

# Wet Basement Intake Checklist for Waterproofing Leads

A free intake checklist for waterproofing and foundation teams handling wet-basement, seepage, and drainage inquiries that need better qualification before inspection.

Waterproofing owners, office teams, estimators, and intake staff

## GUIDE

A free intake checklist for waterproofing and foundation teams handling wet-basement, seepage, and drainage inquiries that need better qualification before inspection.

## WHAT THIS ASSET COVERS

- A first-call sequence for water source, basement condition, frequency, and access
- Prompts for sump, grading, crack, and prior repair context
- A handoff note pattern for estimators and inspection teams

## USE THIS WHEN

1. Leads call after storms or repeated seepage problems
2. Inspection notes arrive incomplete
3. The office needs better qualification before dispatching estimates

## WORKING ASSET

## CAPTURE FIRST

- address
- callback number
- active water now or not
- rain-related or ongoing issue
- finished or unfinished basement

## CLARIFY

- cracks visible
- sump pump present
- prior waterproofing work
- photos available

## HANDOFF

- urgency level
- best inspection window
- access notes

## DEPLOYMENT NOTES

### HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Wet Basement Intake Checklist for Waterproofing Leads" become shared but unmanaged work.
- Use it with waterproofing owners, office teams, estimators, and intake staff 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.

### BEST DEPLOYMENT SEQUENCE

- Leads call after storms or repeated seepage problems
- Inspection notes arrive incomplete
- The office needs better qualification before dispatching estimates

### 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 first-call sequence for water source, basement condition, frequency, and access, Prompts for sump, grading, crack, and prior repair context, A handoff note pattern for estimators and inspection teams.

- A built-in review cadence so the document becomes part of operations rather than a one-time download.