MotionOps

CONTRACTOR SCALER HUB · BUILD A SALES PROCESS YOUR TEAM CAN RUN

Discovery and Site Visit Checklist

Goes with the lesson on the discovery and site visit process. One copy per visit: the packet before you go, the questions, what to measure and photograph, the close, and the visit summary that goes to estimating within 24 hours.

1. Before the visit: the packet

Whoever books the visit sends the estimator this, so they don't walk in cold.

CUSTOMER

VISIT DATE AND TIME

ADDRESS

ESTIMATOR

- [ ] Call notes and lead score from qualifying
- [ ] Photos the customer sent
- [ ] Address checked on a map
- [ ] Budget range already discussed: $_____ to $_____
- [ ] Who will be there, and who decides
- [ ] Visit confirmed by text the day before
- [ ] Everyone who decides asked to be there

ANYTHING THE CUSTOMER MENTIONED THAT MATTERS: PETS, PARKING, A DEADLINE

2. Discovery: ask before you measure

The answers change what you measure and what you propose. Write them in the customer's words: "wants it to feel bigger" is more useful in the proposal than "open concept."

GOAL. WHAT DO YOU WANT THIS TO LOOK AND WORK LIKE WHEN IT'S DONE? (THE SCOPE YOU PRICE, AND THE OPTIONS YOU OFFER)

REASON. WHY NOW? WHAT HAPPENS IF YOU WAIT? (URGENCY, AND WHAT TO LEAD WITH IN THE PROPOSAL)

MUST-HAVES. WHAT HAS TO BE INCLUDED, AND WHAT WOULD BE NICE? (SEPARATES THE BASE SCOPE FROM OPTIONS)

CONCERNS. HAVE YOU DONE WORK LIKE THIS BEFORE? WHAT WENT WELL OR BADLY? (THE WORRIES YOUR PROPOSAL NEEDS TO ANSWER)

BUDGET. IS THE RANGE WE TALKED ABOUT STILL COMFORTABLE? (ONE SCOPE, OR GOOD, BETTER AND BEST OPTIONS)

TIMELINE. IS THERE A DATE THIS HAS TO BE DONE BY? (SCHEDULING, AND WHETHER YOU CAN COMMIT)

DECISION. HOW WILL YOU DECIDE, AND WHO ELSE IS INVOLVED? (WHO THE PROPOSAL HAS TO CONVINCE, AND WHEN TO FOLLOW UP)

3. Documentation: measure and photograph once

Keep one checklist per job type you sell most: bathroom, kitchen, deck, panel upgrade. Fill it in on site, so nobody drives back for a measurement and anyone in the office can see what was found. The tinted rows are from a made-up deck replacement.

JOB TYPE

CHECKLIST VERSION OR DATE

Measurement the estimate needs	Value, with units	Photo
Example Deck size	16 × 20 ft	
Example Height off grade	7 ft, measured	

Photos that must be taken

- [ ] Every wall or side
- [ ] Access
- [ ] Existing conditions up close
- [ ] Electrical panel or water heater, if relevant

Condition to check: damage, rot, old wiring, slope, soil	What was found	Changes the price?
Example Existing footings	Photographed; two cracked	Yes

Access and logistics

PARKING

HOW MATERIALS GET IN (EXAMPLE: GATE IS 36 IN, MATERIALS MUST BE CARRIED)

WHERE A DUMPSTER CAN GO

WORKING HOURS

CODE OR PERMIT QUESTIONS TO LOOK UP BEFORE PRICING (EXAMPLE: CUSTOMER WANTS CABLE RAIL; CHECK LOCAL CODE)

4. End the visit: the same three things

- [ ] **What happens next:** "You'll have the proposal by Thursday."
- [ ] **How it will be presented:** "I'd like to walk you both through it by phone or in person, about 20 minutes."
- [ ] **A time for that walkthrough,** booked before you leave

PROPOSAL PROMISED BY

WALKTHROUGH BOOKED FOR (DATE, TIME, PHONE OR IN PERSON)

A booked walkthrough is the start of your follow-up. A proposal emailed with no conversation can sit unanswered.

5. Visit summary for estimating, within 24 hours

The next estimator, the project manager and the crew read this page when the job is sold, even if the person who visits also prices the job. **Test it: could someone else price this job from this page?**

WRITTEN BY

DATE

CUSTOMER AND JOB

CUSTOMER AND DECISION MAKERS: NAMES, WHO DECIDES, HOW THEY'LL DECIDE

GOAL AND MUST-HAVES, IN THE CUSTOMER'S WORDS

OPTIONS TO PRICE: WHAT'S BASE SCOPE AND WHAT'S OPTIONAL

MEASUREMENTS AND PHOTOS: LINKED OR ATTACHED, FROM THE CHECKLIST

CONDITIONS AND RISKS: ANYTHING THAT COULD CHANGE THE PRICE OR THE SCHEDULE

BUDGET AND TIMELINE CONFIRMED ON SITE

NEXT STEP: PROPOSAL DATE AND BOOKED WALKTHROUGH

6. Once a month: keep everyone calibrated

- [ ] **Ride-alongs:** a new estimator goes on a few visits with an experienced one before going alone, then the other way round
- [ ] **Summary review:** the owner or lead estimator reads a few visit summaries from each person and asks, "Could someone else price this job from this page?"
- [ ] **Missed items:** every change order caused by something the visit should have caught goes back into the checklist

What to review

What to review	This month	What we changed
Visits that needed a second trip or a call back for missing information		
Days from visit to proposal		
Change orders caused by something the visit missed		