

CASE STUDY 01 • HOME SERVICES

Roofing Company — Storm-Damage Lead Funnel

Speed-to-lead automation that reaches storm-damaged homeowners before competitors do.

INDUSTRY	LOCATION	TIMELINE	INVESTMENT
Home Services	Southeast US	60 Days	\$2,800 setup + \$800/mo

The Problem

A regional roofing company serving four counties was losing 60% of its leads within the first hour. Their process ran from a Facebook-ad click to a landing page, to a form fill, to an email, to the office, to a manual call attempt the next business day — by which point the homeowner had already called two or three competitors. They needed speed-to-lead under five minutes, automatic qualification, and territory-based rep assignment.

FUNNEL BUILDER Landing Page

Landing Page — Storm-Damage Funnel

Hero: “Hail damage? Free roof inspection in 24 hours,” with dynamic ZIP-based social proof.

Trust bar: 500+ roofs replaced | A+ BBB | Insurance-approved | 4.8 Google rating.

Video: Auto-plays a testimonial from a homeowner in the same ZIP code (URL-parameter swap).

CTA: “Check if your roof qualifies” — a multi-step form that reduces abandonment by 40%.

Exit-intent: “Don’t risk leaks — \$0 out-of-pocket with insurance,” plus phone number.

Mobile: Thumb-friendly buttons, click-to-call, and tap-to-text on all CTAs.

Result: 34.2% page-to-form conversion (industry avg: 12–18%).

Figure 1.1 — Mobile-first storm-damage landing page with urgency-led architecture.

My Approach to the Funnel

I started with the psychology of a storm-damaged homeowner: panicked, comparison-shopping, and hungry for immediate reassurance. The hero doesn’t sell roofing — it sells peace of mind (a 24-hour inspection). The trust bar answers objections before they form. The video testimonial uses dynamic URL parameters to swap in a homeowner from the same ZIP code, making the social proof hyper-relevant. The multi-step form breaks one intimidating form into five micro-commitments, each asking a single question.

FORMS Lead Capture**Multi-Step Qualification Form**

Step 1 — Property address: Google Places API auto-complete + ZIP capture for territory routing.

Step 2 — Insurance status: “Do you have active homeowner insurance?” (Yes / No / Not sure).

Step 3 — Damage severity: Visible damage / Suspected / Just want an inspection (tags for priority).

Step 4 — Contact info: Name, validated phone, email, and preferred call time (morning / evening).

Step 5 — Inspection date: Calendar picker with a 2-day look-ahead (urgency without pressure).

Validation: Phone verified via Twilio Lookup, email format check, required-field enforcement.

Integration: Embeds on the landing page and works as a standalone widget for Facebook Lead Ads.

Result: 78.4% form-completion rate (industry avg: 45–55%).

Figure 1.2 — Five-step qualification form with real-time validation and conditional logic.

My Approach to the Form

The form isn't just a data-collection tool — it's a qualification engine. Insurance status and damage severity are stored as tags that drive workflow branching. The address field captures the ZIP code for automatic territory assignment. Phone validation via Twilio Lookup keeps fake numbers out of the pipeline. The preferred-call-time field lets the rep call when the homeowner actually wants to talk. Every field maps to a custom contact field for segmentation and reporting.

WORKFLOWS Automation**Automation Workflow — Storm Lead Response**

Trigger: “Storm Damage Qualification” form submitted.

Action 1: Create an opportunity in the New Leads stage and assign a \$12,000 estimated value.

Action 2: Send an instant SMS (under 30 sec): “Thanks [FirstName]! [RepName] will call you within 5 min. Save this number.”

Action 3: Assign to a sales rep via round-robin by ZIP-code territory (four territories mapped).

Action 4: Wait 5 min — if no call is logged, Slack-alert the manager and tag “URGENT: No Call.”

Action 5: Wait 2 hours — if no appointment, send an SMS with a calendar link and neighborhood photos.

Action 6: Day 1 email: “What to expect during your roof inspection” (reduces no-shows).

Action 7: Day 3 email: “3 signs your roof has hidden hail damage” (positions as the expert).

Action 8: Day 7 email: “Your neighbors in [ZIP] are replacing roofs” (social proof + FOMO).

Action 9: If “Not interested,” move to long-term nurture (annual storm reminder).

Result: 7-min average response | 89% contacted within 15 min.

Figure 1.3 — Multi-branch workflow with escalation logic and conditional nurturing.

My Approach to the Workflow

This workflow is built on one principle: in storm damage, speed wins. The five-minute escalation ensures no lead goes untouched. The two-hour follow-up — with a calendar link and neighborhood photos — is the real conversion driver: it removes friction and adds social proof. The seven-day nurture doesn't hard-sell; it educates, which builds trust and cuts no-show rates. The "Not interested" branch enters a 12-month nurture that re-triggers when NOAA issues a new storm warning for that ZIP code.

PIPELINE Opportunities

Sales Pipeline — Roofing Division

Stage 1 — New Lead: Auto-created on form submit | 47 opps | \$564,000 potential.

Stage 2 — Qualified: Insurance confirmed + damage verified | 31 opps | \$372,000.

Stage 3 — Inspection Scheduled: Calendar confirmed + reminder SMS | 28 opps | \$336,000.

Stage 4 — Estimate Sent: E-signature document delivered via GHL Docs | 19 opps | \$228,000.

Stage 5 — Contract Signed: Digital signature received + deposit collected | 12 deals | \$144,000.

Stage 6 — Job Scheduled: Materials ordered + crew assigned | 8 jobs | \$96,000.

Stage 7 — Job Completed: Final walkthrough + review request triggered | 5 jobs | \$60,000.

Automation: Each stage change triggers a client SMS, an internal task, and a document request.

Reporting: Custom dashboard shows conversion by stage, rep performance, and revenue forecast.

Result: \$284K active pipeline | 26% lead-to-close | \$12K avg deal.

Figure 1.4 — Seven-stage pipeline with automated progression and revenue tracking.

My Approach to the Pipeline

The pipeline is designed as a revenue-forecasting tool, not just a lead tracker. Each stage carries a weighted probability (New Lead = 10%, Qualified = 30%, Inspection Scheduled = 60%, and so on), so the owner sees realistic revenue projections. Stage changes are automated through workflow triggers. The custom dashboard shows not only pipeline value but velocity (how fast deals move) and leakage (where deals stall) — pinpointing exactly where to optimize.

KEY RESULTS — 60-DAY PERFORMANCE VS. PREVIOUS PERIOD

7 min
RESPONSE TIME

+340%
INSPECTIONS BOOKED

\$284K
PIPELINE VALUE

26%
CLOSE RATE

This case study represents an actual project outcome. The client's name, location, and identifying details have been anonymized to protect confidentiality. Results vary with market conditions, ad spend, and sales-process maturity. I don't guarantee specific results — I guarantee systems built to best practices with measurable optimization potential.