

Roofing Estimate-Request Intake Checklist

Use this to set up or review a first-contact homeowner form. It is not a price quote, inspection report, or consent form.

Review date _____	Form URL _____
Owner _____	Next action _____

1. Collect the minimum

- [] Homeowner name and at least one usable contact method.
- [] Property ZIP code or address, so the office can check service-area fit.
- [] A plain-language request type: repair, replacement, inspection, or not sure.
- [] An optional short description in the homeowner's own words.
- [] An optional preferred contact time or communication preference.

2. Keep inspection questions for later

- [] Do not require roof measurements, damage diagnosis, claim details, photos, or a final material choice just to request help.
- [] Ask for more only when the office has a clear reason and the homeowner is comfortable sharing it.

3. Check the handoff

- [] The confirmation says the request was received - not that an inspection, price, or coverage decision is confirmed.
- [] The office can see the request, name one owner, and write a specific next action.

Usability test: can a homeowner complete this on a phone without knowing roofing terminology?

Use your own privacy and communications notice where your process requires one.
Companion guide: kaldwick.com/blog/what-happens-after-roofing-estimate-request