

STANDARD OPERATING PROCEDURE

First Responder

Lead Handling & Sale Process — Water Mitigation

Document Owner	Operations
Applies To	First Responders / On-Call Technicians
Effective Date	_____
Revision	1.0

Purpose

This SOP defines the end-to-end process a First Responder follows from arrival on site through departure: customer introduction, damage assessment, policy review and claim filing, contract execution, equipment setup, documentation, scheduling, and handoff to dispatch. Following every step on every job protects the customer experience, the claim file, and the company's ability to get paid.

NON-NEGOTIABLE: The contract must be signed, equipment must be set, and the dispatch text plus walkthrough video must be sent BEFORE leaving the job site.

Phase 1 — Arrive on Site & Introduce Yourself

First impressions set the tone for the entire job. Park considerately, be presentable, and greet the customer with confidence.

"Hi, I'm [Name] with [Company Name] — heard you have some water damage."

"Well, show me what happened."

Let the customer walk you to the loss and tell their story. Listen, acknowledge, and follow them to the areas of concern.

Phase 2 — Basic Assessment

Look at the areas of concern. If the water damage is obvious, validate the problem and move directly into the insurance conversation:

"Oh wow — yep, you have quite an issue. I imagine you want to get this taken care of right away. Who is your homeowners insurance?"

"Do you have a copy of your policy?"

"Ok, go grab it and let's get some paperwork out of the way."

During this walkthrough, mentally note the rooms affected — you will use this to build the estimate in Phase 4.

Phase 3 — Review Policy & File the Claim

Review the insurance policy information provided by the homeowner before filing:

1. Confirm the policy is ACTIVE by reviewing the policy dates.
2. Confirm there is sufficient coverage for the loss.
3. Check the declarations page for any exclusions or endorsements that would prevent coverage.

Once the policy checks out, take your phone, dial the insurance company's claims number, and call ON SPEAKERPHONE with the customer present. When the rep answers:

"Hi, this is [Your Name] with [Company Name]. I'm here with your insured, [Customer Name], looking to file a claim for water damage, and I have them here with me on speakerphone."

- File the claim with a generic description of the damages and cause.
- Obtain the claim number and record it before ending the call.

Phase 4 — Get Some Paperwork Out of the Way (Estimate & Contract)

4.1 Build the Estimate in Axiom

Using the rooms affected from your basic assessment, prepare the estimate in Axiom. Every one-room estimate includes, at minimum:

Line Item	Minimum Quantity
Initial Service Call	1 per job
Stabilization EQ	1 per job
EQ Setup / Takedown	1 per job
EQ Decon	1 per job
Labor Per Room	1 per affected room requiring demo
Drying EQ – Small	1 per affected room
Prep / Containment	1 per affected room
Prep / Containment – Pathways & Hallways	1 per job
PPE & Consumables	1 per job
Final Service Call	1 per job
Debris Disposal	1 per job

Minimum contract price: \$8,640.40

Then, in Axiom:

1. Enter the current day as the Start Date.
2. Set the Completion Date for 15 days after the Start Date.
3. Enter the estimate amount in the Contract Price field.
4. Enter 0 in the Deposit Amount field.
5. Click Save.

4.2 Generate & Execute the Contract

- Go to the Contracts tab, click Generate From Template, and choose Contract.
- Sign in person, or send for signature if the customer is not present.
- Mark the rooms we will be working in.
- Verify the Start Date, Completion Date, Contract Price, Deposit, and Due at Completion amounts are on the contract, and that all customer information is present.
- Have the customer INITIAL the appropriate payment type (insurance or self-pay).
- Have the customer INITIAL the 3-day waiver.
- Have the customer SIGN the contract.

Phase 5 — Full Assessment & Moisture Mapping

- Complete a full assessment of all affected areas.
- Moisture map each area.
- Mark all demo that is needed with blue tape or Sharpie.
- Add everything to the Assessment Checklist in CompanyCam.

Phase 6 — Set Equipment & Document

- Set 1 dehumidifier and 1 air scrubber in each affected area.
- Add all equipment to the Scope Sheet in Axiom.
- Record moisture, temperature, and humidity readings in the Dry Log.
- Add photos to the Assessment Checklist in CompanyCam.

Phase 7 — Sketch

- Complete a sketch of the affected areas using Magic Plan.
- Upload the sketch to Basecamp as a PDF.

Phase 8 — Schedule the Packout (From the Site)

- Call the packout team FROM THE JOB SITE to schedule the packout.
- Confirm the packout date and time with the homeowner before booking it.
- Add the packout date and time to the Job Calendar in Axiom.
- Select whether the packout is Onsite or Offsite.

Phase 9 — Schedule the Demo & Service Call (While Onsite)

- Schedule the demo AFTER the packout.
- Schedule the service call for 7 days after the demo.
- Confirm with the homeowner and against the calendar that the dates and times work.
- Add both to the Job Calendar in Axiom with 8:00 AM as the time for each.

Note: The actual service call time will vary and will be confirmed with the homeowner the day prior.

Phase 10 — Final Onboarding & Departure

1. Hold the final onboarding conversation with the homeowner.
2. Finish the Assessment Checklist in CompanyCam, export it as a PDF, and Share it.
3. Email the Assessment Checklist to the customer. Tell the customer: if the adjuster reaches out with questions or requests photos, get the adjuster's email address and forward the Assessment Checklist to the adjuster.
4. Answer any remaining questions the homeowner has.
5. Record your walkthrough video. Give a good overview of the job and all areas that need packout — open doors and drawers to show the packout team exactly what needs to be done, show where containment will be set, and show all areas that need demo.

BEFORE LEAVING THE JOB SITE: In Axiom, click Generate Text and send it to the dispatch thread — followed IMMEDIATELY by the walkthrough video you just recorded.

Appendix A — Do-Not-Leave Checklist

Do not leave the job site until every box below is checked.

☐	Claim filed and claim number recorded
☐	Contract signed — payment type initialed, 3-day waiver initialed, all rooms marked
☐	Estimate saved in Axiom (start date, completion date, contract price, \$0 deposit)
☐	Moisture map complete; demo areas marked with blue tape or Sharpie
☐	Equipment set (1 dehu + 1 air scrubber per affected area) and added to Axiom scope sheet
☐	Moisture, temperature, and humidity readings entered in dry log
☐	Assessment checklist in CompanyCam complete with photos, exported as PDF, shared and emailed to customer
☐	Magic Plan sketch uploaded to Basecamp as PDF
☐	Packout scheduled with team and homeowner; date/time and onsite/offsite on Axiom job calendar
☐	Demo and 7-day service call on Axiom job calendar at 8:00 AM
☐	Walkthrough video recorded (packout scope, drawers/doors opened, containment and demo areas shown)
☐	Generate Text sent to dispatch thread, immediately followed by the walkthrough video

Technician: _____ Date: _____ Job #: _____