ROOFING · CUSTOMER COMMUNICATION OPERATIONS

Customer communication and project updates

Automates customer communications throughout roofing projects by sending targeted updates based on project milestones and capturing visual progress documentation. Improves customer satisfaction and reduces manual communication overhead.

01 WORKFLOW TRIGGER

Project status changes in JobNimbus (scheduled, in progress, materials delivered, completion)

BLUEPRINT OVERVIEW

What this workflow accomplishes

This workflow connects JobNimbus job stages to CompanyCam field photos, Hover measurements, and AccuLynx records so homeowners hear from you at every milestone without a project manager typing the same tear-off update fifteen times. Automation handles data pull, photo selection, message drafting, and multi-channel send. The project manager keeps authority over photo selection, delay language, and any message tied to a change order or completion sign-off.

01

OUTPUTS

Milestone status notifications, Photo progress updates, Communication audit trail, Before and after galleries

02

SUCCESS MEASURES

Homeowner response time, Delivery success rate, Milestone accuracy rate, Opt-out and complaint count

03

CORE SYSTEMS

JobNimbus, AccuLynx, CompanyCam, Hover

HOW TO USE THIS BLUEPRINT

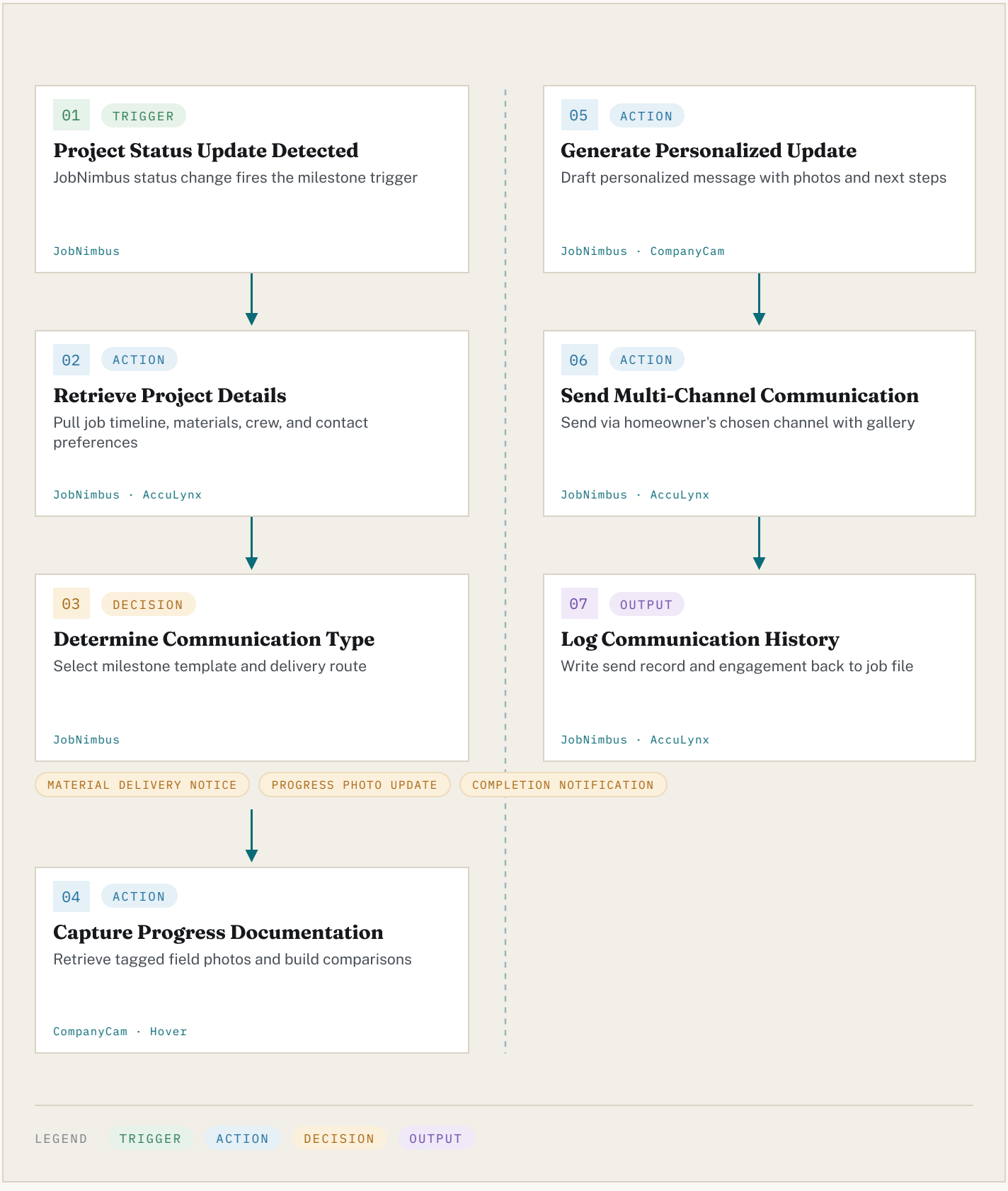
Owners and sales managers: set which job stages warrant a homeowner touch and approve the tone of each template.

Project managers and crew leads: verify CompanyCam photos are tagged to the right job and slope before any gallery goes out.

Implementers: map JobNimbus status values to templates and confirm SMS consent is stored per contact.

End-to-end stage map

Seven stages run from a JobNimbus status change to a logged communication record in the customer file. The decision at stage three governs which milestone template fires and whether photos ride along.



IMPLEMENTATION DETAIL

Stage-by-stage breakdown

Each stage states the operational intent, the human control point, and the systems likely to take part. System names are examples, not a required architecture.

01 TRIGGER

Project Status Update Detected

JobNimbus triggers workflow when project milestone is reached or status changes. System captures current project phase and customer contact information.

CONTROL POINT

The project manager confirms the job stage was moved by the crew lead who was actually on the roof, not by an office edit.

SYSTEMS JobNimbus

02 ACTION

Retrieve Project Details

Pulls complete project information including timeline, materials, crew assignments, and customer preferences. Gathers data needed for personalized communication.

CONTROL POINT

Office coordinator verifies the AccuLynx material record and delivery date match the JobNimbus job before anything is quoted to the homeowner.

SYSTEMS JobNimbus AccuLynx

03 DECISION

Determine Communication Type

Evaluates project status to select appropriate communication template and delivery method. Routes to material delivery updates, progress photos, or completion notifications.

CONTROL POINT

Project manager can override the selected template, most often to swap a routine progress note for a weather delay message.

SYSTEMS JobNimbus

04 ACTION

Capture Progress Documentation

Automatically retrieves latest project photos from field crews and generates before/after comparisons. Creates visual proof of work completion for customer review.

CONTROL POINT

Crew lead or project manager approves the photo set and pulls any shot showing exposed decking, damage findings, or an unsafe staging area.

SYSTEMS CompanyCam Hover

COMPLETION AND MEASUREMENT

Closing stages and results

The final stages send on the homeowner's preferred channel and write the full send history back to the job file for warranty and dispute purposes.

05 ACTION

Generate Personalized Update

Creates customized message with project photos, timeline updates, and next steps. Includes weather delays, material arrivals, or quality inspections as relevant.

CONTROL POINT

Project manager reviews and edits any language about delays, supplements, or added work before the message is released.

SYSTEMS JobNimbus CompanyCam

06 ACTION

Send Multi-Channel Communication

Delivers update via customer's preferred method including SMS, email, or in-app notifications. Includes photo galleries and project timeline visualization.

CONTROL POINT

Office coordinator holds sends for jobs in dispute or pending insurance approval and releases them manually.

SYSTEMS JobNimbus AccuLynx

07 OUTPUT

Log Communication History

Records all sent communications in customer file with delivery confirmations and engagement metrics. Updates customer satisfaction tracking and project documentation.

CONTROL POINT

Office manager reviews failed deliveries weekly and calls those homeowners directly rather than resending.

SYSTEMS JobNimbus AccuLynx

DELIVERABLES

- Milestone status notifications
- Photo progress updates
- Communication audit trail
- Before and after galleries

KEY METRICS

- Homeowner response time
- Delivery success rate
- Milestone accuracy rate
- Opt-out and complaint count

IMPLEMENTATION CHECKS

- SMS consent stored per homeowner
- CompanyCam photo tags match job
- Template approval routing by stage
- Send history written to JobNimbus
- Crew photo permissions restricted

NEXT STEP

Turn this blueprint into an implementation plan.

Map each stage to your own systems, permissions, and approval routing before selecting tools or building automation.

packfoundry.app/assessment

ROOFING WORKFLOW PACKS AND A FREE ASSESSMENT