



Site Measurement Flow

1. Admin Prepares Estimate Work Order

1. Prepare the estimate work order. Print the client's name, physical address of the site, and any notes. Attach a map.

Bring to the site the following:

- Clipboard
- Measuring Wheel
- Camera with a clean disk

2. Schedule the work order

2. Schedule the work order. Post statues to Tracking System.

3. Check site and take work order photo

3. When you get to the site, check to make sure you are at the correct address and take the first photo of the work order.

4. Measure all areas and total

4. Measure all parking lots, driveway entrances, walks ways, and loading docks, etc. Write each measurement on the work order and total. Measure in Square Feet or Square Meters.

5. Circle the difficulty of the site

5. Circle if the site is Easy, Normal, or Difficult.

6. Make a rudimentary sketch of the site

6. Make a sketch of the building, parking lots, and walks. Please include steps, doorways, lawn areas, fire hydrants, gates, mancovers, dumpsters, loading docks, etc. Make sure you document all measurements on the drawing.

7. Take photos of site and damage



8. At Office, complete the Estimate Work Order



9. Print out photos and store photos



10. Quote Site Pricing and print out



11. Staple all work



12. Start Proposal Process

7. Take photos of all areas and measurements. Take photos in the order you will be plowing and shoveling to better understand the site.

8. Return to the office and redraw the sketch, making sure all measurements are neat and checked. Write client's name and address, the total square footage of the lot and walks, and the difficulty rating on the top of the drawing. Also, label all adjacent roads and streets on the drawing. Color-code and highlight all lots, driveways, and entrances in yellow, Walks and Docks in orange, Grass areas in green, Snow stacking areas in blue, and hazard areas in red.

9. Print out photos and label areas. Download your photos into the Sales Potential Client Folder under the client's name.

10. Use the Snow Calculation Tool to quote the site. And print out the excel report.

11. Staple in order the work order, map, drawing, and photos. Add all correspondences to create a proposal packet. Post statues to Tracking System.

12. Mark completed on Tracking Tool and start the Proposal Process.