

Use this checklist on every project. Check each box when complete.
Great communication builds trust — and trust builds referrals.

STAGE 1: FIRST RESPONSE

Acknowledge every lead the same day

Even a brief auto-reply confirms receipt and sets the tone.

Confirm preferred contact method

Phone, text, or email? Match how they want to communicate.

Set expectations for next steps

Inform them about when to expect the estimate and what they should prepare.

STAGE 2: ESTIMATE DELIVERY

Send appointment reminder 24 hours before

Text or call with date, time, and who's coming.

Deliver a digital proposal

Include scope, materials, options, warranty, photos, financing - not just a number.

Walk the homeowner through the estimate

Reach out via call or text to clarify important decisions and encourage any questions.

Follow up within 48 hours if no response

"Just a simple, 'Do you have any questions about the proposal?' is all it requires."

STAGE 3: BEFORE & DURING THE JOB

Send an install reminder the day before

Crew arrival time and what the homeowner should prepare.

Provide updates for multi-day jobs

A brief end-of-day summary: What's completed and what's ahead.

Flag any changes immediately

Before taking action, ensure you communicate any changes regarding scope, timeline, or costs.

STAGE 4: JOB COMPLETION & FOLLOW-UP

Share before & after photos at completion

Document the complete scope. Homeowners appreciate having concrete evidence.

Confirm satisfaction before leaving

"Is there anything you would like us to review before we leave?"

Send payment link or invoice digitally

Make it easy to pay—don't rely solely on checks by mail.

Request a Google review 2–3 days after completion

Send a direct link while the experience is still fresh.

Ask for a referral at the right moment

'We'd love to help anyone you know.'

QUICK REMINDER

- 87% of homeowners want scheduling notifications by text — make it your default.
- 66% are more likely to call a roofer who shows pricing online. Add a price range to your website.
- 67% of homeowners get three quotes. Your communication can be the difference in who they choose.