

Roofing Call Center Startup Checklist

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1. Market and data

- ☐ Chose one market and documented why (roof age, storm history, permits, owner-occupancy)
- ☐ Purchased owner-occupied, single-family homeowner data with verified phones
- ☐ Do Not Call suppression applied to every campaign load
- ☐ Internal suppression list built (prior customers, prior requests to stop)
- ☐ Attorney reviewed scripts, disclosures, calling hours, and data sources

2. Technology

- ☐ Power dialer provisioned with local caller ID numbers
- ☐ CRM configured with required fields for every appointment record
- ☐ Call recording enabled and storage confirmed
- ☐ SMS confirmations and reminders set up
- ☐ Calendar integration writing into the rep's real calendar
- ☐ Reporting dashboard showing dials, conversations, appointments, show rate

3. Hiring

- ☐ Written role scorecard for the appointment setter position
- ☐ Interview includes a five minute live mock call
- ☐ Compensation plan pays on qualified appointments, not booked ones
- ☐ Hired in pairs so you have comparison and coverage
- ☐ Decided remote or in office based on training maturity

4. Training

- ☐ Five day onboarding plan written and scheduled
- ☐ Roofing terminology sheet and short quiz
- ☐ Top ten objections with one honest response each
- ☐ Daily mock calls in week one
- ☐ Daily 15 minute huddle on the calendar
- ☐ Weekly 30 minute one-on-one per agent on the calendar

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5. Quality assurance

- ☐ Qualification standard written as pass or fail criteria
- ☐ QA scorecard covering tone, qualification, compliance, and disposition
- ☐ Record reviewed before release: address, ownership, concern, time window, expectations
- ☐ Written confirmation sent by text or email on every booking
- ☐ Return path defined for records that fail review

6. Measurement

- ☐ Daily: dials, contacts, conversations, appointments booked
- ☐ Weekly: qualified appointment rate, show rate, QA scores by agent
- ☐ Monthly: cost per qualified appointment, close rate, revenue per agent, turnover
- ☐ Quarterly: market, list source, and technology spend review

7. Launch (first 90 days)

- ☐ Days 1-30: market, data, tools, scripts, SOPs, first two hires
- ☐ Days 31-60: onboarding, live calling, daily coaching, first QA scores
- ☐ Days 61-90: tune script and list sources, fix show rate, then add headcount