

# Service Contractor Business Checklist

**Date:** \_\_\_\_\_ **Contractor Name:** \_\_\_\_\_

**Permit Number (if applicable):** \_\_\_\_\_ **Job Description:** \_\_\_\_\_

**Inspection Required (Yes/No):** \_\_\_\_\_ **Pre-Service Checklist:** \_\_\_\_\_

## Initial Assessment:

- Conduct a detailed site inspection
- Identify the scope of work and any potential issues
- Provide a comprehensive quote with itemized costs

## Permits and Permissions:

- Obtain necessary permits
- Verify customer has given permission for the work

## Safety Measures:

- Conduct a safety briefing with all team members
- Ensure all team members use appropriate personal protective equipment (PPE)
- Verify that all tools and equipment are in good working condition

## Site Preparation:

- Clear the work area of any obstructions
- Ensure adequate lighting and ventilation for the work area

## Task Planning:

- Create a detailed task plan with timelines
- Assign tasks to specific team members based on their expertise
- Ensure all team members understand their responsibilities

## Materials and Equipment:

- Verify that all required materials and equipment are on-site
- Inspect materials for quality and suitability
- Ensure all equipment is properly calibrated and ready for use

## Final Documentation:

- Record model and serial numbers of new components
- Note any issues encountered and how they were resolved
- Obtain customer signature for completed work

## Execution:

- Follow the task plan meticulously
- Document any deviations from the plan and their reasons
- Maintain a clean and organized work area throughout the project

## Quality Assurance Checklist:

- Conduct regular inspections throughout the project
- Verify that all work meets industry standards and regulations
- Address any issues immediately to prevent delays

## Customer Feedback:

- Engage with the customer regularly to gather feedback
- Adjust the work plan as necessary based on feedback
- Ensure customer satisfaction at every stage

## Post-Service Checklist:

- Conduct a comprehensive final inspection
- Ensure all work meets the agreed-upon specifications
- Document the final condition of the work area

## Clean-Up:

- Remove old components
- Clean the work area thoroughly
- Ensure all tools and equipment are accounted for

## Customer Walkthrough:

- Explain the work performed to the customer
- Provide maintenance tips and safety advice
- Answer any customer questions

## Digital Reporting:

- Provide customers with a digital report of the work performed, including photos and detailed descriptions.

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**Sustainability Practices:**

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- Document any eco-friendly practices used during the service, such as recycling materials or using energy-efficient tools.

## Unique Additions:

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**Digital Reporting:**

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- Most competitors still rely on paper reports or simple checklists. Digital reports enhance transparency and customer trust.

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**Follow-Up Survey:**

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- Actively seeking post-service feedback shows a commitment to continuous improvement and customer satisfaction.

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**Customer Portal:**

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- Providing an online portal sets you apart by offering convenience and continuous engagement.

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**Sustainability Practices:**

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- Few competitors highlight eco-friendly practices, giving you a unique selling point in environmentally conscious markets.

Comments: \_\_\_\_\_

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Signatures: \_\_\_\_\_

Technician Signature: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_

Date: \_\_\_\_\_