

Storm desk intake

A calm packet for a busy phone. Capture the safe next step, not a guess about capacity.

PRINT / WRITE / HAND OFF

Keep the caller safe. Keep the record clear.

Use one packet per shift or storm tag. Write unknown when you do not know. Do not promise an arrival time, coverage, or claim result.



FIRST

Danger beats a full intake. If there is fire, sparking, a collapse risk, gas smell, or someone is hurt, tell the caller to use local emergency service.

NEVER

No roof climb. No electrical troubleshooting. No gate codes on this shared sheet. Use a secure approved channel for private access notes.

THEN

Get name and callback number. Mark the owner. Give a real callback window only when a person owns it.

Print pages 4 + 5 for each caller

The front holds contact details. The back holds the facts and work requested. Give both the same record ID.

Keep pages 2, 3 + 6 at the desk

Agree the shift, safety route and handoff owner before the queue grows.

Use page 7 when the desk falls behind

Find the existing record before creating another. Mark which next action is still open.

Use page 8 before handing over

Honor contact choices, record failed delivery and count from real records, not memory.

Use the next page you need

Shift setup / safety / caller front and back / named handoff / clean record / shift wrap.



Before the first ring

Set the desk before the storm window. A plan names people and limits without promising service.

Shift board

Date / storm tag

Desk lead

Phone owner

Backup owner

Secure record location

Service area rule

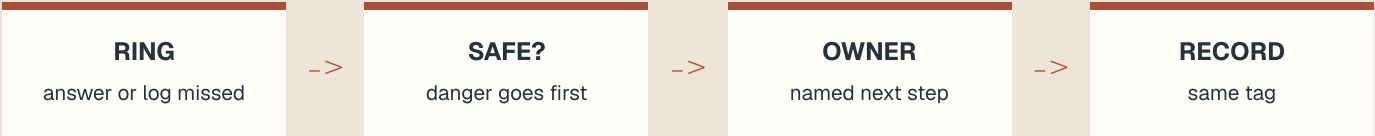
Areas we take

Areas we decline / refer

Work we do not do

Overflow owner + contact

CALL PATH



Capacity rule: Say what you can do next. Do not say "same day," "within 48 hours," or "we cover your area" unless the desk has checked and a named person owns that promise.

Write the limits before calls build

A full queue changes the next step, not the safety rule.
Keep today's owner and approved area visible.



Danger cannot wait for full intake

Ask the safety question early. Keep the caller out of harm and route urgent danger to local emergency service.

1 / Ask:

"Is anyone hurt, trapped, or in immediate danger?"

V

2 / Look from safety:

Fire, sparks, active electrical danger, collapse risk, gas smell, or a tree / line hazard?

V

YES / UNSAFE

Tell the caller to move away and contact local emergency service or the correct utility. Do not troubleshoot. Note the time and owner.

NO / SAFE ENOUGH TO TALK

Continue with name, callback, address, damage, and the next desk action.

Do not ask them to

- climb the roof
- touch wires or panels
- enter a collapsed space
- move a heavy tree

Safety note

Visible from the ground only:

Local emergency route given:

Safety is not a sales category

Immediate danger goes to emergency help. A roofing callback is not a substitute for emergency response.



Caller form · identity first

Fill this side before deep questions. If the call drops, this pair must still reach a human owner.

Record ID / storm tag

Call time / desk owner

CALL DROPPED? Name + callback first. Mark a human owner before the next call.

Caller name	Service address / unit
Callback number	City / ZIP
Can this number take texts? ☐ yes ☐ no ☐ unknown	Caller role ☐ owner ☐ renter ☐ manager ☐ unknown
Best callback window	Owner contact, if renter / manager
Safe way to reach them	Property type

Do not collect here

Passwords, gate or alarm codes, full payment details, or sensitive documents. Use the secure approved channel only.

Unknown is a valid answer

Do not fill a blank with a guess. Mark unknown and give it an owner.



Caller form · facts and scope

Capture what the caller knows. Insurance is a fact path, not an approval or coverage promise.

Same record ID as caller front

Source of facts / time recorded

What is happening?

☐water now

☐exposed area

☐visible damage

☐no active leak

☐unknown

Damage seen from ground

When noticed / date of storm

Rooms or areas affected

Roof age / prior repair, if known

Payment path

☐insurance

☐out of pocket

☐unknown

Carrier / claim number, if offered

Adjuster + appointment, if known

Work requested / goal

Photos or documents? Secure handoff only

Plain fact: Insurance does not mean a claim is approved. Do not promise coverage, deductible, payment, or legal outcome. Record only what the caller says or what the desk has verified.

DESK TIER

☐ urgent safety route

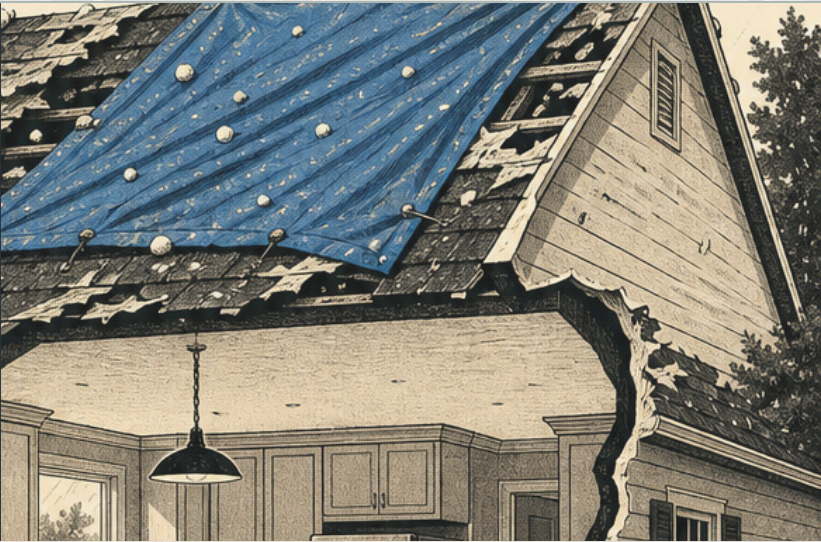
☐ priority review

☐ standard queue

☐ out of scope / refer

Facts are not promises

Record what is known and its source. Leave unknowns with an owner instead of inventing a claim outcome.



One owner. One next action.

A handoff is not complete until the receiving person confirms the callback window or the reason it cannot be set.

Record / caller	Owner	Next action	Confirmed window / status

Handoff check

☐ Name and callback are readable

☐ Safety tier is marked

☐ Owner accepted the record

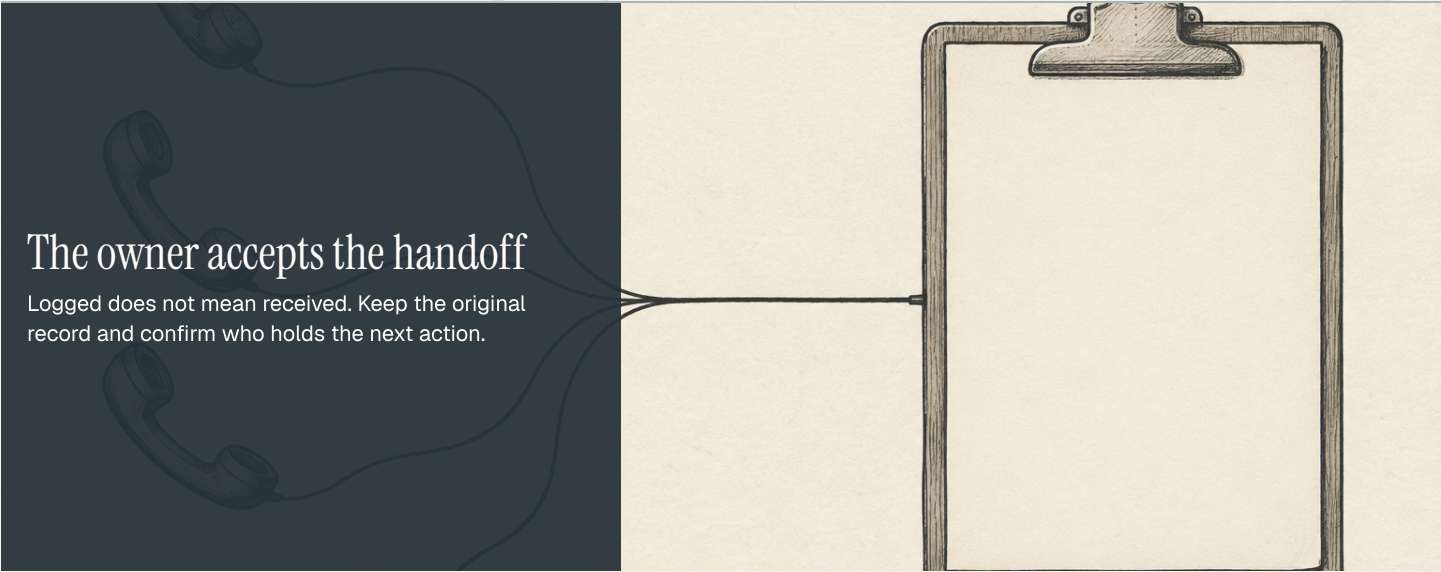
☐ Window is confirmed or marked unknown

☐ No private codes are on the shared page

Say it plainly

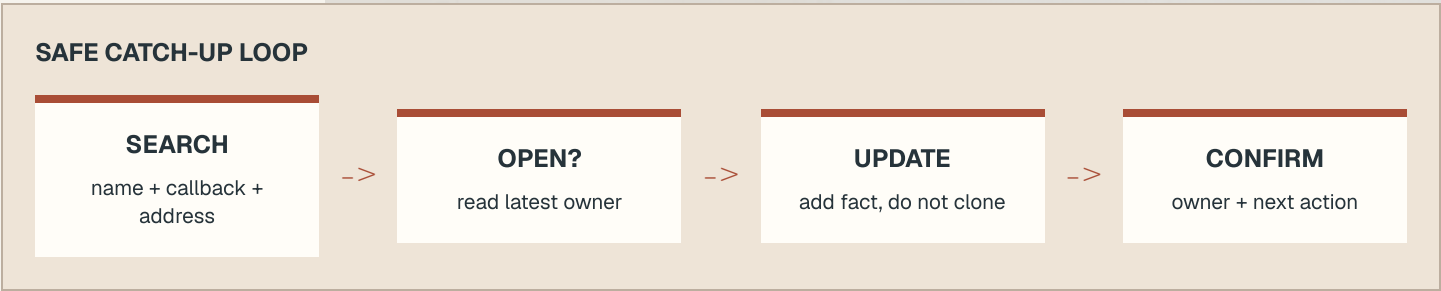
"I have your details. The next owner is _____. They will call during _____."

If no window is known: "I cannot promise a time yet. The owner is _____. We will update you through _____."



Catch up without duplicates

Use this page when the desk is behind. Search before creating a second record. Keep the same storm tag.



Duplicate-safe search

Search terms used

Existing record ID

Existing owner

New fact added

Missed call log

Time / number	Owner	Action / result

Clean record: Mark unknowns. Add source and time. Do not copy private access details into a shared log.

One person can have several calls

Read the current record before adding a new fact. Different needs may need linked records, not a blind merge.



Permission-aware closeout

Follow up only with permission and a clear business identity. End the shift with a record another person can use.

Messaging permission

Text permission ☐yes ☐no ☐unknown

Preferred channel ☐call ☐text ☐email ☐none

Identity used in message

Stop request / preference

Failed delivery / bounce

Message rule

Ask before sending. Say who the business is. Send only through the allowed channel. Honor stop requests. If delivery fails, mark it and give the record to a human owner.

No forced multi-day sequence. No long-term contact without consent.

Shift wrap totals / facts only

Count	Write total	Source / storm tag
Answered calls		
Missed calls		
Urgent safety routes		
Records with owner + next action		
Unknown / needs review		

Shift lead / date

Open items handed to

Secure record checked

