

**PRO-ROOFING + RESTORATION**

**Standard Operating Procedure (SOP)**

**D2D Sales Guide**

# **📋 Table of Contents**

1. Strategic Lead Development Process & Job Statuses
2. New Prospect Checklist
3. Photo Checklist
4. How to Ask for Referrals
5. Adjuster Appointment Checklist
6. Contract Signing Checklist
7. Prospect to Approved Checklist
8. Install Checklist
9. Overcoming Objections Cheat Sheet
10. Door-to-Door Script
11. Transition Lines to Advance the Sale

# **1. 🚪 Strategic Lead Development Process & Job Statuses**

**Daily Goal**: 50 Doors ➝ 10 Conversations ➝ 1 Claim Filed

**Steps**:

* Select recent storm map/date in HailTrace
* Scout neighborhoods for storm damage signs:  
  + Missing/creased shingles
  + Repaired or patched areas
  + Old or bruised roofs
  + Debris in yard
* Pin damaged houses in HailTrace using the "Storm Damage" icon (keep 100 contacts minimum)
* Log all interactions in Acculynx under “Lead” with:  
  + First name
  + Property address
  + Phone number (preferred)
  + Conversation notes

**Statuses**:

* **Lead**: No claim yet
* **Prospect**: Claim filed + Authorization form signed
* **Submitted for Approval**: Contract signed + Profile updated

📝 *Track all “Did Not Answer”, “Not Interested”, or “Renters” in HailTrace with appropriate icons.*

# **2. ✅ New Prospect Checklist**

**Must-Have Before Leaving Customer’s Home**:

* ✓ Name, Address, Phone, Email
* ✓ Photos (See Photo Checklist)
* ✓ Show video inspection
* ✓ Call in claim on speakerphone
* ✓ Adjuster appointment scheduled (2–3 days)
* ✓ Signed Authorization Form
* ✓ Insurance info & storm date
* ✓ Educate on pricing & payment structure
* ✓ Give folder + discuss colors
* ✓ Stake yard sign
* ✓ Ask for referrals (Page 4)
* ✓ Knock neighborhood with SLAP formula
* ✓ Leave door hanger & send direct mail
* ✓ Upload to Acculynx same day
* ✓ Send video message next morning

# **3. 📸 Photo Checklist**

**Take the Following Photos**:

* Front elevation
* Rear elevation
* Left & right sides
* Roof close-ups (damage)
* Gutters/downspouts
* AC unit (hail damage)
* Window screens/siding (if applicable)

🖍️ **Marking Guidelines**:

* Mark wind damage with a chalk line through the center of each affected shingle
* Circle hail dings with parentheses
* Tally count for each slope (Front, Back):  
  + Example: F - W = 10 or B - H = 8
* Take photo of each tally and upload to Acculynx with all other inspection photos

# **4. 🔁 How to Ask for Referrals**

**Direct Approach**:  
 “Who do you know that might need their roof looked at like I helped you today?”

**Indirect Approach**:  
 “Who are the neighbors I need to watch out for when we clean up debris?”

**Ask to be introduced**:

* Walked over
* Group text + video intro

🎯 Pro Tip: Ask for referrals multiple times throughout the process.

# **5. 📞 Adjuster Appointment Checklist**

* Call adjuster day before
* Arrive 15 minutes early
* Set up ladder
* Walk homeowner through expectations
* Support the adjuster
* Request to be CC’d on report
* Explain pricing & payment again
* Ask for referrals again!
* Reminder: Follow up on Day 10 if no report
* Send follow-up video message

# **6. 📝 Contract Signing Checklist**

* Call homeowner upon receiving report
* Schedule review within 24 hours
* Order Eagleview
* Ensure profile is updated with:  
  + Authorization form
  + Adjuster report
  + Photos
  + Basic info
* Review report and sign contract
* Explain payment structure again
* Reference Page 7 (Prospect ➝ Approved)

# **7. 🏁 Prospect ➝ Approved Checklist**

* Fill out contract fully (write N/A where needed)
* Spell out all trades clearly (e.g., Full Gutter Replacement/White/5")
* Update Acculynx profile with:  
  + Email, address, phone(s), names
* Tag CSM & Production in Acculynx
* Submit customer profile
* Job message title: “Submit for Approval”
* Include first check status + mortgage info
* Mention any needed supplements
* All communication/documents in Acculynx ONLY

# **8. 🧰 Install Checklist**

* Arrive at 9am
* Complete digital checklist
* Speak to homeowner
* Visit the next day to inspect cleanup
* Inform office will handle remaining docs
* Ask for referrals (again!)

# **9. 🧠 Objections Cheat Sheet**

**Common Objections & Responses**:

* “I need to think about it” ➝ “Totally understandable. What part are you unsure about so I can leave you with the right information?”
* “I need to talk to my spouse” ➝ “I understand you would like to speak with your spouse first! What is a better time this afternoon to swing by to go over what next steps would look like?”
* “Not interested” ➝ “No problem! Any reason I couldn't send you my info so you can review it before deciding or in case something changes?”

💡 *Stay calm, friendly, and helpful.*

# **10. 📣 D2D Script**

**S-L**: “Hey, I’m [Name] with [Company]... I’m helping homeowners in your neighborhood from the recent storms that have come through.”

**A**: “We’ve already helped several neighbors get their roof approved by their carrier due storm damage. It looks like you might have similar damage. Where are you at in the process?”

**P**: “If you’ve got just a few minutes, let me take a quick look for you. I'll take a video and bring your roof down to you with any findings, show you what it looks like, explain your options if need be and we can go from there.”

**Response after ARO**: “Who is your insurance carrier?”

Then present and go grab the ladder!

# **11. 🔄 Transition Lines to Advance the Sale**

* “Can you see any reason why you wouldn’t want to move forward?”
* “Does that make sense?”
* “Is that fair?”
* “Fair enough?”
* "Where are you at in the process?"
* "How has the insurance process been for you?"
* "When was the last time you had your roof looked at?"

➡️ *Use these after explaining each step to keep momentum going.*

**Let’s win the day: 1 claim a day / 3 a week minimum!**