

PitchKit

by GoodMeasureOS

One roof, start to finish.

Follow the Costigan job from the first inspection to the crew's start date on the five forms in PitchKit. Shown here for Eagle Eye Roofing, a made-up company.

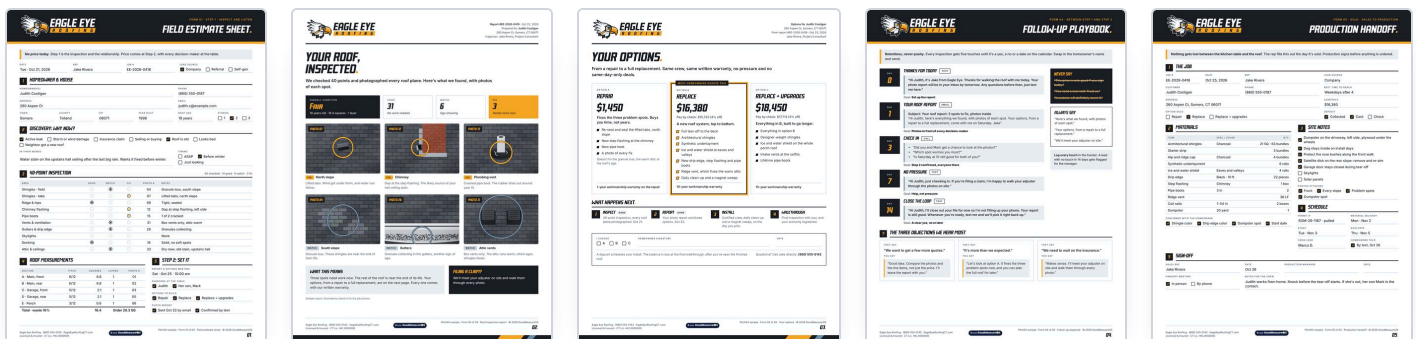
-  **Field estimate sheet**
Step 1 at the house. Inspect and listen; no price today.
- FORM 01
-  **Roof inspection report**
Photos of every problem spot, in the homeowner's inbox within a day.
- FORM 02
-  **Your options**
A repair to a full replacement, side by side, for Step 2 at the kitchen table.
- FORM 03
-  **Follow-up playbook**
Five touches until it's a yes, a no or a date on the calendar.
- FORM 04
-  **Production handoff**
Everything the crew needs, signed before anything is ordered.
- FORM 05

SELF-SERVE

Editable files you run yourself.

DONE FOR YOU

Your logo, colors and services on every page.



Eagle Eye Roofing is a made-up company. Every name, address, price and number in this sample is made up.
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FIELD ESTIMATE SHEET.

No price today. Step 1 is the inspection and the relationship. Price comes at Step 2, with every decision-maker at the table.

DATE Tue · Oct 21, 2026 REP Jake Rivera JOB # EE-2026-0418 LEAD SOURCE ☒ Company ☐ Referral ☐ Self-gen

1 HOMEOWNER & HOUSE

HOMEOWNER(S) Judith Costigan PHONE (860) 555-0187
ADDRESS 260 Aspen Ct EMAIL judith.c@example.com
TOWN Somers COUNTY Tolland ZIP 06071 YEAR BUILT 1998 ROOF AGE 19 years STORIES ☐ 1 ☒ 2 ☐ 3

2 DISCOVERY: WHY NOW?

☒ Active leak ☐ Storm or wind damage ☐ Insurance claim ☐ Selling or buying ☒ Roof is old ☐ Looks bad
☐ Neighbor got a new roof

IN THEIR WORDS

Water stain on the upstairs hall ceiling after the last big rain. Wants it fixed before winter.

TIMING

☐ ASAP ☒ Before winter
☐ Just looking

3 40-POINT INSPECTION

40 checked · 31 good · 6 watch · 3 fix

AREA	GOOD	WATCH	FIX	PHOTO #	NOTES
Shingles · field	☐	☒	☐	04	Granule loss, south slope
Shingles · tabs	☐	☐	☒	07	Lifted tabs, north slope
Ridge & hips	☒	☐	☐	09	Tight, sealed
Chimney flashing	☐	☐	☒	12	Gap at step flashing, left side
Pipe boots	☐	☐	☒	15	1 of 2 cracked
Vents & ventilation	☐	☒	☐	31	Box vents only, attic warm
Gutters & drip edge	☐	☒	☐	26	Granules collecting
Skylights	☐	☐	☐		None
Decking	☒	☐	☐	18	Solid, no soft spots
Attic & ceilings	☐	☒	☐	33	Dry now; old stain, upstairs hall

4 ROOF MEASUREMENTS

SECTION	PITCH	SQUARES	LAYERS	PHOTO #
A · Main, front	6/12	6.8	1	01
B · Main, rear	6/12	6.8	1	02
C · Garage, front	5/12	2.1	1	03
D · Garage, rear	5/12	2.1	1	05
E · Porch	3/12	0.6	1	06
Total · waste 10%		18.4	Order 20.3 SQ	

5 STEP 2: SET IT

REPORT & OPTIONS MEETING

Sat · Oct 25 · 10:00 am

EVERYONE AT THE TABLE

☒ Judith ☒ Her son, Mark

OPTIONS TO BUILD

☒ Repair ☒ Replace ☒ Replace + upgrades

PHOTO REPORT

☒ Sent Oct 22 by email ☒ Confirmed by text

YOUR ROOF, INSPECTED.

We checked 40 points and photographed every roof plane. Here's what we found, with photos of each spot.

OVERALL CONDITION

FAIR

19 years old · 18.4 squares · 1 layer

GOOD

31

No work needed

WATCH

6

Age showing

FIX

3

Needs work now

PHOTO 07



FIX North slope

Lifted tabs. Wind got under them, and water can follow.

PHOTO 12



FIX Chimney

Gap at the step flashing. The likely source of your hall ceiling stain.

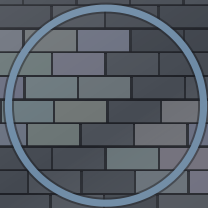
PHOTO 15



FIX Plumbing vent

Cracked pipe boot. The rubber dries out around year 15.

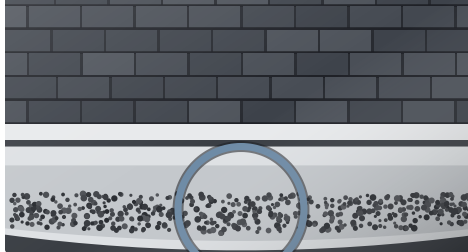
PHOTO 04



WATCH South slope

Granule loss. These shingles are near the end of their life.

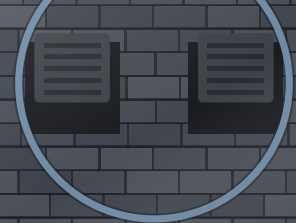
PHOTO 26



WATCH Gutters

Granules collecting in the gutters, another sign of age.

PHOTO 31



WATCH Attic vents

Box vents only. The attic runs warm, which ages shingles faster.

WHAT THIS MEANS

Three spots need work now. The rest of the roof is near the end of its life. Your options, from a repair to a full replacement, are on the next page. Every one comes with our written warranty.

FILING A CLAIM?

We'll meet your adjuster on site and walk them through every photo.

Sample report: illustrations stand in for the job photos.

YOUR OPTIONS.

From a repair to a full replacement. Same crew, same written warranty, no pressure and no same-day-only deals.

OPTION A

REPAIR

\$1,450

Fixes the three problem spots. Buys you time, not years.

- Re-seat and seal the lifted tabs, north slope
- New step flashing at the chimney
- New pipe boot
- A photo of every fix

Doesn't fix the granule loss, the warm attic or the roof's age.

1-year workmanship warranty on the repair

MOST HOMEOWNERS CHOOSE THIS

OPTION B

REPLACE

\$16,380

Pay by check: \$15,725 (4% off)

A new roof system, top to bottom.

- Full tear-off to the deck
- Architectural shingles
- Synthetic underlayment
- Ice and water shield at eaves and valleys
- New drip edge, step flashing and pipe boots
- Ridge vent, which fixes the warm attic
- Daily clean-up and a magnet sweep

10-year workmanship warranty

OPTION C

REPLACE + UPGRADES

\$18,450

Pay by check: \$17,712 (4% off)

Everything in B, built to go longer.

- Everything in option B
- Designer-weight shingles
- Ice and water shield on the whole porch roof
- Intake vents at the soffits
- Lifetime pipe boots

15-year workmanship warranty

WHAT HAPPENS NEXT.

1 INSPECT DONE

40-point inspection, every roof plane photographed. Oct 21.

2 REPORT DONE

Your photo report and these options. Oct 22.

3 INSTALL

Certified crew, daily clean-up and a magnet sweep, on the day you pick.

4 WALKTHROUGH

Final inspection with you, and your warranty registered.

I CHOOSE

☐ A ☐ B ☐ C

HOMEOWNER SIGNATURE

DATE

A deposit schedules your install. The balance is due at the final walkthrough, after you've seen the finished roof.

Questions? Call Jake directly: **(860) 555-0142**

FOLLOW-UP PLAYBOOK.

Relentless, never pushy. Every inspection gets five touches until it's a yes, a no or a date on the calendar. Swap in the homeowner's name and send.

DAY

0

THANKS FOR TODAY TEXT

"Hi Judith, it's Jake from Eagle Eye. Thanks for walking the roof with me today. Your photo report will be in your inbox by tomorrow. Any questions before then, just text me here."

Goal: **Set up the report**

DAY

1

YOUR ROOF REPORT EMAIL

Subject: Your roof report: 3 spots to fix, photos inside

"Hi Judith, here's everything we found, with photos of each spot. Your options, from a repair to a full replacement, come with me on Saturday. Jake"

Goal: **Photos in front of every decision-maker**

DAY

3

CHECK IN CALL

- "Did you and Mark get a chance to look at the photos?"
- "Which spot worries you most?"
- "Is Saturday at 10 still good for both of you?"

Goal: **Step 2 confirmed, everyone there**

DAY

7

NO PRESSURE TEXT

"Hi Judith, just checking in. If you're filing a claim, I'm happy to walk your adjuster through the photos on site."

Goal: **Help, not pressure**

DAY

14

CLOSE THE LOOP TEXT

"Hi Judith, I'll close out your file for now so I'm not filling up your phone. Your report is still good. Whenever you're ready, text me and we'll pick it right back up."

Goal: **A clear yes, no or later**

NEVER SAY

~~"This price is only good if you sign today."~~

~~"You need a new roof. Trust us."~~

~~"Insurance will definitely cover it."~~

ALWAYS SAY

"Here's what we found, with photos of each spot."

"Your options, from a repair to a full replacement."

"We'll meet your adjuster on site."

Log every touch in the tracker. A lead with no touch in 14 days gets flagged for the manager.



THE THREE OBJECTIONS WE HEAR MOST

THEY SAY

"We want to get a few more quotes."

YOU SAY

"Good idea. Compare the photos and the line items, not just the price. I'll leave the report with you."

THEY SAY

"It's more than we expected."

YOU SAY

"Let's look at option A. It fixes the three problem spots now, and you can plan the full roof for later."

THEY SAY

"We need to wait on the insurance."

YOU SAY

"Makes sense. I'll meet your adjuster on site and walk them through every photo."



PRODUCTION HANDOFF.

Nothing gets lost between the kitchen table and the roof. The rep fills this out the day it's sold. Production signs before anything is ordered.

1 THE JOB

JOB #	SOLD	REP	LEAD SOURCE
EE-2026-0418	Oct 25, 2026	Jake Rivera	Company
CUSTOMER	PHONE	BEST TIME TO REACH	
Judith Costigan	(860) 555-0187	Weekdays after 4	
ADDRESS	CONTRACT	DEPOSIT	
260 Aspen Ct, Somers, CT 06071	\$16,380	☒ Collected ☒ Card ☐ Check	
OPTION SOLD			
☐ Repair ☒ Replace ☐ Replace + upgrades			

2 MATERIALS

ITEM	SPEC / COLOR	QTY
Architectural shingles	Charcoal	21 SQ · 63 bundles
Starter strip		3 bundles
Hip and ridge cap	Charcoal	4 bundles
Synthetic underlayment		6 rolls
Ice and water shield	Eaves and valleys	4 rolls
Drip edge	Black · 10 ft	22 pieces
Step flashing	Chimney	1 box
Pipe boots	3 in	2
Ridge vent		36 LF
Coil nails	1-1/4 in	2 boxes
Dumpster	20 yard	1

CONFIRMED WITH THE HOMEOWNER

☒ Shingle color ☒ Drip edge color ☒ Dumpster spot ☒ Start date

3 SITE NOTES

- ☒ Dumpster on the driveway, left side, plywood under the wheels
- ☒ Dog stays inside on install days
- ☒ Protect the rose bushes along the front walk
- ☒ Satellite dish on the rear slope: remove and re-aim
- ☒ Garage door stays closed during tear-off
- ☐ Skylights
- ☐ Solar panels

PHOTOS ATTACHED

- ☒ Front ☒ Every slope ☒ Problem spots
- ☒ Dumpster spot

4 SCHEDULE

PERMIT #	MATERIAL DELIVERY
SOM-26-1187 · pulled	Mon · Nov 2
START	RAIN DATE
Tue · Nov 3	Thu · Nov 5
CREW LEAD	HOMEOWNER TOLD
Marco D.	☒ By text, Oct 26

5 SIGN-OFF

SALES REP	DATE	PRODUCTION MANAGER	DATE
Jake Rivera	Oct 26		
HANDOFF MEETING	NOTES FOR THE CREW		
☒ In person ☐ By phone	Judith works from home. Knock before the tear-off starts. If she's out, her son Mark is the contact.		