

Lead qualification and estimate generation

This workflow automatically qualifies roofing leads and generates accurate estimates by capturing property data, assessing project requirements, and creating professional proposals. It reduces manual qualification time and delivers consistent, competitive estimates to homeowners.

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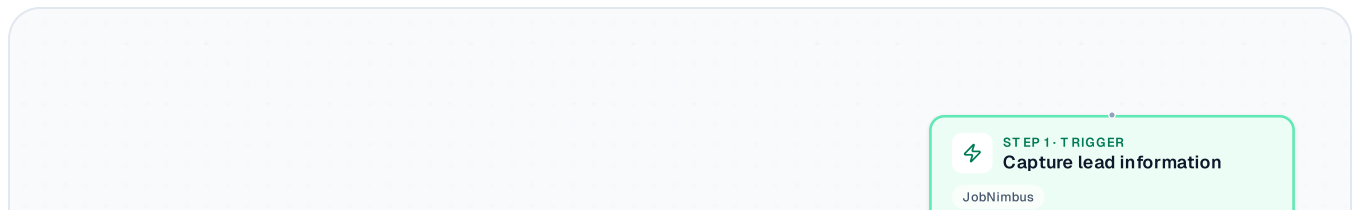


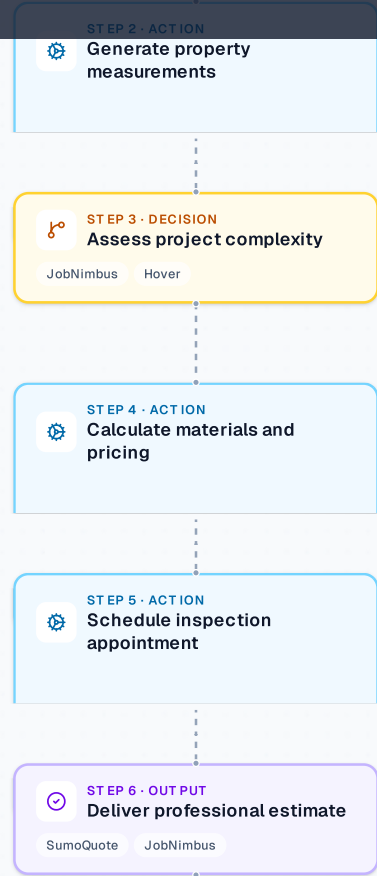
WORKFLOW TRIGGER

New lead submits roofing inquiry through website form or phone call

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Capture lead information

New roofing inquiry is received with homeowner contact details and basic project requirements. Lead data is automatically logged into the CRM

2

 ACTION

Generate property measurements

Automated aerial property analysis captures roof dimensions, pitch angles, and structural details. High-resolution imagery provides accurate measurements for material calculations.

Hover

3

 DECISION

Assess project complexity

System evaluates roof characteristics, damage severity, and accessibility to determine if project requires standard or custom estimation approach. Complex projects are flagged for manual review.

JobNimbus

Hover

4

 ACTION

Calculate materials and pricing

Automated system computes material quantities, labor requirements, and project costs based on roof measurements and local pricing data. Multiple roofing material options are included in calculations.

SumoQuote

5

 ACTION

Schedule inspection appointment

System automatically books inspection slot with qualified lead and sends confirmation details. Appointment details are synced across team calendars.

JobNimbus

AccuLynx

6

OUT PUT

Deliver professional estimate

Comprehensive roofing estimate with material options, pricing, and timeline is automatically generated and sent to homeowner. Follow-up sequence is initiated for proposal review.

SumoQuote

JobNimbus



Outputs

- Detailed roofing estimate with material options
- Scheduled inspection appointment
- Lead qualification score and project assessment



Key Metrics

- Lead-to-estimate conversion rate

- Average estimate generation time

AI Business OS



Tools & Integrations

- JobNimbus
- Hover
- SumoQuote
- AccuLynx

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