First Job Preparation Checklist

Prepare the job before you arrive so both you and the customer know what to expect.

Put it into practice

1. Confirm the agreed scope, exclusions, quote, payment terms, location, time, and access.

2. Check service-specific needs, equipment, supplies, transport, and your competence to perform the work.

3. Plan arrival and cleanup. Confirm who to contact if access or conditions differ.

Starter example

Before starting: walk through the agreed work with the customer. If the scope differs, pause and agree on the change and any price adjustment before doing extra work.

Your next action

Job / date / contact method / supplies to prepare

After the job, record time and costs, confirm completion, and send the agreed payment information. Keep customer details secure.

Continue with the practical decision guide and worksheet on the next pages.

Use three checkpoints around the first job

Work through the decision

The preparation stage is where avoidable misunderstandings become visible. Read the agreed scope before loading equipment. Confirm which customer preparations are essential, who will provide access, and how you will handle a change in condition or availability. Keep a realistic travel and setup allowance.

On arrival, compare the job with the agreed description. Check access and the work area. Ask about anything that changes how the service should be performed. Stop and clarify if conditions make the work unsuitable or outside your competence. Extra work should be agreed, including any price change, before it begins.

A situation to learn from

Example: an interior detailing appointment was quoted for light soil, but the vehicle contains heavy pet hair. Explain the difference, identify what the original package covers, and offer an assessed change or a reduced scope if you can deliver it. Do not silently add a fee or rush to complete work beyond the appointment.

How to respond

At completion, compare the work against the checklist, explain any agreed exceptions, and confirm payment information. A photo record can be useful only when appropriate and permitted. Keep an internal note of time, supplies, and any issue. The first job should improve your process for the next one.

Before / during / after job record

Use this page with your own service and circumstances. Record assumptions separately from confirmed facts, and update the plan using actual work.

Before: job reference, date, agreed scope, price basis, access, contact method.

During: condition confirmed, changes agreed, start/finish time, supplies used.

After: tasks checked, exceptions explained, payment status, follow-up date.

Learning: estimated hours versus actual hours; one preparation step to improve.

Review before taking the next step

If a customer raises a concern, listen and compare it with the agreed scope. Establish the facts before promising a remedy, refund, or extra work.

- [ ] Tools and supplies suit the actual task.
- [ ] Scope changes documented and agreed.
- [ ] Completion reviewed with the customer where practical.
- [ ] Records contain only necessary information.

Ready for the connected business system?

Explore the $49 systems for launch guidance, tools, and working templates.

Explore Readyvora Business Systems