

XPERIENCE Roofing

Automated Lead Generation System

Technical Specification v0.1 — February 4, 2026

Executive Summary: Build an automated system that identifies older homes likely needing roof work (via Utah parcel data), enriches records with owner contact info (skip tracing), and enables targeted outreach (email, phone, mail).

Out of scope: Aerial roof analysis (covered in separate document)

1. Data Acquisition: Utah Open SGID

1.1. What We Have Access To (FREE)

Utah's Open SGID is a **public PostGIS database** containing all state parcel data.

```
Host: opensgid.ugrc.utah.gov
Port: 5432
Database: opensgid
Username: agrc
Password: agrc
```

1.2. Key Data Points Available

Field	Description	Use Case
parcel_add	Property address	Target address, skip trace input
built_yr	Construction year	Age filtering (15+ years = target)
primary_res	Primary residence flag	Filter to residential only
total_mkt_value	Market value	Prioritize high-value homes
bldg_sqft	Building size	Additional filtering

Note: Owner names are NOT in the parcel data. Skip tracing handles owner identification.

1.3. Live Data Stats (Salt Lake County)

271,560 homes that are 15+ years old

Data freshness: Updated regularly | Access: FREE, public

2. Skip Tracing / Contact Enrichment

2.1. The Problem

Parcel data gives us: property address + basic info

We need: phone number + email address + owner name

2.2. Option A: PropStream (RECOMMENDED FOR MVP)

Plan	Monthly	Skip Tracing
Essentials	~\$99	\$0.12/each
Pro	~\$149	FREE
Elite	~\$199	FREE

Why PropStream:

- Built specifically for real estate
- Skip tracing included FREE on Pro/Elite plans
- DNC flagging + litigator scrubbing included
- 7-day free trial to test
- 50,000 saves/month on Pro plan

2.3. Option B: BatchData (FOR SCALE)

Full API access for automation. Contact Enrichment add-on: \$500-2,000/mo depending on tier.

Best for: When ready to fully automate at high volume

2.4. **✗ NOT Recommended**

- **TruePeopleSearch** — ToS prohibits commercial use, heavy bot detection
- **Apollo.io** — Great for B2B, but poor for residential homeowners

3. System Architecture

OPEN SGID → SKIP TRACING → OUTREACH

(Parcel DB) → (PropStream/BatchData) → (Email/Phone/Mail)

3.1. Outreach Channels (by compliance risk)

Channel	Risk	Requirements
Email	LOW	CAN-SPAM compliance
Direct Mail	NONE	Just cost
Manual Phone	MEDIUM	DNC scrub, no autodialer
SMS	HIGH	Requires opt-in — avoid cold

4. Compliance Summary

4.1. Email (CAN-SPAM)

- Can send cold emails to homeowners
- Must include physical mailing address
- Must have working unsubscribe
- No deceptive subject lines

4.2. Phone (TCPA)

- Manual dialing to cell phones OK
- Must check National DNC Registry
- No autodialers to cell phones without consent

Penalties: TCPA: \$500-\$1,500 per violation

5. MVP Implementation Plan

Week	Tasks
1	Write Open SGID extraction script, test with 1,000 records
2	Sign up PropStream trial, run skip trace, analyze match rate
3	Set up email tool, create sequence, send to 500 test records
4	Analyze results, refine targeting, decide on scale path

6. Cost Projections

6.1. MVP (1,000 leads/month)

Item	Monthly Cost
Open SGID	FREE
PropStream Pro	\$149
Email tool (Instantly)	\$37-97
Total	~\$186-246/mo

6.2. Scale (10,000 leads/month)

Item	Monthly Cost
Open SGID	FREE
BatchData (Growth)	\$2,000
Email tool (Instantly Pro)	\$97

Total	~\$2,100/mo
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7. Open Questions

1. **Target geography:** Start with Salt Lake City only, or broader?
2. **Age cutoff:** 15 years is standard — adjust based on preference?
3. **Volume goals:** How many leads/month is the target?
4. **CRM integration:** What CRM does XPERIENCE use?
5. **Email domain:** Need dedicated domain for cold email

Prepared for XPERIENCE Roofing — February 2026