

First visit checklist

For the first job at any new property. The visit that sets what every later visit is measured against.

Client	_____	Service (clean / garden / pest / other)	_____
Property address	_____	Team member	_____
Date and arrival time	_____	Scheduled duration	_____

1. On arrival

- ☐ Arrived within the window given to the client. If running late, client messaged before the window started
- ☐ Access worked as described (key, lockbox, alarm, gate). Note anything different below
- ☐ Introduced yourself and confirmed what today covers in one or two sentences
- ☐ Vehicle parked where agreed

2. Walk-through with the client (or on your own if they are out)

- ☐ Every area in the agreed scope seen, photographed before starting
- ☐ Anything already damaged, worn or broken photographed and noted below
- ☐ Hazards identified: chemicals, pets, children, fragile items, slippery surfaces, powerlines, wasps
- ☐ Client priorities asked for and written down. The thing they care about most goes first
- ☐ Products, allergies, and anything to avoid confirmed
- ☐ Where to put rubbish, green waste and recycling confirmed

3. Scope check

AREA / TASK IN THE QUOTE	DONE	NOT POSSIBLE TODAY (WHY)	EXTRA WORK FOUND (QUOTE BEFORE DOING)

4. Before leaving

- ☐ Each completed area photographed, same angles as the before shots
- ☐ Doors, windows and gates left as found, alarm set if required
- ☐ Keys returned to the agreed place
- ☐ Client told what was done, what was not, and why, in person or by message before you drive off
- ☐ Next visit date and time confirmed

☐ Anything that needs a separate quote logged for the office the same day

5. Notes

PRE-EXISTING DAMAGE, ACCESS ISSUES, HAZARDS, CLIENT REQUESTS

Team member signature _____ Client signature (if present) _____

Punctuality is the single most-praised trait in NZ cleaning, garden and pest control reviews (31 to 39% of positive reviews). A follow-up after the visit is mentioned in under 6%. Both are on this page.