

THE ZERO-DRIVE ESTIMATE

Intake Script & Checklist

Purpose: To pre-qualify incoming service requests, eliminate unpaid windshield time, and gather the exact details needed to provide a baseline remote quote.

Instructions: Use this script for every new incoming lead. Do not schedule a truck roll until this checklist is complete and photos are received.

STEP 1: THE STANDARD GREETING

"Thanks for calling. To make sure we get you the most accurate pricing and send the right equipment for the job, I'm going to ask you a few quick questions and then have you snap a couple of photos with your smartphone. Sound good?"

STEP 2: CORE QUALIFICATION QUESTIONS

1. The Photo Request (Do not skip this)

"I'll text you a link in a moment. I need you to reply with three specific photos: One close-up of the actual problem, one taken from about 5 feet back so I can see the whole workspace, and one showing the nearest shutoff valve or access panel."

☐ Customer agreed to send photos.

(Internal Note: Watch for hidden access issues, tight workspaces, or old/degraded piping).

2. The "Handyman" Check

"Just so I know what my guys are walking into—has anyone else tried to fix or patch this yet, including yourself?"

- ☐ Un-touched / Fresh problem.
- ☐ Previous attempt made (Adjust quote for potential rework).

3. The Urgency Filter

"Is this an active leak causing water damage right now, or is this a planned project we can schedule for later this week?"

- ☐ Active Emergency (Dispatch immediately / Premium pricing).
- ☐ Planned Project (Batch into geographic route).

4. The Quality Check (Tire-Kicker Filter)

"Are you looking for a quick patch job just to get by for now, or are you looking for a permanent, code-compliant replacement?"

- ☐ Permanent / Done Right (Ideal client).
- ☐ Quick / Cheap patch (Red flag: likely low-margin/high-headache).

5. The Decision Maker Authorization

"Once I review your photos, I will send over a digital quote. Are you the property owner, and will you be available to review and approve that quote today?"

- ☐ Authorized owner, ready to approve today.
- ☐ Tenant / Other (Requires landlord approval before proceeding).

STEP 3: THE WRAP-UP

"Perfect. I'm texting you right now from our business line. Reply to that text with those three photos. As soon as I review them, I'll shoot you over a baseline estimate so we can get this knocked out for you."

STANDARD DISCLAIMER FOR CUSTOMER ESTIMATES:

NOTICE: ALL REMOTE ESTIMATES ARE BASELINE QUOTES BASED ENTIRELY ON THE PHOTOS AND INFORMATION PROVIDED BY THE CUSTOMER. FINAL PRICING IS SUBJECT TO CHANGE IF HIDDEN DAMAGE, CODE-COMPLIANCE UPGRADES, OR RESTRICTED ACCESS ISSUES ARE DISCOVERED UPON PHYSICAL INSPECTION OF THE PROPERTY.