



NOT A SLIDE DECK

Voice vendor scorecard

Take this to any demo. Yes = 2. Partial = 1. No = 0. Require proof on a controlled test call or in the tool settings.

Ask for a test call, *not a slide.*

#	CAN THEY PROVE THIS ON THE CALL?	Y P N	PROOF
1	Classifies emergency, new work, and existing-customer in the first two exchanges.	☐ ☐ ☐	
2	Immediate danger: 911 guidance first. Otherwise on-call, backup, then office-owned callback. No arrival promise.	☐ ☐ ☐	
3	Name and callback before any long list. Dropped call still leaves a lead.	☐ ☐ ☐	
4	Renter without owner: stop sales path. Record owner contact. Do not book.	☐ ☐ ☐	
5	Carrier, claim, adjuster, date of loss, tier, next action in named CRM fields. Not notes.	☐ ☐ ☐	
6	Real estimator calendar by territory. Two or three real times. Does not invent slots.	☐ ☐ ☐	
7	After hours: urgent calls use the backup path. Only eligible callers book real slots. No dispatch for a referral.	☐ ☐ ☐	
8	An authorized owner can update the roster through its documented control, with history and a way to undo it.	☐ ☐ ☐	
9	Failed write: keep call ID, alert, check existing records and actions. Retry only missing work; no duplicates.	☐ ☐ ☐	
10	Hard escalation: human request, upset customer, legal, deductible pressure, media.	☐ ☐ ☐	
11	Recording/transcript: notice, permission where required, restricted access, retention + deletion. Or prove capture is off.	☐ ☐ ☐	
12	You own the config. The flow is versioned. They can name what they will not automate.	☐ ☐ ☐	

SEVEN TEST CALLS

Open the test record after each call.

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 here; reconcile and archive test records after each run.

1 **Simulated leak.** Danger gets 911 guidance; otherwise transfer to the test on-call. ☐ pass

2 **Renter.** Wants an estimate. Stop sales. Take owner contact. ☐ pass

3 **Claim number.** Hail. Number read back into a named field. ☐ pass

4 **Commercial.** Commercial calendar, not residential overflow. ☐ pass

5 **Warranty.** Existing job. Activity, not a new lead. ☐ pass

6 **Price first.** Still classifies. Does not invent a number. ☐ pass

7 **CRM write fails.** Check before retry. One record, no repeat actions. ☐ pass

Add it up. Then decide.

TOTAL 0-24

GO / HOLD / NO

VENDOR

If 1, 2, 5, 9, or 11 is a No, hold. Any unsafe result also means hold. A total is not proof that a system is safe.

NAMED FIELDS / WHEN NEEDED

☐ Name

☐ Callback + permission

☐ Email

☐ Address

☐ Ownership

☐ Payment path

☐ Carrier

☐ Claim number

☐ Adjuster

☐ Date of loss

☐ Tier + storm tag

☐ Next action / owner
