



OVERALL CHECKLIST

OFFICE STAFF CHECKLIST

Initial customer contact _____ (initials) Date _____ Time _____
 Answered Voicemail Email My Estimate Other _____

Customer Information

Name _____ Cell Phone _____

Address _____ Alt Phone _____

City _____ State _____ Zip _____ Email _____

Pre-Qualifying Discussion

Type of fence(s) _____ Approximate footage _____

Reason for fence _____ Required HOA approval YES NO

How did you hear about us? Existing Customer Referral Google Search Other

Are you getting multiple quotes: YES NO

Notes _____

Placed in Company Customer Database File (contact info, assigned sales member, etc.)

Assigned to Sales Team _____ Date _____ Time _____

Option 1- Assigned by Admin (determine criteria)

Sales Member Assigned _____

Appointment Scheduled Date _____ Time _____

Forwarded to Sales Member via _____

Option 2- Assigned to Sales Team (to schedule appointment) (determine criteria)

Forwarded to Sales Team Member via _____

Sales Member Assigned _____



SALES CHECKLIST

Customer Appointment Information received ____ *(initials)* **Date** _____ **Time** _____

Option 1- Assigned by Admin

Sales Team Member Customer Contact **Date** _____ **Time** _____

Confirm Appointment Scheduled

Date _____ **Time** _____

Sales Team Member Appointment Confirmation (24 hours in advance)

Option 2- Assigned to Sales Team (to schedule appointment)

Forwarded to Sales Team Member via _____

Sales Member Assigned _____

Appointment Scheduled **Date** _____ **Time** _____

Sales Team Member Appointment Confirmation (24 hours in advance)

On-site Appointment

**The steps below can be modified as required to support level of experience*

- Arrive 10 minutes early- place door hangers 3-6 houses left/right/across
- Reconfirm all contact information is correct
- Initial Walk-through with Customer based on type/style from customer call-in
- Confirm fenceline measurements and layout
- Complete cost estimate via spreadsheet, technology, etc. *(onsite)*
- Discuss company strengths/certifications/portfolio and provide estimate
- SELL the project- DON'T give them a price- Ask for sale –

“Ms. Jones, have I provided you everything you need to make a decision?

If so, can we get your project scheduled the week of _____?”

- Complete the agreement/workorder/contract *(hardcopy or electronic)*
 - Confirm the customers information AGAIN
 - Discuss the particulars on agreement *(type/style, property lines, follow terrain, etc)*



- Outline the description/scope of work in DETAIL
- Provide drawings of home, sidewalks, driveways, pools, fenceline & measurements
- Discuss and require customer initials for Terms & Conditions
- Discuss deposit requirement and how to process (*determine criteria*)
- Confirm HOA or survey requirements
- Confirm customer's signature
- Properly stake/paint corners/gates and take pictures

Customer/Project Job Folder

- Convert appointment to project sold in database (*required to maintain data on conversions*)
- Completed agreement/workorder/contract and deposit information
- Highlight schedule commitments/deadlines
- Attached project pictures with notes as required
- Completed material list for all fence types on project
- Highlighted special materials list needs (*materials order/gate shop/wood shop/etc.*)
- Sub-contract price outline (*as required*)
- Project close out document
- Complete pre-cost job outline (*material cost-labor cost-incidentals cost-overhead % cost to meet minimum margins*)

Assigned to Operations

Date _____ Time _____



OPERATIONS CHECKLIST

Job Folder received from Sales _____ *(initials)*

Date _____ **Time** _____

- Evaluate project job folder requirements
 - Confirm completed Customer Information
 - Confirm highlight schedule commitments/deadlines
 - Confirm T & C initialed as required
 - Confirm deposit received by office staff
 - Confirm customer signature
 - Confirm detailed written description of work
 - Confirm detailed drawing layout
 - Confirm HOA or survey requirements
 - Confirm project staked/project pictures
 - Confirm material list for all fence types on project
 - Inventory confirmed _____ *(initials)* Date _____
 - Confirm highlighted special materials list needs *(materials order/gate shop/wood shop/etc.)*
 - Special material(s) in-house shop tickets issued Date _____
 - Describe _____ Date Required _____
 - Describe _____ Date Required _____
 - Other _____
 - Special material(s) vendor order issued Date _____
 - Describe _____ Date Required _____
 - Describe _____ Date Required _____
 - Other _____
- Confirm sub-contract price outline *(as required)*
- Confirm project close out document is available
- Notify Office Staff to establish customer account



- Confirm special order materials, shop work, etc. is complete & ready
- Project materials staged
- ONE-CALL locates as required
- Projected scheduled & Sales Team Member notified
- 24-hour advanced notice to customer & sales team member of schedule
- Close out document for customer signature
 - Sales Team Member
 - Operations Manager
 - Work Crew
- Project assigned to installation crew Date _____

INSTALLATION CHECKLIST

Dispatched from Operations _____ (*initials*) Date _____ Time _____

- Project materials loaded & totals confirmed
- Project completion
- Project materials unloaded & totals returned to operations
- Project labor hours totaled and provided to operations

OPERATIONS CHECKLIST- CONTINUED AFTER PROJECT COMPLETION

- Re-inventoried returned materials by operations
- Complete post-cost job outline (*ACTUAL material cost-labor cost-incidental cost-overhead % cost to confirm margins*)
- Job folder to Office Staff for final billing and post-cost job margin outline

OFFICE STAFF CHECKLIST- CONTINUED AFTER PROJECT COMPLETION

- Project final billing
- Email customer with following:
 - Request Referrals
 - Request Complete reviews
 - Thank-You Note
- Update ACTUAL Budget Information