

Emergency Trade Intake Kit

A starter kit for plumbing, roofing, restoration, and urgent-response trade teams that need better intake quality when calls arrive under pressure.

Plumbing, roofing, restoration, and urgent-response trade operators

GUIDE

A starter kit for plumbing, roofing, restoration, and urgent-response trade teams that need better intake quality when calls arrive under pressure.

WHAT THIS ASSET COVERS

- Plumbing Emergency Intake Checklist
- Roofing Storm Lead Intake Script
- Restoration First Notice of Loss Worksheet
- After-Hours Call Intake Script for Service Businesses

SUGGESTED ROLLOUT

1. Standardize how urgent calls are captured across trades.
2. Improve note quality so dispatch and estimators start with clearer context.
3. Use storm and loss worksheets when surge demand creates intake chaos.
4. Reinforce after-hours coverage so late calls still move confidently into the next step.

WORKING ASSET

Includes:

- Plumbing Emergency Intake Checklist
- Roofing Storm Lead Intake Script
- Restoration First Notice of Loss Worksheet

- After-Hours Call Intake Script

USE THIS KIT TO

- improve urgent-call note quality
- route emergency work faster
- standardize intake across surge events

DEPLOYMENT NOTES

HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Emergency Trade Intake Kit" become shared but unmanaged work.
- Use it with plumbing, roofing, restoration, and urgent-response trade operators in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

30-DAY ROLLOUT SEQUENCE

- Standardize how urgent calls are captured across trades.
- Improve note quality so dispatch and estimators start with clearer context.
- Use storm and loss worksheets when surge demand creates intake chaos.
- Reinforce after-hours coverage so late calls still move confidently into the next step.

WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: Plumbing Emergency Intake Checklist, Roofing Storm Lead Intake Script, Restoration First Notice of Loss Worksheet, and more.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.