One Big Media Company

🏠 GOHIGHLEVEL SNAPSHOT · ROOFING CONTRACTORS

Roofing Snapshot: Setup & Walkthrough Guide

Install, configure and launch every workflow, pipeline and form.

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OVERVIEW

What's inside

A done-for-you GoHighLevel system for roofers: instant lead response, inspection booking, estimate follow-up, reviews and a storm-response campaign you can launch the morning after hail.

- 21 pre-built workflows written in roofing language
- Storm Damage Response campaign for the days after hail or high wind
- Sales pipeline with Inspection Booked, Inspection Completed and Estimate Sent stages
- Customer Journey pipeline from Install Scheduled to Referral Partner
- Reactivation pipeline for old inspections and lost estimates
- Free Roof Inspection calendar with confirmation and reminder texts
- Quote request form with Damage Type, Roof Age and Insurance Claim Status questions
- Customer feedback form that routes 4-5 star ratings to Google and 1-3 stars to the owner
- Refer-a-Neighbor form with referral reward tracking
- Roofing custom fields: roof age, material, damage type, claim status, carrier, storm date, stories
- 20 custom values so every message is branded in minutes
- Annual roof checkup and pre-winter inspection campaigns
- Step-by-step setup guide and 6-lesson visual mini-course outline

Pipelines

Sales Pipeline

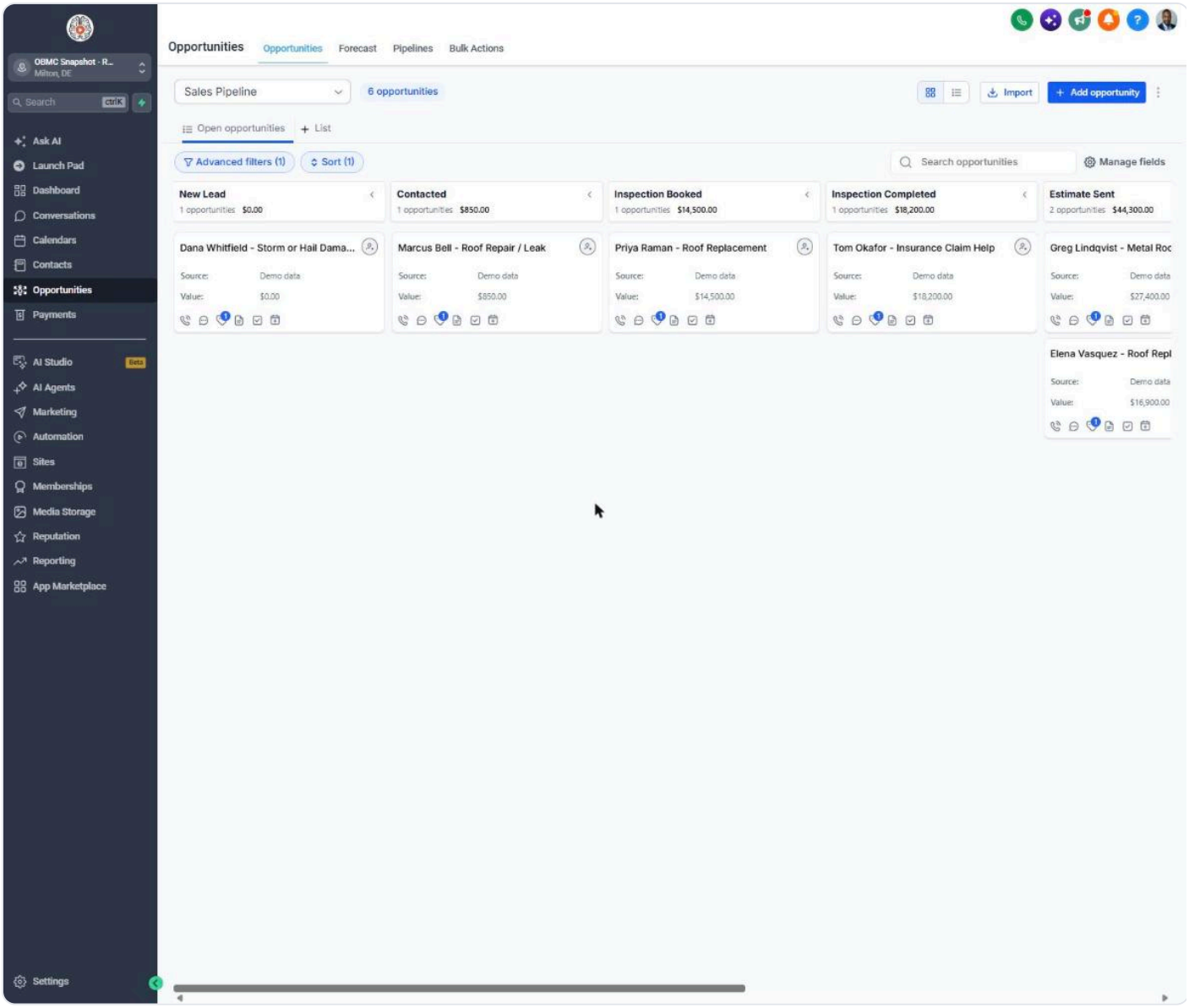
New Lead | Contacted | Inspection Booked | Inspection Completed | Estimate Sent | Won | Lost | Long-Term Nurture

Customer Journey

Install Scheduled | Install In Progress | Job Completed | Feedback Requested | 5-Star Reviewed | Referral Partner

Reactivation

Campaign Sent | Replied - Interested | Booked | Not Interested


OBMC Snapshot - R...
Milton, DE
Search
ctrlK
Ask AI
Launch Pad
Dashboard
Conversations
Calendars
Contacts
Opportunities
Payments
AI Studio
Beta
AI Agents
Marketing
Automation
Sites
Memberships
Media Storage
Reputation
Reporting
App Marketplace
Settings
Opportunities
Opportunities
Forecast
Pipelines
Bulk Actions
Sales Pipeline
6 opportunities
Import
Add opportunity
Open opportunities
List
Advanced filters (1)
Sort (1)
Search opportunities
Manage fields
New Lead
1 opportunities $0.00
Contacted
1 opportunities $850.00
Inspection Booked
1 opportunities $14,500.00
Inspection Completed
1 opportunities $18,200.00
Estimate Sent
2 opportunities $44,300.00
Dana Whitfield - Storm or Hail Dama...
Source: Demo data
Value: $0.00
Marcus Bell - Roof Repair / Leak
Source: Demo data
Value: $850.00
Priya Raman - Roof Replacement
Source: Demo data
Value: $14,500.00
Tom Okafor - Insurance Claim Help
Source: Demo data
Value: $18,200.00
Greg Lindqvist - Metal Roc
Source: Demo data
Value: $27,400.00
Elena Vasquez - Roof Repl
Source: Demo data
Value: $16,900.00

INSTALL

12-step setup checklist

1. **Load the snapshot**
   In your agency view, go to Sub-Accounts, open the account's menu and choose Load Snapshot, or select this snapshot when creating a new sub-account. Choose to import everything. Then switch into the sub-account.

2. **Fill in the business profile**
   Go to Settings > Business Profile and enter the legal business name, address, phone, website and time zone. The time zone controls when texts send and when inspections show on the calendar.

3. **Set your custom values**
   Go to Settings > Custom Values and fill in business name, owner name, phone, service area, booking link, review link, feedback link and referral link. Adjust the roofing offers (lead offer, reactivation, seasonal, referral reward) to what the roofer will actually honor.

4. **Connect a phone number and register A2P**
   Go to Settings > Phone Numbers to buy or port a number, then complete A2P 10DLC brand and campaign registration in the Trust Center. Workflows can be built while you wait, but don't run the reactivation or storm campaigns until approval comes through.

5. **Set up email sending**
   Go to Settings > Email Services and add a dedicated sending domain (for example mail.roofingcompany.com). Add the DNS records it gives you and verify. This keeps estimate follow-ups out of spam.

6. **Configure the Free Roof Inspection calendar**
   Go to Calendars > Calendar Settings and open Free Roof Inspection. Assign the inspector or sales rep, set availability, inspection length and buffer time for drive time between homes, and copy the booking link into the booking_link custom value.

7. **Customize the quote form**
   Go to Sites > Forms > Builder and open Request a Quote. Confirm the Damage Type, Roof Age and Insurance Claim Status questions, add the TCPA consent checkbox, and embed the form on the website or connect it to Facebook lead ads.

8. **Connect Google Business Profile and reviews**
   Go to Settings > Integrations and connect Google Business Profile. Then go to Reputation > Settings, copy the Google review link, and paste it into the review_link custom value.

9. **Rename pipeline stages if needed**
   Go to Opportunities > Pipelines and confirm the Sales Pipeline stages read Inspection Booked, Inspection Completed and Estimate Sent. Adjust the Customer Journey stage names if the roofer uses different install milestones.

10 **Assign users and notifications**
Go to Settings > My Staff and add the owner, office staff and sales reps with their mobile numbers. Then open the alert steps in workflows 01, 02, 03 and 13 under Automation > Workflows and point them at the right people.

11 **Publish the workflows**
Go to Automation > Workflows, open each workflow, review the copy, and switch it from Draft to Publish. Leave 14 (Reactivation), 20 (Seasonal) and 21 (Storm Damage Response) in draft until you're ready to launch them on purpose.

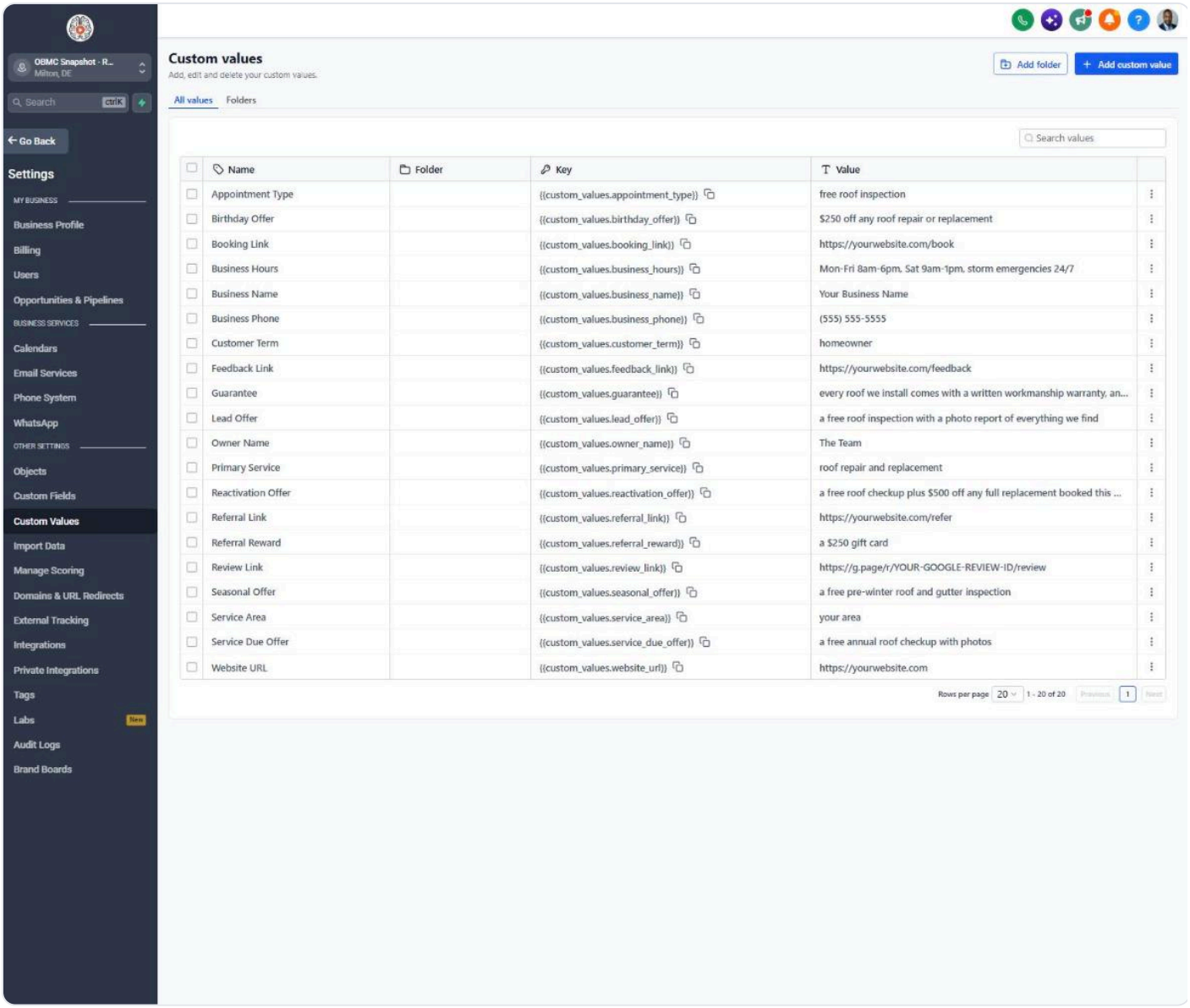
12 **Go live test**
Submit the quote form with your own phone and email, book an inspection, call the number and hang up, and reply to a text. Confirm every SMS, email and team alert fires, then delete the test contact from Contacts.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Roofing default / what to enter
Business Name	Your business name
Business Phone	Your business phone
Owner Name	Your owner name
Website URL	Your website url
Booking Link	Your booking link
Review Link	Your review link
Feedback Link	Your feedback link
Referral Link	Your referral link
Service Area	Your service area
Customer Term	homeowner
Appointment Type	free roof inspection
Primary Service	roof repair and replacement
Lead Offer	a free roof inspection with a photo report of everything we find
Guarantee	every roof we install comes with a written workmanship warranty, and we leave your property cleaner than we found it
Referral Reward	a $250 gift card
Reactivation Offer	a free roof checkup plus $500 off any full replacement booked this month
Seasonal Offer	a free pre-winter roof and gutter inspection
Service Due Offer	a free annual roof checkup with photos
Birthday Offer	$250 off any roof repair or replacement
Business Hours	Mon-Fri 8am-6pm, Sat 9am-1pm, storm emergencies 24/7


OBMC Snapshot - R...
Milton, DE
Search
ctrlK
Go Back
Settings
MY BUSINESS
Business Profile
Billing
Users
Opportunities & Pipelines
BUSINESS SERVICES
Calendars
Email Services
Phone System
WhatsApp
OTHER SETTINGS
Objects
Custom Fields
Custom Values
Import Data
Manage Scoring
Domains & URL Redirects
External Tracking
Integrations
Private Integrations
Tags
Labs
New
Audit Logs
Brand Boards
Custom values
Add, edit and delete your custom values.
Add folder
Add custom value
All values
Folders
Search values
Name
Folder
Key
Value
Appointment Type {{custom_values.appointment_type}} free roof inspection
Birthday Offer {{custom_values.birthday_offer}} $250 off any roof repair or replacement
Booking Link {{custom_values.booking_link}} https://yourwebsite.com/book
Business Hours {{custom_values.business_hours}} Mon-Fri 8am-6pm, Sat 9am-1pm, storm emergencies 24/7
Business Name {{custom_values.business_name}} Your Business Name
Business Phone {{custom_values.business_phone}} (555) 555-5555
Customer Term {{custom_values.customer_term}} homeowner
Feedback Link {{custom_values.feedback_link}} https://yourwebsite.com/feedback
Guarantee {{custom_values.guarantee}} every roof we install comes with a written workmanship warranty, an...
Lead Offer {{custom_values.lead_offer}} a free roof inspection with a photo report of everything we find
Owner Name {{custom_values.owner_name}} The Team
Primary Service {{custom_values.primary_service}} roof repair and replacement
Reactivation Offer {{custom_values.reactivation_offer}} a free roof checkup plus $500 off any full replacement booked this ...
Referral Link {{custom_values.referral_link}} https://yourwebsite.com/refer
Referral Reward {{custom_values.referral_reward}} a $250 gift card
Review Link {{custom_values.review_link}} https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer {{custom_values.seasonal_offer}} a free pre-winter roof and gutter inspection
Service Area {{custom_values.service_area}} your area
Service Due Offer {{custom_values.service_due_offer}} a free annual roof checkup with photos
Website URL {{custom_values.website_url}} https://yourwebsite.com
Rows per page 20
1 - 20 of 20
Previous
1
Next

WALKTHROUGH

All 21 workflows

01 · New Lead → Speed-to-Lead + 7-Day Follow-Up

TRIGGER Form 01 submitted, or tag 'start lead nurture' added

STEPS Tag new lead → Create opportunity in Sales Pipeline → New Lead → Instant SMS reply with booking link → Instant email: what happens next → Text + email alert to the team → Day 1 SMS follow-up → Day 2 email: why customers choose you → Day 4 SMS: quick question → Day 7 email: close the loop → Move to Long-Term Nurture

Stops when the lead replies

> Hi **first name**, it's **owner name** with **business name**. Got your request. I can get you **lead offer**. What's a good time to swing by this week? Or grab a slot: **booking link** Reply STOP to opt out.

02 · Missed Call → Instant Text-Back

TRIGGER Inbound call is busy, no-answer or voicemail

STEPS Text-back within seconds → Create opportunity → New Lead (source: missed call) → Text alert to the team

Runs every time

> Hi, this is **business name**. Sorry we missed your call, we're likely up on a roof. How can we help? If it's a leak or storm damage, reply with your address and we'll call right back. Reply STOP to opt out.

03 · Customer Replied → Hot Lead Alert

TRIGGER Customer replies (SMS, email, chat)

STEPS Tag hot lead → Text the team the reply so nobody waits

Runs every time

04 · Appointment Booked → Confirm + Reminders

TRIGGER Customer books on the calendar

STEPS Tag appointment booked → Move deal → Appointment Booked → Confirmation SMS + email with reschedule link → Team alert → 24-hour reminder SMS → 2-hour reminder SMS

Runs for every booking

> You're booked, **first name**! Your free roof inspection with **business name** is set for **start time**. You don't need to be on the roof, just make sure we can reach the side yard. Reschedule: **reschedule link**

05 · No-Show → Reschedule Recovery

TRIGGER Appointment status changes to No-show

STEPS Tag no-show → Sorry-we-missed-you SMS + email with booking link → Team alert → Day 1 rebook SMS → Day 3 final SMS

Stops when they reply

> Hi **first name**, sorry we missed you today for your roof inspection. No worries. We don't need you on the roof, so we can often inspect while you're at work. Want a new time? **booking link**

06 · Appointment Completed → Proposal Prep

TRIGGER Appointment status changes to Showed

STEPS Move deal → Appointment Completed → Thank-you SMS → Team alert: send the proposal within 24 hours

Runs every time

07 · Proposal Sent → Follow-Up Sequence

TRIGGER Deal moves to Proposal Sent

STEPS Day 1 SMS check-in → Day 3 email: questions? → Day 6 SMS: hold your spot → Day 13 final email → Team alert if still no answer

Stops when they reply

> Hi **first name**, did you get a chance to look over your roofing estimate from **business name**? Happy to walk you through the options, materials or colors by phone.

08 · Deal Won → Welcome + Customer Journey

TRIGGER Deal moves to Won

STEPS Tag customer, remove lead tags → Create Customer Journey deal → Scheduled → Welcome SMS → Welcome email: what happens next → Team alert

Runs every time

> Welcome to **business name**, **first name**! Thanks for trusting us with your roof. We'll be in touch shortly to confirm your install date and material delivery. Save this number, it's our direct line.

09 · Deal Lost → 30/60/90-Day Nurture

TRIGGER Deal moves to Lost

STEPS Tag lost → Day 30 check-in email → Day 60 SMS → Day 90 email with comeback offer → Move to Long-Term Nurture

Stops when they reply

10 · Job Completed → Feedback Request

TRIGGER Customer Journey deal moves to Completed

STEPS Move → Feedback Requested → Tag review requested → SMS + email asking for a private rating → Day 2 reminder SMS

Runs every time

Hi **first name**, thanks for choosing **business name** for your new roof! How did the crew do? It takes 20 seconds: **feedback link**

11 · Feedback Submitted → Review Ask or Service Recovery

TRIGGER Form 02 submitted

STEPS If rating is 4-5: tag promoter, send Google review link, move → 5-Star Reviewed → If rating is 1-3: tag detractor, apology message, urgent team alert to fix it privately

Runs every time

12 · Happy Customer → Referral Request

TRIGGER Tag promoter added

STEPS Wait 3 days → Referral SMS with reward → Referral email with reward

Once per contact

Hi **first name**, thanks again for the kind words! If a neighbor or friend needs a roof inspection, send them our way and we'll thank you with **referral reward**: **referral link**

13 · Referral Received → Thank You + Team Alert

TRIGGER Form 03 submitted

STEPS Move referrer → Referral Partner → Tag referral partner → Thank-you SMS → Team alert with the friend's name and phone

Runs every time

14 · Database Reactivation Campaign

TRIGGER Tag 'start reactivation' added (bulk-tag an imported list)

STEPS Create Reactivation deal → Campaign Sent → SMS 1: still looking for help? → Day 2 SMS: past-customer offer → Day 5 email offer → Day 10 last-call SMS → Remove the campaign tag

Stops when they reply

Hi **first name**, it's **owner name** from **business name**. We looked at your roof a while back. Is it still holding up, or has anything changed since? Reply STOP to opt out.

15 · Invoice Sent → Payment Reminders
TRIGGER Invoice sent
STEPS Wait 3 days → Friendly SMS reminder → Day 6 email reminder → Day 10 team alert for a personal call
Payments workflow (16) stops it when the invoice is paid

16 · Payment Received → Thank You
TRIGGER Payment received
STEPS Tag customer, remove past-due tag → Thank-you SMS → Team alert
Runs every time

17 · Birthday → Gift Offer
TRIGGER Contact's birthday (date of birth on file)
STEPS Birthday SMS with gift offer → Birthday email
Yearly

18 · Stale Deal Alert (7 Days No Movement)
TRIGGER Sales Pipeline deal idle 7+ days
STEPS Text + email alert to the team
Runs every time

19 · Service Due → Rebook Reminder
TRIGGER Tag 'service due' added
STEPS Service-due SMS with offer → Day 3 email → Day 7 final SMS → Remove the tag
Stops when they reply

Hi **first name**, it's **business name**. It's been about a year since we worked on your roof. Time for **service due offer** to catch small issues early. Book here: **booking link** Reply STOP to opt out.

20 · Seasonal Promo Campaign
TRIGGER Tag 'seasonal promo' added
STEPS Offer SMS → Day 2 email → Day 5 last-call SMS → Remove the tag
Stops when they reply

Hi **first name**, **business name** here. Before winter hits, we're offering **seasonal offer** for homes in **service area**. Want a spot? Reply YES or book: **booking link** Reply STOP to opt out.

21 · Storm Damage Response

TRIGGER Tag 'niche campaign' added

STEPS Niche SMS → Day 2 email → Day 5 follow-up SMS → Remove the tag

Stops when they reply

Hi **first name**, it's **business name**. A storm just moved through **service area** and we're getting calls about hail and wind damage. Want a free inspection to see if your roof was hit? Reply YES. Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to lead	First contact within 5 minutes of every new lead	Contacts > contact record activity timeline, or Conversations
Lead to inspection rate	Steadily increase the share of leads that book an inspection month over month	Opportunities > Pipelines > Sales Pipeline (New Lead vs Inspection Booked counts)
Inspection show rate	Aim for 85% or more of booked inspections completed	Calendars > Appointments list (Showed vs No-Show)
Estimate close rate	Track every month and push to improve it with consistent follow-up	Opportunities > Pipelines (Estimate Sent vs Won) and Dashboard
New Google reviews	At least one new review for every few completed jobs	Reputation > Overview
Stale deals	Zero deals sitting more than 7 days without a next step	Opportunities > Pipelines filtered by last stage change, plus workflow 18 alerts

Compliance notes

- Get written consent before texting. Keep the TCPA consent checkbox on every form, and only add purchased or door-knock lists to SMS campaigns if those contacts gave consent.
- Complete A2P 10DLC registration before sending campaigns, and describe storm and reactivation messages accurately in the campaign use case.
- Many states prohibit contractors from negotiating insurance claims on a homeowner's behalf (that's a licensed public adjuster's job). Keep copy to inspecting, documenting and explaining, not 'we'll handle your claim.'
- Never advertise covering, waiving or rebating the homeowner's insurance deductible. It's illegal in several states, including Texas, and can be treated as insurance fraud.
- Check local rules on post-storm solicitation, door-to-door permits and contractor registration before launching a storm campaign in a new city.

Mini-course outline

1. **Install the snapshot and brand it for a roofer**: Load the snapshot into a sub-account and make every message sound like the roofer's own company.
2. **Lead capture and speed-to-lead**: Make sure every roofing lead from the website, ads or phone gets an instant response.
3. **Inspection booking and no-show recovery**: Fill the inspection calendar and keep reps from driving to empty driveways.

4. **Sales pipeline and estimate follow-up**: Move every roofing deal from inspection to signed contract without anything slipping.
5. **Reviews, referrals and reactivation**: Turn finished roofs into Google reviews, neighbor referrals and repeat work.
6. **Launch and run the storm playbook**: Go live and be ready to launch Storm Damage Response within hours of the next storm.

General guidance only. This is not legal, tax, medical or financial advice. Results depend on your offer, market and execution.