

# Field Service Site Visit Checklist

GATHER INFORMATION		NOTES
Discuss opportunity with customer/salesperson		
Ask for drawings, schematics, relevant documentation for equipment/site		
PPE Requirements		
Safety Requirements / Site specific training / JSA		
Define Customer Expectations		Why are we going out?
General description of work environment		
Personal documentation required for site		Passport, Twic Card, Birth Cert, etc
Site Hours		

SITE VISIT EXPECTATIONS		NOTES
Pictures		Outside of site entrance Building with entrance door Equipment/work area Important components/hoses/fittings Walls/obstacles Possible job hazards
Information gathering to create BOM		Sizes of hose/tube/connections/system pressures/flow
Estimate labor requirements		
Contact information for site		
Confirm Safety Regulations		
Determine necessary tooling required for job		
Make customer aware of quoting leadtime		Predicated on when the work is to be completed

After Site Visit Tasks		NOTES
Create hard and soft folder for information		
Review Notes to determine Materials Required		
Estimate Labor & Travel Hours, Expenses		Use Costing Workbook
Place information in folder		Photos Notes Job Costing Workbook BOM Safety Info Site Contact w/Contact Info
Schedule a meeting with coordinator and technician(s) tentatively assigned		
Kick out all information to parties invited to meeting		
Prepare checklist for meeting		and job summary

Kick off Meeting		NOTES
Follow Checklist for meeting		
Take notes based upon technician concerns		
Review materials, hours and tooling		
Review Safety		
Are customer's expectations realistic???		Create job scope

Preparing to Quote the Customer		NOTES
Finalize Job Scope		
Finalize Job Costing Sheet		hours, bom, expenses
Make sure all documentation is in Soft Folder for view when generating quote		
Submit for quoting		