

JOB #.....
CUSTOMER NAME.....

Install Hot Water
Performance standards



Installers Checklist

- 1/ Is the truck clean and presentable for work?.....y/n
- 2/ Am I neat and presentable in appearance in company attire
Hair brushed; uniform clean, good personal hygiene, etc?.....y/n
- 3/ Have I pre packed the vehicle off the daily stock lists?.....y/n
- 4/ Have I received the job order(s) for the day?.....y/n
- 5/ Have I booked time slots with customers and clients for all jobs?.....y/n
- 6/ Have I received or packed necessary parts or products for the above job order(s)? (double check work orders).....y/n
- 7/ If packed have the parts or products been scanned through the stock out system?.....y/n
- 8/ Before driving to next job! Have I spoken with the client or tenant to arrange precise time?.....y/n
- 9/ Have I filled in departure time on invoice triplicate sheet?.....y/n
- 10/ Am I on time (4 minutes either way of the negotiated time) or do I have to let the customer know?y/n
- 11/ Have I filled in the arrival time on the invoice triplicate sheet?.....y/n
- 12/ Have I been courteous and respectful on introduction to the customer greeting them with my full name representing the company name and presenting them with my magnet card?.....y/n
- 13/ Have I assessed the job efficiently?.....y/n
- 14/ Have I provided an honest open book pricing policy where we discussed and agreed on time materials and price to complete the job to the best of our knowledge?.....y/n
- 15/ Have I got the customer to sign the estimation approval before we start work?
(If estimation price not resolved travel and time to estimate required.).....y/n
- 16/ Before I start installation, have I prepared a risk assessment sheet?.....y/n
- 17/ Before I start installation, have I prepared access, tools and materials to execute the most efficient and safest job possible, for the customer?.....y/n
- 18/ Have I preformed the best possible job for the customer?.....y/n
- 19/ Have I thoroughly cleaned up after myself removing all scrap, rubbish and tools?.....y/n
- 20/ Have I given the customer the details of there warrantee with there invoice including final amount?
Including tally of total, time materials, and system costs?.....y/n
- 21/ Have I collected the required amount graciously?.....y/n
- 22/ Have placed on the installation and service sticker on tank, picket sign out front and given the customer the marketing pack?.....y/n
- 23/ Have I stapled the work order, estimation, risk assessment to the invoice and filed in the mini office?.....y/n
- 24/ Has the cheques or money been placed in the mini safe for daily collection?.....y/n
- 25/ Have I contacted the next customer?.....y/n
- 26/ Have I marked down the start travel time for the next job?.....y/n

Installer sign here Please print name.....

DATE....../...../.....