Customer Sign-Off and Final Site Walkthrough Documentation

1.0 Objective & Scope

The objective of this procedure is to ensure a consistent, documented, and legally defensible handover of completed work to the customer. This SOP applies to all field installation and service teams responsible for final site walkthroughs and customer sign-offs. The Lead Installer or Service Technician is responsible for executing this procedure and obtaining the required documentation before leaving the site.

2.0 Required Equipment & Tools

- Mobile tablet or smartphone with SiteQueue application installed and logged in
- Digital signature capture capability (enabled in SiteQueue)
- Camera for completion photos (minimum 3: overall view, close-up of work, and any defect or touch-up area)
- Printed or digital copy of the work order / scope of work for reference
- Touch-up paint, sealant, or minor repair kit (if applicable to the job)
- Pen and clipboard (backup for paper sign-off if digital fails)
- Personal protective equipment (PPE) as required by site safety rules

3.0 Site Safety & Hazard Assessment

- High-visibility vest, steel-toed boots, and hard hat required on all active construction or industrial sites.
- Conduct a final visual sweep of the work area for trip hazards, debris, or tools left behind before inviting the customer.
- Ensure all equipment is powered down and secured before walkthrough begins.
- Be aware of customer-specific safety rules (e.g., no photography in sensitive areas, restricted zones).
- If the site is occupied, coordinate with the site superintendent to avoid walkthrough during active operations (e.g., forklift traffic).

4.0 Step-by-Step Execution Procedure

1. Complete all physical work and perform a self-inspection using the work order checklist. Verify that every line item is marked complete and any defects are noted.
2. Clean the work area thoroughly: remove all debris, packing materials, tools, and personal items. Wipe down surfaces if necessary.
3. Take three mandatory completion photos in SiteQueue: (1) overall view of the installed work, (2) close-up of a key detail or connection, (3) any area requiring touch-up or that deviates from the scope.
4. Notify the customer or their authorized representative that the work is complete and request a final walkthrough. Use SiteQueue to log the time of notification.
5. Escort the customer through the work area, pointing out key features, any deviations from the original scope, and areas that may require future maintenance. Answer all questions clearly.

6. If the customer identifies a deficiency, assess whether it can be corrected immediately. If yes, correct it on the spot and re-photograph. If not, document the deficiency in SiteQueue as a punch-list item and agree on a resolution timeline.

7. Once the customer is satisfied, open the digital sign-off form in SiteQueue. Confirm the customer’s name, company, and contact information. Ask them to review the summary of work completed.

8. Capture the customer’s digital signature directly in SiteQueue. Do not use a paper form unless the digital system is unavailable. If using paper, scan or photograph the signed form and upload it to the work order within 24 hours.

9. After signature, provide the customer with a digital or printed copy of the sign-off document. Confirm they have received it and thank them for their business.

10. Close the work order in SiteQueue by marking it as ‘Completed – Signed Off’. Ensure all photos, notes, and the signature are attached. Submit the order for billing.

5.0 Verification, Sign-off & Reporting

1. Verify that the digital signature in SiteQueue matches the customer’s name on the work order. If there is a discrepancy, contact the customer immediately for clarification.

2. Review all uploaded photos for clarity and completeness. Blurry or incomplete photos must be retaken before closing the order.

3. Log any punch-list items or deficiencies in SiteQueue with a clear description, photo, and agreed-upon resolution date. Assign follow-up to the appropriate team member.

4. Submit the completed work order for billing. Ensure the customer sign-off is attached as a PDF or screenshot within the order record.

5. If the customer refused to sign or raised a formal dispute, do not close the order. Immediately escalate to the Field Operations Manager via SiteQueue’s internal messaging or phone. Document the reason for refusal in the notes.

6. File a copy of the signed-off work order in the company’s document management system (e.g., SharePoint, Google Drive) for audit and warranty purposes.