DIAGNOSE: INSPECTION FIELD NOTES SYSTEM

MASTER SOP

WHAT IS THIS?

The Diagnose system is two documents that work together.
They are your playbook for every roof you walk.

DOCUMENT A: CONDITIONS REPORT

1 sheet of paper, front and back. You carry this on EVERY visit.

Takes 15–20 minutes on the roof. Gives you the roof's grade and tells you what to do next.

This is your triage tool. Diagnose before you prescribe.

DOCUMENT B: FIELD TAKEOFF PACKET

5–6 pages. Stays in the truck until Document A tells you to grab it.

Roof sketch, penetration inventory, photo checklist, deficiency checklist.

This is your deep dive. Only use it when the conversation warrants it.

THE DIAGNOSTIC HIERARCHY

This is the order you think in. Every time. On every roof.

1. **LOOK FOR INSURANCE FIRST**

   Before you grade anything, look for storm or casualty damage — hail dents, wind tears, debris cuts, projectile holes. If you see it, flag it on the Conditions Report. Do NOT tell the building owner it's covered. You don't know that yet. Just document what you see.

2. **THEN GRADE THE ROOF**

   Walk the roof and grade each component A through F. Circle the overall grade. This takes 15 minutes, not 3 hours.

3. **HAVE THE CONVERSATION**

   Come back down. Flip to the back of the Conditions Report. The decision tree tells you exactly what to recommend based on what you found.

4. **ONLY THEN GO DEEPER**

   If the conversation says "yes, scope the repairs" or "yes, give me a replacement number" — THAT'S when you grab Document B from the truck. Not before.

WHY THIS ORDER MATTERS:

If the roof has hail damage, it might be a free roof for the building owner.

A free roof changes every conversation.

Don't spend 3 hours pricing repairs on a roof that insurance might replace.

HOW TO USE DOCUMENT A

CONDITIONS REPORT · FRONT SIDE

BEFORE YOU LEAVE THE OFFICE

1. Know which roof system you're walking. Grab the right Conditions Report.

TPO roof? Grab the TPO sheet. Shingles? Grab the Shingles sheet.

2. Write the Job # in the top right corner.

Same number goes on Document B if you use it later.

3. If you don't know the roof system yet, bring one of each.

You'll figure it out when you get up there.

ON THE ROOF

Fill in the project info at the top — property, address, contact, date. Takes 30 seconds.

Then walk the roof and grade each component. Here's how the grades work:

A	Like new. You'd put this on a brochure.
B	Solid. Some wear but doing its job. A few minor things.
C	Getting tired. Multiple issues developing. Needs attention.
D	Hurting. Significant problems. Leaks coming if they haven't started.
F	Done. This roof is past repair. Replacement conversation.

You're not measuring anything. You're not counting fasteners.
You're looking and judging. Trust your eyes.

Use the "What to Look For" column as your cheat sheet. It tells you exactly what to check for each component.

Write quick notes in the Notes column — "NE corner worst" or "3 open seams."
Just enough to jog your memory later.

**After grading each component, circle the OVERALL ROOF GRADE at the bottom.
This is your gut call.**

THE STORM DAMAGE SECTION

At the bottom of the front page, there's a Storm & Casualty Damage section.
Check YES, NO, or POSSIBLE.

What to look for:

Hail	Circular dents or dimples in the membrane, soft spots in shingles, dented metal edge.
Wind	Lifted membrane, torn flashings, missing shingles, peeled-back edge metal.
Debris / Cuts	Punctures, slices, or tears from wind-blown objects.
Projectile	Bullet holes, BB damage. More common than you think.
Fallen tree / branch	Impact damage, punctured membrane, crushed insulation.

If you see damage, fill in the type, the estimated date of loss (if known), the approximate affected area in square feet, and a short description of what you see and where.

THE GOLDEN RULE

Never tell the building owner "your insurance will cover this."

**You don't know their policy. You don't know their deductible.
You don't know their exclusions. You don't know their co-insurance.**

All you say is: "I noticed some damage that might be worth looking into."

Then flag it for your team. That's it.

COME DOWN FROM THE ROOF. FLIP THE FORM OVER.

The back of the Conditions Report is your conversation guide.
It has two steps.

1 CHECK FOR INSURABLE DAMAGE

If you checked YES or POSSIBLE on the front, stop here. Don’t quote repairs. Don’t talk pricing. Flag it for your internal storm damage team to review. Insurance-funded replacement changes everything.

2 ROUTE BY GRADE

If there’s no insurable damage, use the overall grade you circled on the front. The form tells you exactly what to recommend:

A	Recommend SERVICE AGREEMENT. Don’t go deeper. Sell the maintenance.
B-C	Recommend REPAIR SCOPE + SERVICE AGREEMENT. Grab Document B and fill out the Deficiency Checklist.
D	Recommend COATING or REPAIR-TO-EXTEND. Grab Document B and do the full takeoff — sketch, penetrations, and checklist.
F	Recommend REPLACEMENT. Grab Document B but only do the sketch and penetration inventory. Don’t itemize repairs on a dead roof.

FILL OUT THE REST OF THE BACK

Top 3 Issues	Write the three things you want to lead the conversation with. These are your talking points.
Recommended Path	Check the box that matches your recommendation.
Sales Intelligence	Four questions to ask during the conversation:

- Who makes the final decision on roofing spend?
- What’s their fiscal year or budget cycle?
- Who’s their current contractor and how happy are they?
- How did they find us?

Conversation Notes	Write what the contact says about budget, timing, priorities. Gold for follow-up.
Next Steps	Check what happens next. Sign and date it.

HOW TO USE DOCUMENT B

FIELD TAKEOFF PACKET

WHEN TO GRAB IT

Only when the decision tree on the back of Document A tells you to.

Write the same Job # on Document B that you wrote on Document A.
These two documents are a matched set.

WHAT'S INSIDE (5–6 PAGES)

ROOF SKETCH

Draw the roof layout. Mark where you found problems using the row number from the deficiency checklist. Mark drains, HVAC units, pipes. Use the marking key printed on the page. Don't worry about making it pretty — make it accurate.

PENETRATION INVENTORY

Count and describe everything sticking out of or through the roof. HVAC units with curb sizes, drains, pipes, skylights. This page matters most for re-roof pricing.

PHOTO DOCUMENTATION

A checklist of required photos. Check them off as you shoot. Label your photos on your phone with the deficiency row number BEFORE you leave the roof. Write the total count at the bottom.

DEFICIENCY CHECKLIST

Every possible deficiency for that roof system, pre-printed with the exact name from the Commercial Roofer Field Manual. Check what you find. Write the quantity. Write a quick location note — "NE corner near HVAC-3."

THE PRIORITY COLUMN (★)

In the deficiency checklist, there's a small circle next to each row.

If something needs attention NOW — it's actively leaking, it's a safety hazard, it's going to get worse fast — fill in the circle. That's a priority item.

Everything without a filled circle is assumed routine. The estimator will see the priorities first.

WHICH PAGES TO USE (THE FORM TELLS YOU)

Grade B-C	Deficiency Checklist only. Skip the sketch and penetrations.
Grade D	Full packet — sketch, penetrations, photos, checklist.
Grade F	Sketch + penetrations only. Skip the deficiency checklist.

THREE RULES. NO EXCEPTIONS.

1 **TURN IN DOCUMENT A THE SAME DAY**

The Conditions Report goes to your manager or the office before you go home. Even if you haven't done Document B yet. This is the most important piece of paper because it has the grade, the recommendation, and the sales intelligence.

2 **TURN IN DOCUMENT B WITHIN 24 HOURS**

If you did the full takeoff, get it to the estimator within one business day. The longer you wait, the less accurate your notes are. Your memory fades. Turn it in fast.

3 **UPLOAD YOUR PHOTOS LABELED AND ORGANIZED**

Photos go into the job folder labeled by deficiency row number. If you have 40 photos with no labels, you just made the estimator's job 10x harder. Label them on the roof, not back at the office.

THE WHOLE SYSTEM IN ONE SENTENCE

Check for insurance. Grade the roof.
Have the conversation. Go deeper only if needed.

Attach a service agreement to everything.