

Roofing Storm Lead Intake Script

A free roofing storm intake script for capturing damage context, insurance timing, property urgency, and inspection readiness when weather-driven leads spike.

Roofing owners, office teams, storm-response coordinators, and sales admins

GUIDE

A free roofing storm intake script for capturing damage context, insurance timing, property urgency, and inspection readiness when weather-driven leads spike.

WHAT THIS ASSET COVERS

- A storm-lead call flow covering damage type, timing, access, and occupancy
- Prompts for insurance status, emergency tarp need, and inspection scheduling
- A note structure for sales, estimator, and claims follow-up

USE THIS WHEN

1. You get weather spikes that overwhelm the office
2. Storm leads arrive with incomplete notes and weak next steps
3. You want a cleaner transition from first call to inspection booking

WORKING ASSET

OPENING

"Thanks for calling. I can help get the right details so we move this quickly."

ASK IN ORDER

1. What happened and when did you first notice it?
2. Is there active leaking or interior damage right now?

3. Is this residential or commercial?
4. Have you contacted insurance yet?
5. Can someone be on-site for inspection access?

COLLECT

- property address
- roof type
- visible damage notes
- tarp or emergency service need
- best contact and timing

CLOSE

"We've got the right notes. The next step is inspection scheduling and we'll confirm the window with you."

DEPLOYMENT NOTES

HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Roofing Storm Lead Intake Script" become shared but unmanaged work.
- Use it with roofing owners, office teams, storm-response coordinators, and sales admins 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.

HOW TO GET STRONGER OUTPUTS FROM MODERN AI MODELS

- Start with a compact context packet: business type, customer situation, service offered, tone guardrails, and any facts the model must preserve.
- State the deliverable shape up front: channel, word count, required fields, and the exact output format you want back.
- Use variables and clear delimiters so the prompt can be reused safely by staff without rewriting the entire instruction every time.

- Include one strong example when tone and structure matter, then ask for a final answer only rather than hidden reasoning.
- Add a final self-check step for compliance, specificity, and whether the response actually sounds like a real operator wrote it.

BEST DEPLOYMENT SEQUENCE

- You get weather spikes that overwhelm the office
- Storm leads arrive with incomplete notes and weak next steps
- You want a cleaner transition from first call to inspection booking

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: A storm-lead call flow covering damage type, timing, access, and occupancy, Prompts for insurance status, emergency tarp need, and inspection scheduling, A note structure for sales, estimator, and claims follow-up.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.