

A sample roofing quote recovery audit, made concrete.

This generic example shows how Arbor would organize a contractor's estimate handoff, a 14-day email-only follow-up sequence, stop rules, and measurement fields before any approved workflow is configured.

No client work or results are represented here.

This is an original, illustrative sample. It describes no real contractor, customer list, engagement, campaign, reply, accepted job, revenue, payment, or performance result. Every placeholder observation must be replaced by client-confirmed facts during an actual audit.

What the sample contains

- **Evidence boundary:** public observations stay separate from owner-confirmed internal facts.
- **Decision map:** six stages from estimate approval through separately verified outcome.
- **Email-only cadence:** six purposes across 14 days, with reply, opt-out, suppression, and decision stops.
- **Measurement specification:** ownership, delivery, eligibility, reply, acceptance, loss, and payment evidence remain distinct.
- **Exact pilot:** one documented workflow, approved templates, tracker, handoff plan, configuration guide, and 14-day measurement review.

\$350

One-time founding pilot. Advertising and platform fees are not included.

The pilot does not guarantee replies, accepted jobs, revenue, payment, contribution, or profit.

Production reference: www.arborbranddevelopment.com/sample-roofing-quote-recovery-audit/

Two evidence lanes, then a six-stage decision map.

Public visibility can suggest questions. It cannot prove what happens inside a business. Internal claims remain unknown until an authorized owner confirms them.

PUBLIC OBSERVATIONS	CLIENT-CONFIRMED FACTS
Visible estimate-request path; published services, service area, hours, financing, warranty, and stated next steps.	Delivery method and owner; approved email basis; reply, opt-out, suppression, and open-decision state; authoritative acceptance and payment records.
Boundary: a public gap is a question, not proof of internal failure.	Boundary: use an owner interview or approved aggregate export; no customer data belongs in the public request form.

Estimate-to-decision map

1 Estimate approved	Complete scope, intended recipient, delivery channel, and one accountable owner. Gate: no incomplete or unapproved estimate.
2 Delivery recorded	Record actual delivery and any failure. Gate: a created estimate is not a delivered estimate.
3 Eligibility checked	Verify approved email basis, suppression, opt-out, reply, and service-issue status. Gate: any active stop means no scheduled email.
4 Email-only sequence	Schedule only approved drafts inside one supported workflow. Gate: stop immediately on reply or opt-out.
5 Human handoff	A person handles questions, changes, objections, acceptance, and disqualification. Gate: automation never negotiates or infers an outcome.
6 Outcome verified	Keep open, accepted, lost, no decision, invoiced, collected, and verified payment separate. Gate: a reply or accepted estimate is not revenue.

A 14-day, email-only sequence with human stops.

These are sample purposes, not messages for automatic use. Final copy, timing, eligibility, identity, and legal requirements must be approved by the business.

DAY	PURPOSE	HUMAN NEXT STEP	REQUIRED CONTROL
0	Confirm delivery and make the next step clear.	Resolve failure or record confirmation.	Only after approved estimate delivery.
2	Invite questions about scope, timing, or decision process.	Route every reply to the assigned owner.	Stop on any reply.
5	Ask whether a specific blocker is preventing a decision.	Answer or escalate; never manufacture urgency.	Recheck opt-out and suppression.
8	Clarify scheduling or an approved fact-supported option.	Confirm any change with the estimator.	Never invent availability, savings, or scarcity.
11	Offer continue, revisit later, or close the loop.	Record the stated next action and date.	Acceptance, loss, or disqualification stops.
14	Respectfully close while leaving a human contact path.	Record no decision unless another outcome is stated.	Include and honor the approved opt-out.

Universal stop rule

Before every scheduled email, check for reply, opt-out, suppression, acceptance, recorded loss, disqualification, delivery problem, or missing approved sending basis. If any stop exists, cancel the remaining emails and hand the record to its human owner.

Measurement fields that preserve the evidence chain

estimate_id Neutral internal reference.	estimate_delivered_at Actual delivery, not creation.
email_basis_recorded Approved sending basis.	owner + current_status Accountability and controlled state.
last_email_at + next_action_at What occurred and what is planned.	reply_at + opt_out_at Independent stop events.
accepted_at + accepted_job_value Approved work, not payment.	verified_payment_at + collected_amount Authoritative payment evidence.
loss_reason + evidence_source Known reason and supporting system.	message_version + send_event_id Approved copy and delivery trace.

What the exact \$350 pilot delivers.

INCLUDED

- Current estimate and follow-up workflow audit.
- Trade-specific 14-day email-only message sequence.
- Stop-on-reply, opt-out, suppression, and human-handoff rules.
- Quote-status and outcome tracker.
- Configuration guide for one supported workflow.
- 14-day measurement review.

DELIVERY BOUNDARIES

- The audit does not contact homeowners or send messages.
- The business approves copy, authorization, tools, and sending rules before implementation.
- SMS, paid ads, new lead generation, CRM migration, platform fees, and ad spend are not included.
- No reply, accepted-job, revenue, payment, contribution, or profit outcome is promised.

Delivery guarantee

If Arbor does not provide the documented workflow, templates, tracker, and handoff plan within the agreed delivery window after receiving the required information, the pilot fee is refunded.

\$350

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Request the Quote Recovery Audit first.

Use the secure consented request form and submit only public business details and aggregate estimate volume. Do not include homeowner names, addresses, emails, phone numbers, claim details, or estimate documents.

www.arborbranddevelopment.com/?source=sample_roofing_quote_recovery_audit#audit

Audit requests are reviewed during U.S. Eastern business hours. The public request does not authorize customer contact or message sending.

Evidence boundary

This PDF demonstrates deliverable structure only. It does not prove traffic, reading, a form submission, a lead, a reply, an accepted job, a payment, revenue, profit, causation, search indexing, or ranking.