized manager? Renter: owner contact. Hold booking until approved; still route urgent risk.	
Insurance or out of pocket? Claim filed? Adjuster assigned?	
Damage type. Missing shingles, hail, wind, tree, water inside?	
Water entering now? Structure exposed?	
Address, unit, dog, safe access needs. No gate or alarm codes, passwords, or payment details here.	
Roof age, prior repair, prior claim. Property type.	
Email. Best time. Circle a tier on the next page before hang-up.	



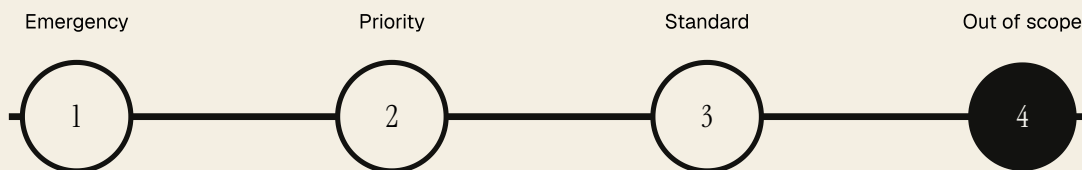
AFTER HANG-UP

- ☐ Name and callback are in the record, not the notepad.
- ☐ Tier is circled. Estimator is named.
- ☐ Storm tag is on the job.
- ☐ If booked, confirm by a permitted channel; honor opt-outs.
- ☐ Overflow has an owner and a window, not voicemail.

Overflow notes:



Safety comes first. Fire, injury, downed power, or immediate danger: call 911 and stay clear. Otherwise pick a tier. Windows below are targets, not promised arrivals.



TIER 1 / URGENT REVIEW

Water entering, exposed decking, tree on the roof.

- ☐ If safe: name, callback, location, then on-call. No answer: backup, then office owner.
- ☐ Do not quote a price. Do not invent an arrival time.
- ☐ Book the estimate as a separate appointment.
- ☐ Circle if this call is Tier 1

TIER 2 / PRIORITY

Visible storm damage, no active leak. Ask about any claim or adjuster visit.

- ☐ Assign estimator by zip, not by who is free.
- ☐ Capture known claim details only when needed. Do not guess coverage.
- ☐ Do not bump this for a neighbor referral.
- ☐ Circle if this call is Tier 2

TIER 3 / NORMAL SLOTS

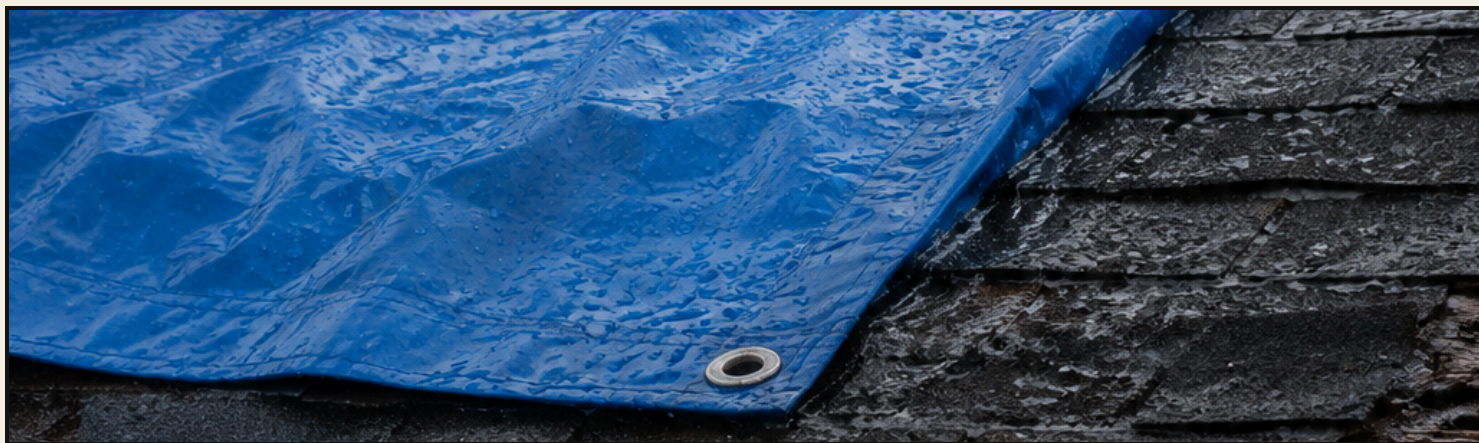
Unconfirmed damage or planned work, with no active danger.

- ☐ Offer the next standard estimate window only.
- ☐ Decision maker present before offering times.
- ☐ Do not steal a Tier 2 slot for this.
- ☐ Circle if this call is Tier 3

TIER 4 / CLOSE THE LOOP

Outside the service map, or work you do not do. Urgent safety guidance still comes first.

- ☐ Refer if you have a name. Do not book.
- ☐ Still capture callback so the loop actually closes.
- ☐ Log as out of scope, not as a dead lead with no note.
- ☐ Circle if this call is Tier 4



Whoever picked up at 8pm is not a routing rule. Write the rule once. Run it on every call, including the ones that start with a price question.



A Urgent. Immediate danger: 911 first. If safe, name, callback, location, then on-call; use the backup path on page 3.

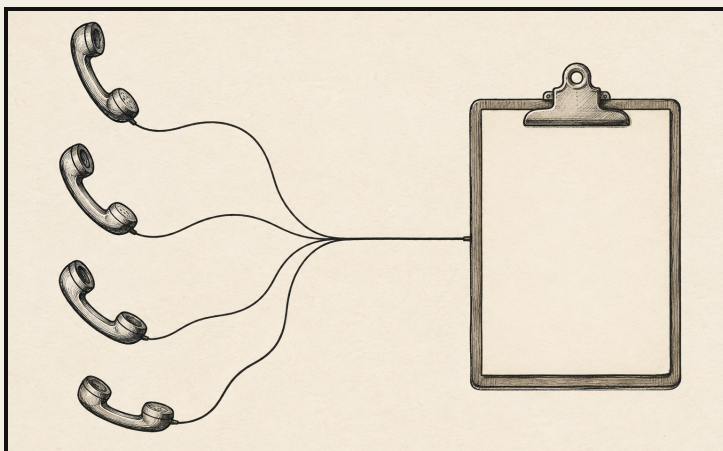
B Estimator. Assign by zip or territory, not by who is free.

C Insurance. Collect known claim details only when needed. No promises about coverage or payment.

D Commercial. Named commercial estimator, separate calendar.

E Overflow. Callback with a stated window and an owner. Not voicemail.

F Existing customer. Open job or warranty goes to service, not sales.



IF TWO RULES COLLIDE

Safety comes first, even for existing jobs. After urgent triage, keep the service owner. Commercial work goes to its estimator. Record any conflict below.



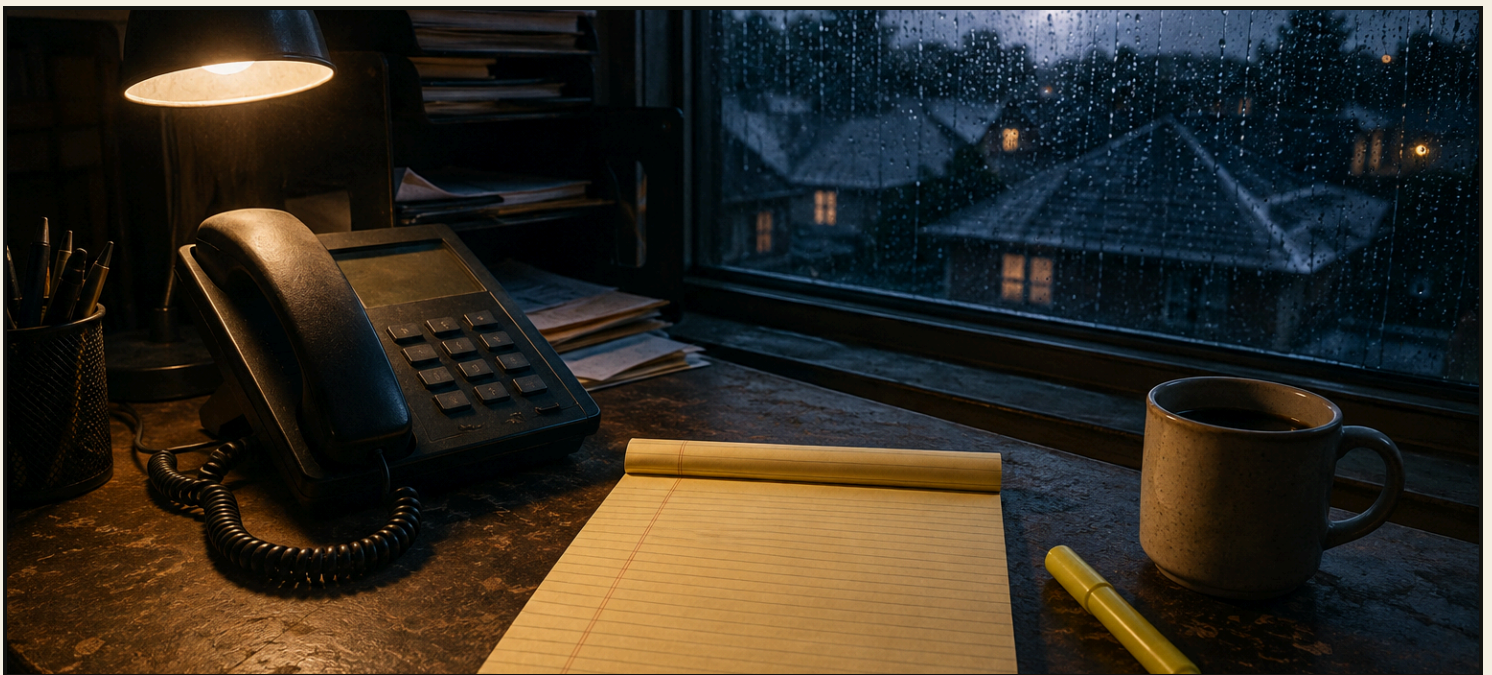
Save the storm tag and needed facts in the approved job record. Limit access to assigned staff. Keep completed sheets secure; follow the retention rule. No secrets in notes or transcripts.



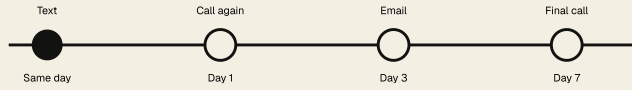
IDENTITY	QUALIFICATION	ACTION
☐ Name	☐ Ownership	☐ Triage tier
☐ Phone + texts	☐ Payment path	☐ Storm event tag
☐ Email	☐ Carrier / claim / adjuster	☐ Estimator + appointment
☐ Service address	☐ Date of loss, roof age	☐ Next action, date, owner

IF THE CRM WRITE FAILS

Keep the call ID. Alert the office. Check if the record or linked booking already exists before retrying. If unclear, the office reconciles it first. Retry only the missing step; do not resend messages.



Example follow-up plan: agree times and permitted channels. Identify the shop. Stop on opt-out. Failed message: the office reviews it; no repeat-send loop. Follow local contact rules.



IF THIS	DO THIS	OWNER / DATE
Booked estimate	Confirm on the permitted channel. Agree reminder times; stop on opt-out.	
Unbooked	If permitted: same-day contact, day 1 call, day 3 email, day 7 final call. Then close or agree a next step; no automatic long-term list.	
Waiting on adjuster	Record the adjuster date. Ask whether help is wanted; do not imply approval or coverage.	
Estimate out	Agree a follow-up date and channel. Ask what is unresolved; stop on opt-out.	



COMPANIONS

Missed Call Monthly Report (Excel) models revenue exposure from your inputs. It is not measured loss, profit, or a promise of recovery.

Voice Vendor Scorecard checks the needed fields on controlled test calls. Use test records and keep real customer data out of the demo.

Free 30-minute audit: book.epiphanydynamics.ai

Shop that ran this page this week:

Company _____
 Owner _____
 Date _____

