MotionOps

CONTRACTOR STARTER HUB · TURN LEADS INTO BOOKED JOBS

Site Visit Checklist

One copy per visit: decide whether this is a job you want, and collect everything you need to price it without a second trip.

CUSTOMER	PHONE	JOB ADDRESS	VISIT DATE AND TIME

1. Before you go

- [ ] Confirmed the day before by text: date, time, address, and who will be there. "Will everyone who decides on the project be there?"
- [ ] Reviewed the photos the customer sent and my intake notes from the first call
- [ ] Checked the property age, if it matters for my trade. Year built: _____. Before 1978 and the job will disturb paint: the EPA lead renovation rule applies. I take it only if my firm is certified and I follow the rule's lead-safe work practices; otherwise I refer it to a certified firm
- [ ] Planned 45 to 90 minutes for a typical residential visit, plus travel (a starting assumption)

- [ ] **Kit packed:** tape measure and laser measure, flashlight, phone with a charged battery, notepad or estimate template, business cards, shoe covers, and the tools my trade needs to look properly (moisture meter, voltage tester, ladder)

2. On site: the walkthrough, in the same order every time

- [ ] **Listen first.** Let the customer walk you through the problem and what they want. Write their words down (below)
- [ ] **Look at the whole area**, not only the spot they point at. Note what's next to it, above it and below it
- [ ] **Measure everything you'll price**, twice. Write the units next to every number (section 3)
- [ ] **Photograph** (section 4), then **ask the site questions** (section 5)
- [ ] **Agree what's in and out** of the job, out loud: "So the estimate will cover [X] and [Y], not [Z]. Is that right?" (end of section 5)

- [ ] **Say what happens next** before you leave: when the estimate arrives, how it arrives, and how to approve it. Estimate by: _____ via: _____

THE CUSTOMER'S WORDS: THE PROBLEM AND WHAT THEY WANT

3. Measurements: everything you'll price, twice

Area or item	1st measure	2nd measure	Units	Photo with tape
Example Living room, north wall	14' 2" × 8'	14' 2" × 8'	ft, in	Yes

4. Photos to take: ask first inside a home, and keep faces and personal items out of the shot

- [ ] **Wide shot** of the room or area, from the doorway
- [ ] **Close-ups** of the problem and of anything damaged
- [ ] **Every measurement point**, with the tape in the shot
- [ ] **Access:** driveway, gate, stairs, doorways the materials must pass through
- [ ] **Labels and serial plates** on equipment you'll work on or near
- [ ] **Existing damage** you didn't cause: scratches, cracks, stains. These protect you later
- [ ] **Utilities:** shutoffs, panel, meter, if they matter for the job

5. Questions to ask on site

Question	Why it matters	Answer
Where can I park and unload?	Time, tickets, damage to their driveway or lawn	
What hours can we work? Any days off-limits?	Scheduling and noise	
Are there pets or kids at home during the work?	Safety, doors and gates	
Where are the water shutoff and electrical panel?	You may need them on day one	
Is there an HOA or building management? Do they need to approve the work?	Approvals and work rules that can delay the start	

Question	Why it matters	Answer
Have you had work done here before? What went wrong?	Hidden problems and customer expectations	
Do you want to buy any of the materials yourself?	Who is responsible if they're wrong or late	
When do you want to decide, and what will you decide on?	Price, timing, materials, or trust	

Any digging? Buried utilities must be marked first: contact 811 (free) a few business days before you begin.

AGREED OUT LOUD: IN THE JOB

AGREED OUT LOUD: NOT IN THE JOB

6. Trade add-ons

Trade	Also check
Plumbing	Pipe material and condition, main shutoff location and condition, water heater age, size and label, drain cleanouts, water pressure if relevant
Electrical	Panel brand, capacity and free spaces, grounding, signs of overheating, the route for new wire, whether a permit is needed
HVAC	Equipment make, model, serial and age, filter size, duct access, thermostat type, condensate drain, clearance around the equipment
Painting	Surface condition, previous coatings, year the home was built, furniture to move, ceiling heights
Remodeling	What's behind the wall if you can see it (attic, basement, access panels), floor level, structural concerns to bring in an engineer for
My trade: _____	My add-ons and the tools I need to bring:

7. Red flags: slow down, or walk away

- [ ] The person can't approve the work and the owner won't be involved
- [ ] They ask you to skip a permit or "keep it off the books"
- [ ] The scope changes every few minutes and they won't agree what's in and out
- [ ] They want a firm price on the spot for work you haven't fully seen

- [ ] Another contractor left the job half done and they won't say why
- [ ] They tell you they never pay deposits, when your terms require one

Not every visit should become an estimate. "I don't think I'm the right fit for this one" is a complete answer.

8. After the visit: within 24 hours

- [ ] **Wrote up my notes** while I remember them: measurements, photos labeled by area, scope in and out, questions I still have
- [ ] **Sent any open questions** to the customer the same day
- [ ] **Built the estimate** with a clear scope, line items and assumptions
- [ ] **Sent it by the date I promised**, and put a follow-up date in my calendar: _____
- [ ] **Timed this visit**, to price visits later. On site: _____ Travel: _____ Write-up: _____