



## A quiet estimate is a question, not an answer

Use public permit evidence to inform a sales review. Keep the source, date and limits next to every conclusion.

### 1 - A LATER SUPPORTED PERMIT

Check whether the property, work type and date actually match the question. Record the permit date, status, contractor field and official source. A permit is useful evidence; it does not by itself prove a completed job, the final customer decision or the contractor's revenue. Next action: review the original opportunity and update its status with the evidence attached. Decide whether the appropriate conversation is about a changed project, future work or closing the file.

### 2 - NO MATCHING RECORD IN THE CHECKED SOURCES

State exactly which issuing authority, date window and work types were checked. Do not turn an unmatched search into 'still needs a roof.' It may reflect source limits, a different authority, unpermitted work or a record that has not appeared. Next action: if a normal follow-up is appropriate, ask where the original project stands. For example: "We are reviewing the estimate we prepared for you. Is that work still under consideration, or should we close the file?"

### 3 - COVERAGE OR IDENTITY IS UNRESOLVED

Keep the item in review. An ambiguous address, unsupported issuer or conflicting contractor identity cannot become a confident result through guesswork. Say what is missing and whether there is a practical next check. Next action: assign one source or address check to the review owner. Keep the item out of a confident sales queue until that check resolves it.

### THE SALES MEETING QUESTION

What would this evidence change about the next conversation? Review the original estimate and CRM status before contacting anyone. The result should support a thoughtful action, not an automated assumption about the homeowner.



**WHO GOT THE ROOF**

ESTIMATE FILE INTELLIGENCE

# Prepare a useful file without sharing unnecessary personal data

Start with a small fit check. Confirm coverage and interpretation before accepting a paid review.

## PREPARE THE MINIMUM USEFUL COLUMNS

Internal estimate or lead ID; property address; estimate date; and the status needed to understand your question. Keep a copy of the original file and its total row count. Do not include homeowner names, phone numbers or email addresses.

## CHECK THE ISSUING AREA

Postal city and ZIP code do not always identify the permitting authority. A county source may exclude permits issued by its cities. Ask which exact authorities and dates are supported for your addresses.

## EXPECT A RECONCILED RESULT

Every accepted row should return a supported finding or a clear exception. The result count should match the accepted input count. Require official source links and an explanation of how dates and identities were matched.

## SEPARATE EVIDENCE FROM VALUE

A declared permit value is not recovered revenue. A callback is not a closed job. If the review changes a sales action, record what happened and what you can substantiate before assigning a dollar return.

## CHOOSE THE NEXT STEP

Request a file-fit check through the service that supplied this guide before sending private records or committing to a scope. Ask to see a privacy-masked sample with the source and limits attached. This guide explains the method; it is not a claim of a result for any particular property or customer.