Customer home visit procedure

SOP TEMPLATE

SOP no.		Version		Effective date	
Owner		Approver		Review date	

Purpose

To give every customer the same professional experience in their home.

Scope

Every visit to a customer's home or business, by every tradesperson.

Responsibilities

Role	Responsibility
Tradesperson	Follows this procedure on every visit.
Office	Confirms bookings and tells customers about delays.

Procedure

1. **Confirm the booking**

   Confirm the day before, and message the customer if you are running late.

2. **Arrive and introduce yourself**

   Arrive in uniform, show ID, and explain what you will do today.

3. **Protect the home**

   Use drop sheets and shoe covers, and move furniture only with permission.

4. **Explain changes before you make them**

   If you find extra work, explain it and the cost, and get approval before doing it.

   > **Caution:** Never start a variation without the customer's approval in writing.

5. **Clean up**

   Remove waste, vacuum dust and leave the area as you found it.

6. **Hand over**

   Show the customer the finished work, explain any care or warranty, and ask for a review.

Records

- The job notes and photos.
- Any approved variation.

Related documents

- Job completion checklist

Revision history

Version	Date	What changed	Approved by