

# CROWN

## ROOFING & SOLAR

### Crown Roof Sale Workflow/Job Cycle

---

Inspection Photos - Upload to CompanyCam

Sign Contingency - Upload to Jobnibus

File Claim with Insurance Company

- Explain Referral Program & Ask for Referrals (first time you deliver value, ask!)



- Briefly Mention Solar to warm them up for later (the referrals will lead you into it)

\*Send Welcome Email (talks about referral program)

Adjuster Meeting

Obtain Scope of Loss - Upload to Jobnibus

- Pitch Solar (keep your insurance money, tax rebates on entire project, let me show you the numbers--you'll be surprised)

Create Solar Proposal with roof included

Present Solar Proposal with roof included

Sign Roof Work Order - Upload to Jobnibus

- Ways to cover deductible: financing, referrals, acv funds of work not doing
- Ask for referrals! (you just delivered a shit ton of value)

Sign Construction Checklist - Upload to Jobnibus

Sign Appraisal Demand Letter

Collect Deposit (if not doing solar) - Upload to Jobnibus

\*Send Pre-Build Email (talks about referral program)

\*Office Duty



## ROOFING & SOLAR

### Crown Roof Sale Workflow/Job Cycle

---

Submit PWO

\*Order Materials

- Material Drop Date:

\*Pull Permit

\*Schedule Build

- Build Date:

Pre-Build Photos (photo of materials on site) - Upload to CompanyCam

Build Photos (photos of every material being removed & installed) - Upload to CompanyCam

Final Roof Photos (roof complete - photos of all metal components & flashings on roof) - Upload to CompanyCam

Sign Certificate of Completion - Upload to Jobnimbus

- Ask for referrals!!! (massive value delivered at this point!)
- Prep Customer for Carrier pushback from the invoice. (have customer respond, "Thanks I'll notify my contractor")
- Explain if we send them an intent to lien we are not actually going to do it, it is just to show insurance to get them to pay

\*Final Invoice Insurance

Collect RCV Check - Upload to Jobnimbus

\*Negotiate Invoice with Insurance

- Appraisal &/or litigation if necessary

Coordinate & Complete Additional Trades (gutters, solar)

\*Register Warranty

\*Final Invoice Customer (once claim is settled)

\*Send Customer Crown Roof Warranty

\*Send Thank You Email (mentions referral program again)

Collect Final Check - Upload to Jobnimbus

- Ask for referrals!! Last chance!!

\*Close Out Job

\*Office Duty