**SURVEY PROCEDURE CHECKLIST**

Customer Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Survey: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Estimator Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dress Code Followed ( YES NO )

Checked File Before Leaving ( YES NO )

Parked Appropriately ( YES NO )

Let customer make eye contact first ( YES NO )

Knocked and Stepped Away from Door ( YES NO )

Said, ‘Hi I am (name) with KM ( YES NO )

Asked for customer’s name ( YES NO )

Waited to be invited in ( YES NO )

Asked to take off shoes ( YES NO )

Explained Survey Process ( YES NO )

Tallied Floors Completely before moving to next ( YES NO )

Consulted with Customer at table or counter top ( YES NO )

Explained Survey, KM Flyer and AYRFMD Sheets ( YES NO )

During departure stated,

 ‘I just want you to know KM would love to have your business.’ ( YES NO )

Made sure customer name on TOM after survey ( YES NO )