

Wilbanks Web Design

MODEL A • WEBSITE INTAKE • STEPS 1–7

EXAMPLE COMPLETED INTAKE

What strong client answers look like

This example uses a sample roofing company so clients can see the level of specificity that gives the website builder useful direction. The question order, section structure, choices and visual treatment mirror the current Wilbanks Website Intake. Replace all example facts with the client's real information.

Important: The example intentionally expands all conditional page and feature sections so the guide demonstrates every possible intake field. Actual clients only see conditional questions triggered by their selections.

1. Your business and website goal

Start with the information that determines who the website should persuade and what it should help them do.

Business identity

Business name as it should appear *

Summit Peak Roofing

Legal business name for small print

Summit Peak Roofing LLC

Industry *

Roofing ▼

Year the business started

2018

In one sentence, what does your business do? *

We provide residential roof repair, full roof replacement, storm-damage response, inspections and gutter services for homeowners across Chicago and the near suburbs.

Audience and positioning

Describe your ideal customer *

A homeowner in Chicago or a nearby suburb, usually age 30–70, who owns a single-family home or small multifamily property and needs a dependable roofer. They care more about trustworthy advice, clear communication and quality workmanship than getting the absolute lowest bid. Many are contacting us because they have an active leak, storm damage, an aging roof or want to solve a problem before it gets worse.

What situation usually causes someone to look for your business?

They notice a leak, missing or curling shingles, hail/wind damage, water staining, an aging roof near the end of its life, or they are preparing to sell/buy a home and want a professional inspection.

Why should a customer choose you? List your three strongest reasons. *

1. Clear, honest recommendations - we explain whether a repair is enough instead of automatically pushing replacement.
2. Fast, dependable communication - calls and quote requests are answered quickly and customers know what happens next.
3. Clean, professional workmanship - experienced crews, quality materials and a thorough cleanup after every job.

What we will cover

1. Business and goal

2. Pages and features
3. Page content
4. Contact and functionality
5. Visual direction
6. Assets and plan
7. Final review

Required questions are marked with an asterisk. Optional rough notes are enough for the first preview.

What is the strongest proof that customers can trust you?

Locally owned and fully insured, with documented manufacturer certifications, a 5-year workmanship warranty and consistently strong customer reviews that specifically mention communication, cleanliness and honest estimates.

Are there customers or jobs you do not want the website to attract?

We do not want large commercial roofing projects, jobs more than about 35 miles outside Chicago, or bargain-only shoppers looking for temporary cosmetic fixes. We primarily want residential repair and replacement work.

Primary result

What is the single most important result this website should produce? *

Quote requests ▼

What should the main button say? *

Request a Free Estimate

What should happen when it is clicked? *

Open a quote or contact form ▼

What must a visitor understand within five seconds? *

Summit Peak Roofing is a trustworthy Chicago-area residential roofer for repairs and replacements, with fast communication, clean workmanship and free estimates.

Is there a secondary action you want visitors to take?

Call (312) 555-0184 to speak with us directly

Your answers are temporarily saved in this browser tab.

Continue

2. Pages and functionality

We recommend a starting plan based on your industry. Accept it or customize it. Only your selected items will generate follow-up questions.

Recommended starting plan: About, Services, Individual service pages, Service areas, Gallery, Reviews, FAQ, Team and Contact;

Phone, Request a quote, Booking, Map and directions and Social links. [Use recommended plan](#)

What should customers be able to view?

☒ **Learn about the business**

About page and your story.

☒ **View services**

A clear services overview.

☒ **Read detailed service pages**

A dedicated page for each priority service.

☒ **See where you work**

Service-area and local coverage pages.

☒ **See completed work or photos**

Gallery, projects or before-and-after work.

☒ **Read customer reviews**

Testimonials and trust proof.

☒ **Find common answers**

A dedicated FAQ page.

☒ **Meet the owner or team**

Profiles, roles, bios and photos.

☒ **Contact the business**

Contact options, hours and location details.

What should customers be able to do?

☒ **Call the business**

Prominent click-to-call buttons.

☒ **Request a quote**

A configurable website enquiry form.

☒ **Book an appointment**

Link to or embed a scheduling account.

☒ **Get directions**

Map, location and visitor instructions.

What we will cover

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- 2. Pages and features**
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☒ **Open social profiles**
Show selected social-media links.

Homepage priorities

Select the sections that should appear on the homepage. Their order below becomes the default homepage order.

☒ **Trust signals**

☒ **Services**

☒ **How it works**

☒ **Gallery**

☒ **Reviews**

☒ **FAQ**

☒ **Service areas**

☒ **Contact or booking**

What are the three most important things that must appear on the homepage? *

1. A clear "Request a Free Estimate" call to action above the fold.
2. Immediate trust proof: insured, certified, workmanship warranty and strong customer reviews.
3. A simple overview of our main services with real project photos and clear Chicago-area coverage.

Your answers are temporarily saved in this browser tab.

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3. Content for the pages you selected

These sections appear only when they are relevant to your selected pages.

About the business

What story should customers know about the business?

Summit Peak Roofing was started in 2018 because we believed homeowners deserved a more transparent roofing experience. Too many people only hear from a roofer when something is already wrong, then feel pressured into a decision they do not fully understand. We built the company around clear inspections, practical recommendations, dependable scheduling, clean job sites and roofing systems designed for Midwest weather.

Do you have a tagline?

Roofing advice you can trust. Workmanship built to last.

Services

List services in priority order. The first complete service is treated as the default primary service unless you name another below.

Which service should receive the most homepage attention?

Roof Repair

What we will cover

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Service 1

Service name *

Roof Repair

Priority

Primary service - feature prominently ▼

What is included and who is it for?

For homeowners with active leaks, missing shingles, flashing issues or localized damage. We diagnose the source first and recommend the smallest durable repair that solves the problem.

Key inclusions or benefits

Leak diagnosis
Shingle replacement
Flashing and vent-boot repair
Photo documentation before/after

Pricing or estimate message

Free on-site estimates; final price depends on the source and extent of damage.

Service 2

Service name

Roof Replacement

Priority

Important ▼

What is included and who is it for?

Complete tear-off and replacement for aging, heavily damaged or end-of-life roofs. Includes material guidance, ventilation review, installation and cleanup.

Key inclusions or benefits

Architectural shingle systems
Underlayment and ice/water protection
Ventilation review
Magnetic nail sweep and cleanup

Pricing or estimate message

Free replacement estimate with written scope and material options.

Service 3

Service name

Storm Damage Repair

Priority

Important ▼

What is included and who is it for?

Inspection and repair for wind, hail and fallen-debris damage. We document visible damage and explain practical repair options; the homeowner remains responsible for insurance decisions.

Key inclusions or benefits

Storm inspection
Emergency tarping when available
Damage photos
Repair/replacement recommendations

Pricing or estimate message

Free estimate after inspection; insurance coverage is never guaranteed.

Service 4

Service name

Gutter Installation

Priority

Secondary ▼

What is included and who is it for?

Seamless gutter and downspout installation for homeowners replacing worn gutters or improving drainage around the home.

Key inclusions or benefits

Seamless aluminum gutters
Downspout placement
Gutter guards when appropriate
Drainage recommendations

Pricing or estimate message

Quoted by project after measuring the home.

Service 5

Service name

Roof Inspection

Priority

Secondary ▼

What is included and who is it for?

A professional visual roof assessment for homeowners who are concerned about age, recent weather, a home sale or an unexplained interior stain.

Key inclusions or benefits

Condition assessment
Photos of notable issues
Repair priorities
Remaining-life discussion when practical

Pricing or estimate message

Free when connected to a repair/replacement estimate; standalone inspections quoted in advance.

Service 6

Service name

Emergency Tarping

Priority

Mention only ▼

What is included and who is it for?

Short-term weather protection for existing customers and nearby homeowners after sudden storm damage, when crew availability and site conditions allow.

Key inclusions or benefits

Temporary weather protection
Basic damage documentation
Next-step repair recommendation

Pricing or estimate message

Call for availability; emergency service is not guaranteed 24/7.

Are there services you offer but do not want advertised?

Large commercial flat-roof projects, new-construction roofing for developers and very small cosmetic patch jobs outside our normal service area.

Service areas

Which cities, neighborhoods or ZIP codes matter most? List them in priority order. *

Chicago: Lakeview, Lincoln Park, North Center, Roscoe Village, Logan Square, Ukrainian Village, West Town
Near suburbs: Oak Park, River Forest, Evanston, Skokie, Park Ridge and Niles
Primary ZIP examples: 60613, 60614, 60618, 60622, 60647

Gallery or projects

What should this page be called?

Our Work ▼

Which projects or images should appear first?

Lead with the cleanest finished-roof exterior photos, then show one strong before/after storm repair, one in-progress installation that demonstrates workmanship and one gutter project. Avoid blurry images, cluttered driveways and photos where the roof is too small to understand.

Customer reviews

Use exact customer wording. Include a source link when available.

Review 1

Customer display name

Sarah L.

Source

Google

Exact review text

"Summit Peak Roofing was fast, honest and incredibly easy to work with. They explained why a repair was enough instead of trying to sell us a whole new roof. The crew was professional and the cleanup was spotless."

Source link

<https://example.com/reviews/sarah-l>

☒ Feature this review prominently

Review 2

Customer display name

Mark T.

Source

Google

Exact review text

"After a storm caused a leak, they responded quickly, documented the damage and explained every option clearly. The repair was completed when promised and we have had no issues since."

Source link

<https://example.com/reviews/mark-t>

☐ Feature this review prominently

Review 3

Customer display name

Jennifer R.

Source

Facebook

Exact review text

"Professional crew, clear pricing and great communication from start to finish. We always knew what was happening and our new roof looks excellent."

Source link

<https://example.com/reviews/jennifer-r>

☐ Feature this review prominently

Frequently asked questions

Include real questions, concerns or objections customers raise before buying.

Question 1

Question

How do I know whether I need a repair or a full roof replacement?

Answer

We look at the roof's age, overall condition and the extent of the damage before recommending anything. If a focused repair is likely to solve the problem reliably, we will say so. Replacement is usually discussed when damage is widespread or the roof is near the end of its useful life.

Question 2

Question

Do you provide free estimates?

Answer

Yes. We provide free estimates for repair and replacement projects in our normal service area. We will explain the scope, options and next step before any work is scheduled.

Question 3

Question

How long does a typical roof replacement take?

Answer

Many standard residential replacements are completed in one to two working days. Larger or more complex roofs can take longer, and weather can affect scheduling. We set expectations before work begins.

Question 4

Question

Can you help after hail or wind damage?

Answer

Yes. We can inspect visible storm damage, take photos and recommend repair or replacement options. We can provide documentation for the homeowner, but we do not promise or determine insurance coverage.

Question 5

Question

What happens to the property during cleanup?

Answer

We protect the work area as practical, remove roofing debris and perform a final cleanup that includes a magnetic nail sweep. We want the property to look cared for when we leave.

Owner or team profiles

Person 1

Name

Daniel Carter

Job title

Owner / Project Consultant

Short biography

Daniel founded Summit Peak Roofing in 2018 after years in residential exterior construction. He focuses on straightforward recommendations, clear estimates and making sure homeowners understand their options before work begins.

Person 2

Name

Maria Lopez

Job title

Operations Manager

Short biography

Maria coordinates scheduling, customer communication and project logistics. Her priority is making sure customers know what to expect before, during and after their roofing project.

Person 3

Name

Chris Bennett

Job title

Field Supervisor

Short biography

Chris oversees installation quality and job-site standards. He works directly with crews on safety, workmanship, cleanup and final quality checks.

Customer process

Describe what normally happens from first contact through completion. This can become a “How it works” section.

Step 1 title

Request an Estimate

What happens?

Call us or submit the website form with your address, service need and a short description of the problem.

Step 2 title

On-Site Assessment

What happens?

We inspect the roof, document what we see and explain repair or replacement options in plain language.

Step 3 title

Review the Written Quote

What happens?

You receive a clear scope, material choices when applicable, pricing and scheduling expectations before approving work.

Step 4 title

Complete the Work

What happens?

Our crew completes the project, cleans the site and walks through the finished work and warranty information with you.

Your answers are temporarily saved in this browser tab.

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4. Contact details, trust and selected features

These details control calls, enquiries, booking, maps, opening hours and public trust claims.

Public contact details

Phone customers should call *

Email for website enquiries *

How should your address appear publicly? *

Show only city and state

▼

Street address

City *

State *

ZIP code

Existing website, if any

Google Business Profile link

Hours and availability

Monday

Tuesday

Wednesday

Thursday

What we will cover

- 1. Business and goal
- 2. Pages and features
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Friday

8:00am–5:00pm

Saturday

8:00am–1:00pm

Sunday

Closed

Do you take emergency or out-of-hours calls?

Yes ▼

What should the site say about emergency availability?

Storm damage or an active roof leak? Call us. Limited after-hours emergency tarping may be available depending on location, weather and crew availability.

Claims we may publish

☒ Licensed

☒ Bonded

☒ Insured

☒ Free estimates

License number

Example: IL Roofing License #104.012345

Certifications or trade bodies

Owens Corning Preferred Contractor, NRCA member

Exact warranty or guarantee wording

Our installation workmanship is backed by a 5-year labor warranty. Eligible roofing products also carry the applicable manufacturer warranty. Full written terms are provided with the project agreement.

Offers, financing, guarantees or seasonal promotions to mention

Free estimates. Financing options are available to qualified customers through our financing partner; approval and terms vary. Do not advertise a discount unless a current promotion has been specifically approved.

Quote-request form**Where should quote requests be delivered?**

estimates@example.com

Select the questions customers should answer:

☒ Name

☒ Phone

☒ Email

☒ Address or ZIP

☒ Requested service

☒ Project description

☒ Preferred date

☒ Photo upload

☐ Budget

☒ Referral source

Online booking

Booking platform

Calendly

Booking URL

<https://example.com/summit-peak-roof-assessment>

How should booking open?

Embed the scheduler on the website ▼

Map and visitor information

May customers visit without an appointment?

No ▼

Parking, entrance or direction notes

Our office is not a walk-in retail location. Please call or book an appointment before visiting. Most estimates take place at the customer's property.

Social profiles

Facebook

https://facebook.com/summitpeakroofing

Instagram

https://instagram.com/summitpeakroofing

LinkedIn

https://linkedin.com/company/summitpeakroofing

YouTube

https://youtube.com/@summitpeakroofing

TikTok

https://tiktok.com/@summitpeakroofing

Other profile

https://example.com/summit-peak-yelp-profile

Your answers are temporarily saved in this browser tab.

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5. Visual direction and writing style

Choose the closest starting point. Your industry remains a fallback, but your selections now control the visual direction directly.

Starting design

☒ **Bold Trades**
Large type, strong contrast and prominent calls to action.

☐ **Clean Professional**
Restrained, straightforward and trustworthy.

☐ **Auto Shop**
Darker, practical and service-focused.

☐ **Calm Studio**
Warm, spacious and premium.

☐ **Table Service**
Visual, welcoming and hospitality-focused.

☐ **Choose for me**
Use the most appropriate starting point for the business.

Look and feel

Choose up to three words that should describe the website.

☒ **Modern**

☐ **Traditional**

☒ **Bold**

☐ **Minimal**

☐ **Friendly**

☒ **Premium**

☐ **Rugged**

☐ **Calm**

☐ **Technical**

☐ **Energetic**

☐ **Local**

☐ **Family-oriented**

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What should the website definitely not look or feel like? *

Do not make it flashy, cluttered, gimmicky or like a generic “storm chaser” roofing site. Avoid excessive animations, giant blocks of all-caps text, fake urgency, overly dark pages and stock photos that look staged. It should feel established, local, clean and confident.

Link two or three websites you like and explain what you like about each

https://example.com/inspiration-1 — I like the simple navigation, large project photography and clear estimate button.
https://example.com/inspiration-2 — I like the clean spacing, restrained blue palette and trust badges near the top.
https://example.com/inspiration-3 — I like the service cards and before/after project presentation; I do not want to copy its exact colors.

Any websites or styles you dislike? What specifically do you dislike?

I dislike roofing sites that use flashing banners, too many red/yellow urgency colors, crowded coupon graphics or generic stock photos of smiling crews on every section. I also dislike sites where it takes several seconds to understand what the company actually does.

Light or dark preference

Mostly light ▼

Information density

Balanced ▼

Font style

Bold industrial ▼

How closely should we follow existing branding?

Closely follow it ▼

Brand colors

Primary color

#0F4C81

Deep blue - use for headings, brand accents and trust elements.

Accent color

#F4B400

Warm gold - use selectively for buttons and highlights.

Colors that must not be used

Neon green, bright purple, hot pink

Writing style

Choose up to three tones.

☐ Straightforward

☒ Friendly

☒ Professional

☐ Premium

☒ Reassuring

☐ Technical

☐ Urgent

☐ Conversational

☐ Playful

☐ Traditional

Should the copy speak as:

We ▼

What should visitors feel?

Relieved, confident and certain they are dealing with a professional local roofer.

Words, phrases, slogans or claims that must appear

Use "free estimate," "locally owned," "residential roofing," "serving Chicago and nearby suburbs," and our tagline "Roofing advice you can trust. Workmanship built to last."

Words, claims or topics that must not appear

Do not say "cheapest," "lowest price," "best roofer in Chicago," "insurance will pay," "guaranteed approval," or "24/7 emergency service." Avoid exaggerated superlatives unless they can be objectively proven.

Required disclaimers, license wording or disclosures

Display the roofing license number in the footer and contact area. For financing, say "Financing available to qualified customers; approval and terms vary." For storm claims, do not imply we determine insurance coverage.

Your answers are temporarily saved in this browser tab.

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6. Photos, files and plan selection

Separate uploads tell the website generator what each asset is for instead of forcing it to guess.

Brand and photo assets

Upload original files you created, commissioned or have permission to use. Never submit passwords or sensitive account data.

Primary logo

**Example files uploaded**

summit-peak-roofing-logo.svg

Alternate logo versions

**Example files uploaded**

summit-peak-logo-white.svg; summit-peak-icon.svg

Preferred homepage hero image

**Example files uploaded**

project-lakeview-finished-roof-hero.jpg

Owner or team photos

**Example files uploaded**

daniel-carter-owner.jpg; maria-lopez-operations.jpg; chris-bennett-field.jpg

Completed work, location, product or service photos

**Example files uploaded**

lakeview-before.jpg; lakeview-after.jpg; oak-park-install.jpg; storm-repair-before.jpg; storm-repair-after.jpg; seamless-gutters.jpg

What we will cover

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Brand guidelines, menus, brochures or reference files



Example files uploaded

summit-peak-brand-guide.pdf; residential-roofing-brochure.pdf

Photo notes

project-lakeview-finished-roof-hero.jpg — completed architectural-shingle replacement; strongest exterior photo; use as homepage hero.

lakeview-before.jpg / lakeview-after.jpg — same project before and after; keep together in gallery.

oak-park-install.jpg — crew installing underlayment; use in Roof Replacement page.

storm-repair-before.jpg / storm-repair-after.jpg — wind-damage repair; use on Storm Damage page.

seamless-gutters.jpg — finished gutter/downspout detail; use on gutter service page.

team photos — use only with the matching person's bio; do not crop faces tightly.

Which images are your favorites, and which should not be used prominently?

Favorites: the Lakeview finished-roof hero, Lakeview before/after pair and Oak Park installation photo. Use these first. Do not use the older phone photo with the work truck prominently because the image is dim and the truck branding is outdated.

Did you take these photos or pay for them? *

Yes

May we use licensed stock photos when needed?

Only after approval

Pricing plan

☒ Model A — managed subscription

\$0 down and \$99 per month for hosting, maintenance and included content updates.

☐ Model B — own the site outright

\$999 one time. Finished client-specific files are handed over after payment.

Anything else

What else should we know before building the first preview?

Please make the site feel like an established local roofing company rather than a national franchise. Prioritize clarity and trust over flashy effects. The main conversion is a free estimate request, but the phone number should remain easy to find. Use real project photography wherever possible and keep service-area language focused on Chicago and nearby suburbs.

Your answers are temporarily saved in this browser tab.

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7. Final alignment and review

Define what success looks like, review the key choices and submit everything in one package.

Approval standard

What would make you immediately dislike the first preview? *

I would immediately dislike it if it felt generic or looked like a template that could belong to any contractor; if the homepage was cluttered; if it used fake urgency, aggressive sales language or too many bright colors; if stock photography dominated over our real work; if the free-estimate action was hard to find; or if commercial roofing appeared to be a major focus.

Complete this sentence: “I will consider the first preview successful if...” *

I will consider the first preview successful if a homeowner can immediately tell what we do, where we work and why they should trust us; the design feels modern, professional and specific to Summit Peak Roofing; our best project photos are prominent; the services and process are easy to scan; and requesting a free estimate or calling us feels obvious from every important page.

Your selections

Business

Summit Peak Roofing — residential roofing for Chicago and nearby suburbs.

Primary result

Quote requests — “Request a Free Estimate” opens the website quote form.

Pages

About, Services, individual service pages, Service areas, Our Work, Reviews, FAQ, Team and Contact.

Features

Click-to-call, quote form, embedded Calendly booking, map/directions and social links.

Design

Bold Trades; Modern + Bold + Premium; mostly light; deep blue #0F4C81 with gold #F4B400.

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Writing

Friendly + Professional + Reassuring; speak as “we”; no hype or unsupported superlatives.

Plan

Model A — managed subscription.

Final acknowledgement

- ☒ I confirm the business claims, contact information and asset rights I supplied are accurate.
- ☒ I understand this intake provides onboarding information and does not itself execute a contract or authorize a charge.
- ☒ I have not submitted passwords, full card numbers or other secrets.

Your answers are temporarily saved in this browser tab.

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Submit website intake