

The Spec Call Flow Design

A practical blueprint for turning a roofing call into a safe, routable, auditable next action.

THE CALL IS A MAP, NOT A SCRIPT

USE THIS WORKBOOK TO

Define the first decision, protect urgent callers, name the fields your team needs, and give builders test cases that reveal a broken route.

OPERATING PRINCIPLE

Collect the least information needed for the next safe step. Escalate danger before qualification. Confirm capacity before promising a person or time.

Safety gate: If there is immediate danger, tell the caller to move to safety and contact local emergency services. Do not keep them answering questions.

02 / Opening and routing

Let the caller name the need. Safety can interrupt any branch.

03–05 / The right branch

Urgent leaks, storm damage, planned work and existing jobs need different questions.

06 / Where facts land

Map each field to the actual destination, owner and failure route.

07–08 / Cover and prove it

Name after-hours backup. Test changes in a safe, isolated setup.

Business / version / date

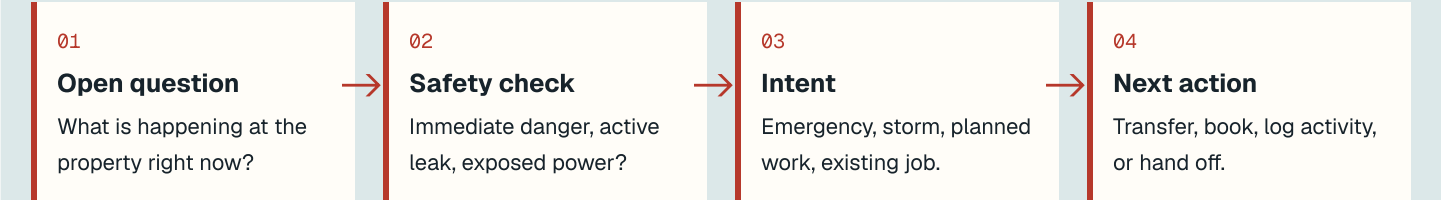
Decision owner / builder contact

A route is a decision

Name the next person, the record and the fallback.

Start with a fork, not a greeting tree.

The opening question should discover what changes the route. "What is happening at the property right now?" is more useful than a menu of departments.



DESIGN THE FIRST 20 SECONDS

01

Ask open.

Invite a description before offering categories.

02

Listen for override.

Danger outranks price, insurance, and booking.

03

Reflect back.

Repeat the route in plain language.

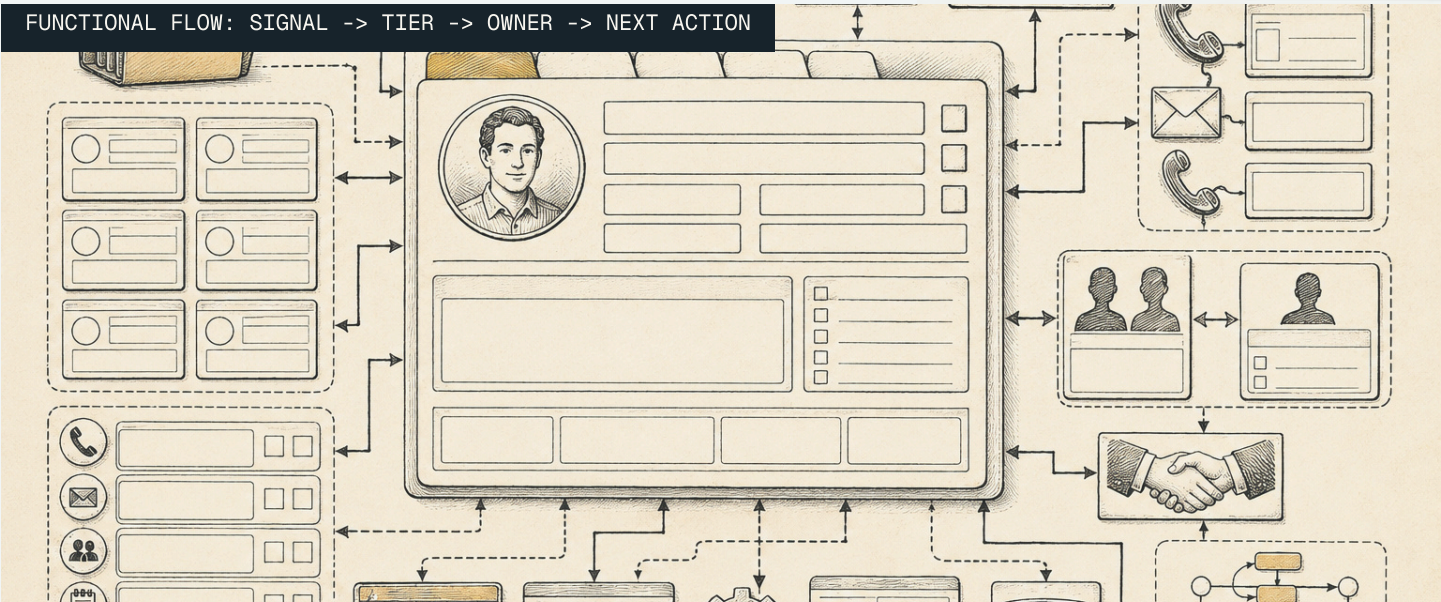
04

Commit narrowly.

Name the next action, not an invented outcome.

BRANCH REGISTER

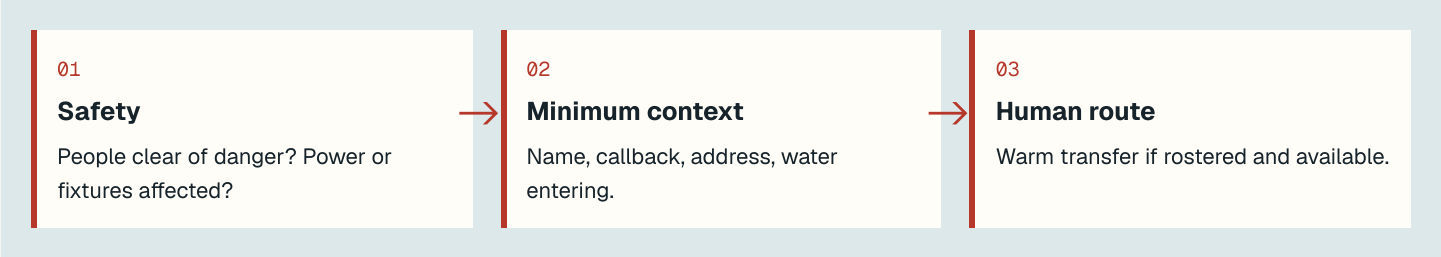
Signal	Route
Immediate danger	Safety guidance + local emergency service
Water / visible damage	Emergency triage
Recent storm	Storm qualification
Existing job	Match and log activity



Emergency leak: safety outranks the sale.

Ask only what helps a safe transfer. A caller does not need to complete a six-field intake before danger is escalated.

Immediate danger? Stop intake. Tell the caller to move away from danger and contact local emergency services. Then follow the agreed human support route.



ASK IN THIS ORDER

☐ Name + callback

☐ Property address

☐ Anyone at property

☐ Where is water entering?

☐ Power or fixtures affected?

☐ Visible hole or tree impact?

NEVER PROMISE

No price on an emergency branch. No invented arrival time. No next-day estimate slot when the issue needs a safety route.

If no one answers, send the approved alert to the owner and backup with the stated callback window. Availability depends on the confirmed roster and capacity.

If the transfer is not answered

Use the approved backup route. Do not send the caller round the same loop or suggest that help is already on the way. Record which person accepted the handoff; unknown is not accepted.



Storm damage: qualify without guessing.

Separate ownership, damage, payment path, and claim context. Ask for a date of loss. Do not infer it from a weather event.

DECISION SEQUENCE

01

Ownership.
Owner, authorized manager, or renter? A renter should not be pushed through the sales path.

02

Damage type.
Choose one controlled value: hail, wind, leak, tree, other.

03

Payment path.
Insurance, self-pay, or unknown. Never discuss covering a deductible.

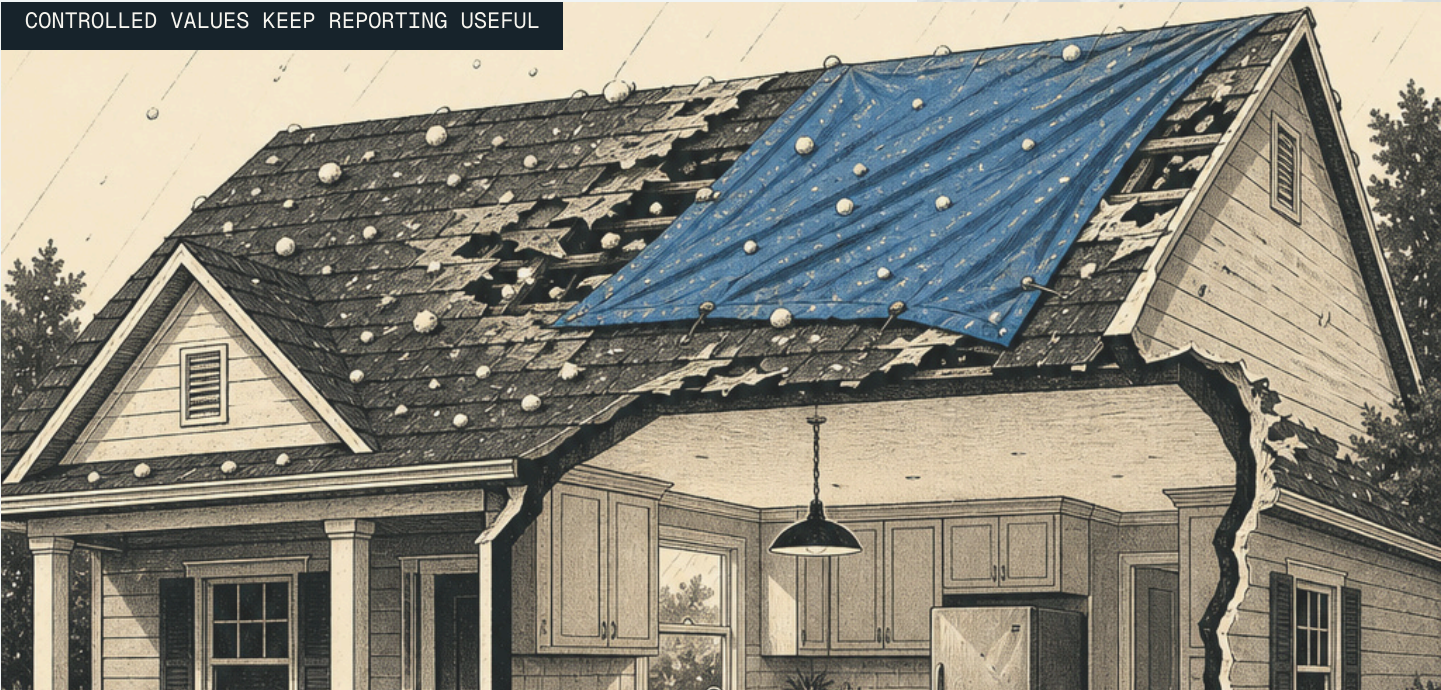
04

Loss context.
Date of loss, carrier, claim number, adjuster appointment if known.

FIELD CHECKLIST

Field	Capture rule
Property type	Residential / commercial / other
Access	Ask, do not assume
Roof age	Caller estimate is acceptable
Claim number	Read back; never invent
Adjuster	Appointment status if known

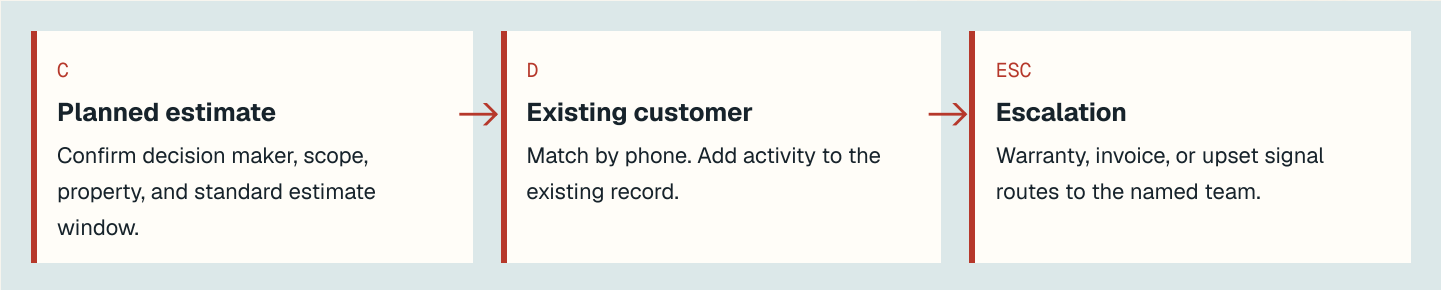
CONTROLLED VALUES KEEP REPORTING USEFUL



Renter signal: explain that the property owner or manager must direct roof work, then offer the approved non-sales handoff. Do not delay a safety response.

Planned work and existing jobs need different records.

A clean flow keeps standard estimates from consuming storm capacity and keeps a returning customer attached to the job already in motion.



BRANCH C / ESTIMATE INTAKE

☐ Decision maker identified

☐ Scope described in one sentence

☐ Property and access captured

☐ Standard window offered

☐ Storm urgency checked first

☐ Next action and owner named

BRANCH D / EXISTING RECORD

Search by phone, confirm the matching property, then log the call as activity. Do not create a new lead because the caller used a new phrase.

Escalate early: warranty, invoice, missed promised callback, or a clear upset signal. The agent should not improvise policy.

Signal	Record action	Owner / next action
New planned work	New estimate record	
Existing job	Activity on matched job	
Warranty / invoice	Escalation activity	

Keep the job attached to its owner

For an existing job, confirm the record through the approved identity check before discussing private details. Add the new fact to that record. Do not create a second sales lead or expose another customer's job.



Named fields beat a paragraph of notes.

Map only fields your approved platform actually supports. Leave unknown values blank or mark unknown. Never fabricate a CRM schema.

PLATFORM MAP

Approved platform	Field to verify
Platform: _____	Record type: _____
Platform: _____	Job type: _____
Platform: _____	Workflow stage: _____
Other: _____	Insurance fields: _____

Builder: replace blanks with the live platform's exact labels before implementation.

EVERY ROUTE SHOULD LEAVE

☐ Triage tier

☐ Ownership

☐ Storm tag

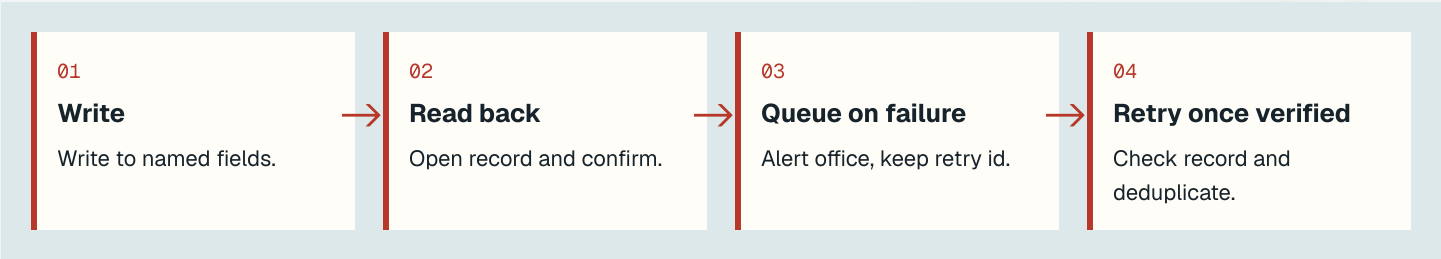
☐ Next action + date

☐ Damage type

☐ Payment path

☐ Transcript link

☐ Named owner



Failure policy: queue the payload, alert the office, and retry only after checking the record and deduplication key. A silent failure is not a completed call.

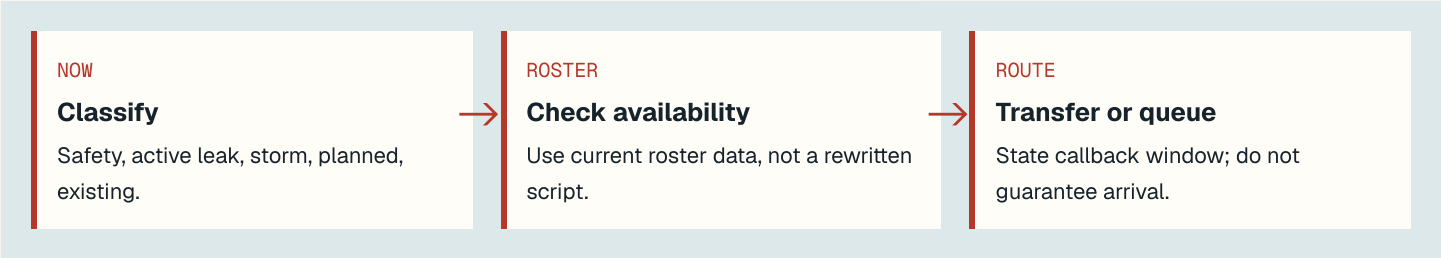
A save is not a completed handoff

Check the exact saved record and the destination that should receive it. If only one side worked, keep its receipt and send the missing part to the named owner. Do not replay the whole call or create another copy.



Night routing is a capacity decision.

Emergency support can be offered only through a confirmed roster and capacity.
Non-emergency work can qualify and book without waking the tarp crew.



ROSTER REGISTER

Role	Confirmed person / window
On-call lead	
Backup	
Morning owner	
Last verified	

MORNING HANDOFF PACKET

☐ Sorted by triage tier

☐ Callback window stated

☐ Owner named

☐ Record link included

☐ Unknowns labeled

☐ No voicemail-only queue

If no rostered person is available, give the approved fallback and local emergency guidance when relevant. Do not imply guaranteed response.

No one has accepted the duty

Do not publish a person’s name as available because they appear on an old roster. Use the current fallback and a truthful callback message until the owner confirms coverage. Record the date, window and time zone.



A tidy transcript is not a tested flow.

Test each branch in a builder-managed sandbox with synthetic callers. Suppress real on-call pages, CRM sends, and customer messages.

Test boundary: Never force a production outage or create a fake overnight emergency. Use a sandbox, synthetic records, and a clearly labeled test number.

Scenario	Expected route + field proof	Pass / notes
Active leak at night	Safety gate, human route if available, no arrival promise	
Renter with no danger	Stop sales path, approved owner / manager handoff	
Claim number read-back	Exact field, not notes; transcript linked	
Commercial property	Property type and authorized contact captured	
Warranty complaint	Existing record activity + escalation owner	
Price asked first	Open question still discovers urgency before quote	
CRM write fails	Queue + alert + safe retry; no duplicate record	

PROOF CHECKLIST

☐ Open correct record

☐ Fields landed correctly

☐ No secrets in transcript

☐ Alerts stayed in sandbox

COMPANIONS

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

Next: book.epiphanydynamics.ai

