Conducting a Successful Site Inspection/ Walk Through

When looking at what makes a successful site inspection or client walk through we should consider 3 main steps: **Preparation, Presentation and Follow-up**

Preparation: Before we conduct a walk through consider the following and remember:

"Under no circumstances should the job walk be left to chance"

1. Be On Purpose

What is the purpose of the walk? What do we as a company want to accomplish as a result of this meeting/walk through?

Some examples of what we might want to accomplish would include:

- Confirmation of Client Satisfaction
- Renewal of the Agreement
- Selling Add on Services or Enhancements
- Following up with a Request
- Gaining Clarity of the Client's Expectations
- Problem Solving with Suggested Remedies
- Building a Relationship and moving the Relationship to Partnership

Ask yourself what does the client want to accomplish from this meeting?

Some examples of what the client might want to accomplish include:

- To express concern
- To become familiar with the site conditions
- Prepare a budget
- To satisfy a tenant
- To follow up on their superior's request

List your purposes for your next walk:

1. ____
2. ____
3. ____

List some client's purposes for the walk:

1. ____
2. ____
3. ____

Be on Purpose and determine what the purpose is BEFORE you go on the walk

2. Become Familiar with the Job and Client Status

- Visit the job site PRIOR to the walk to re-acquaint yourself with the idiosyncrasies of the job site. On smaller jobs this can be done 10-15 minutes prior to the walk on the larger jobs this needs to be done several days in advance

- Talk with your Foreman and /or your supervisor to get their perspective of the client's needs, site conditions and status of work schedules

- Make crews aware of the walk through as far in advance as possible. Determine specific expectations that need to be accomplished prior to the walk. Be VERY clear what is expected. Show them, not just tell them.

- Now you that you are familiar with the job site call the client and take their temperature. Let them know what is going on with the job and get some of their perspective/feedback. This will help set the stage for the walk and get the wheels rolling for what needs to be done BEFORE the walk occurs.

- If the client is not available very often the person that is taking the message can be a resource on what is happening from the client's perspective. Such info like, the owners are arriving on this date, the grand opening is on this date or we have heard tenant's concerns about this or that. Get as much info from the client's perspective before the meeting.

- Review the job file/info, specifications and financials you should know at the very least the following about the job:
  - When is the job renewing?
  - What is an extra and what is part of the contract requirements?
  - What is our financial status (gross margin) on the maintenance? On extra work?
  - What is the Account Receivable / AR status on this job?
  - In the recent correspondence is there any business pending: a needed letter, an authorization or a proposal?
  - Should we bring copies of anything? Maybe a site map to help mark areas

What are some key things you should know about the job before the walk?
____
____

What are the key issues with the job?
Landscape Issues:
____
____

Client Issues:
____

3. Bring the Necessary Tools to the Walk Through

- Bring a note pad/clip board (a clean one without any other miscellaneous notes on them) and a pen or pencil to write with. Sometimes a tape recorder is a better choice.

- Bring a camera to help document and use for crew punch lists or for proposals for enhancement work. These can be used for start-ups, before and after shots, documentation of conditions or damage or training and education.

- Bring some estimating forms, authorization for extra work forms, unit pricing sheet, a measuring wheel, job site maps and a calculator. While it is not a good idea to quote prices "on the fly" it is a good idea to have the tools to put together an estimate after the walk and be able to present it to them that day before leaving the job site. Allow enough time after the walk to do all of the groundwork for extra work proposals rather than coming back at another time. Sometimes timeliness is the best way to secure a sale. Be prepared.

- Bring a soil probe. Many times an opinion of too much water or too little of water can be easily resolved with a soil probe.

- Wear appropriate attire. If walking with the engineer, a suit and tie may not be the best bet. If meeting with the Board of Directors or owners your company t-shirt may not be the best choice either. Use good judgment in this area based on the rule of dressing within one level of the person being met. In any case always have a pair of shoes that can withstand water, mud, etc. available and used when the time arrives.

- Bring your sales tools. These include business cards, brochures, samples of plants, client request forms, photos, etc. Sales opportunities can arise at any time.

- Wear a hardhat if required by the job site. If the work site is under construction wear a company hardhat with your logo.

- Bring along some trash bags. Most Property Managers have a real concern for trash and debris on their project. Even if we have done everything right in our preparation, including debris removal, litter can appear from nowhere. Bring along a small bag like those from the supermarket. This will further establish your interest and concern for the project. You do not want your client picking up trash while you are watching!
- Make sure your vehicle is clean, presentable and ready for touring the job if necessary. No wrappers, soda cans or baby seats in the vehicle. Be prepared.

What tools should you bring to your next walk that will help the most?
1. ____
2. ____

3. ____

4. Prepare Strategies, Goals and an Agenda

Give some thought to the following questions and suggestions:

- Who should attend and for what purpose? All key players should discuss a game plan and objectives for the walk-through or meeting so we are in alliance and on the same page.
- What is the significance of this job to the overall company?
- Do some role-playing and anticipate the clients' reactions. Prepare for the best and worst scenarios.
- What are the schedules for specialized crews like tree pruning, extra work, spray department and irrigation technicians? You should know these in case the need comes up in the walk through and you need to be able to let your customer know when specialized work can be scheduled.

What is your strategy and what are your goals for the walk through?
1. ____
2. ____
3. ____

What do you anticipate the Client's concerns or needs are?
1. ____
2. ____
3. ____

How will we deal with their needs or concerns? What are we prepared to do or offer?
1. ____
2. ____
3. ____

Who should attend and what will their role be? Who will be the point person?
____
____

Check on specialized work crews schedule to anticipate their needs.
How far backlogged is the extra work crew? Can we shift around if needed?
____
____
____

5. Be in Charge and Be in Control of the Walk Through

- We should be proactive, taking the initiative to request the walk-through. It shows we care. All too often we wait for the *client* to contact *us* for a site inspection. Even if we are having problems it is better for us to alert the client and get their involvement than have it appear the reverse.

"You're the expert, you should be telling me what is wrong with my landscape and what needs to be fixed, that's why I hired you!" sound familiar?

- Ideally, we should be selecting the time and place of the inspection, and better yet, we should pick the time when the landscape looks its best.

- Don't assume the client is satisfied because they have not had a walk through. We must constantly reinforce their satisfaction and the site inspection remains the best way to accomplish this.

- Determine the amount of time needed and allow time to arrive early and stay late incase an estimate or any on-site follow up is needed.

- If there are problems, be proactive and have possible solutions prepared with the costs that are involved for each issue.

- If the problems are maintenance related be prepared to review what we are doing and when to expect the desired results. Recovery from a problem often ties us more firmly with the client, so look at problems as opportunities.

- Prepare a basic agenda with priorities to be reviewed and be prepared to add or change this, as the client deems necessary. Get the client involved.

- Make a preliminary inspection with appropriate staff to verify that items are in order. Determine the route of inspection and have the route prepared

What is the agenda for your walk?

Is the job ready for a walk through?
What needs to be brought up to speed before the walk?
1. ____
2. ____
3. ____

What route will we take for the walk?
____

What maintenance items will be reviewed?
1. ____
2. ____

3. ____

What issues are there currently with the job and what are we suggesting to remedy?
1. ____
2. ____
3. ____

What enhancements are we suggesting to improve the job?
1. ____
2. ____
3. ____

How will these benefit the Client?
1. ____
2. ____
3. ____

Presentation

Ok we have everything prepared for a successful walk**.** Here are a few tips to help show off our workmanship.

Set the Time and Day to Exhibit the Landscape at it's Best

- Try to have the inspection 2-3 days after mowing. The turf has recovered from mowing and will not appear scalped or shaggy.

- Mornings are usually best from a presentational point of view because moisture levels and plant vigor are at their highest. Caution: Do not have it so early that a preliminary check of the site for stuck-open valves, trash and obvious defects such as burlaps, tools, dead flowers, etc. so these can be prevented.

- The client usually likes to see a moist soil surface so; if possible, schedule the walk for the day after the water cycle has occurred. Caution: Be watchful for over watering and run-off, especially on sites with water allocation. Many clients object to large amounts of water on their parking surfaces. Although this could be a great opportunity to provide an enhancement proposal for an irrigation system upgrade.

- The day before the walk call or e-mail the client to verify time and location of the meeting just to make sure everything is still a go.

- See if they will have time to join you afterwards for a cup of coffee or better yet maybe you could go to lunch to help summarize what was covered on the walk.

Plan on Arriving Early and Possibly Staying Late

- Arrive a minimum of 15 minutes early for smaller jobs and up to an hour early for larger sites to finalize your thoughts and strategy and to check for and remedy minor issues. Trash and debris, broken limbs, broken sprinklers etc. should be dealt with before your walk.

- Arriving early shows the client you are prepared and recognize the importance of their time. Be early and never be late.

- If you are going to be late call the client and decide whether to start late or postpone the meeting based on time factors.

- If the client is late, 15 minutes is an appropriate period of time before checking in with them.

- Bring some material to work on (punch lists, goal review etc.) in case the client keeps you waiting.

- Remember that your time is important. If it doesn't look like the client will arrive within 30 minutes of the scheduled appointment consider rescheduling at a better time based on ***your schedule*** and the size and importance of the account.

Sit Down with the Client Prior to Going Outside (if you have this option)

- Review the purpose of the meeting and prioritize areas of discussion. Get client input and make any necessary adjustments.

- Get an idea of the amount of time they have allocated for this meeting and plan on staying within that time frame.

During the Inspection

- Walk at a comfortable pace.

- Keep the attire of the client in mind, taking care not to trek through muddy, wet or hazardous areas.

- Be sure to point out items that were completed from the previous walk through. Confirm satisfaction or make notes on any necessary adjustments.

- If a quality defect is encountered, acknowledge the defect and make notations. Don't be defensive! This can be perceived as a major negative.

- Make notations of non-contract problems (broken windows, painting needed, graffiti removal needed etc.) to aid the client in following up on other issues related to property management.

- Be careful not to make commitments until the inspection/walk is completed and priorities are agreed upon.

- Be sure to differentiate maintenance related items from extra work items.

- Take accurate notes with locations and approximate man hours needed to complete tasks. This will aid in scheduling work.

- Take good photos where needed to help document and to use with extra work proposals

- LISTEN to what the client is saying. This is a great time to find out what their special needs and expectations are with our service.

End of the Walk Through

- Try to schedule the walk to end either around 10:00 or near noon to allow the opportunity to sit down and have a cup of coffee or even have a lunch together. This gives you additional bonding time and helps with building the relationship process. Remember we are always trying to move from vendor to advisor to partner with all of our clients and this will help that along.

- Summarize the topics covered.

- Try to get a sense of priority and time frames for completion from the client's perspective.

- Be sure to separate maintenance items from extra work items.

- Review any extra work proposals and try for approval to proceed.

- If you are confident of the time frames and effort required, give approximate dates for completion of items. If you do not have a good handle on making time frame commitments ask permission to get back to them by a mutually agreeable date with a schedule. This option is usually safer and more reliable.

- Thank the client for their time and ask them; Are your completely satisfied with your service? If so great, if not, find out what is needed to have them completely satisfied.

- After you have said your goodbyes, return to the areas of concern or areas needing proposals and get an idea of what is needed to bring these areas up to meet the customer's satisfaction.

- Maintenance Items needing immediate attention should be noted with labor and materials needed to complete. For extra work items that are needed fill out an estimate form while it is still fresh in your mind and you are on site.

- Notify the appropriate field personnel and get a commitment for completion.

What are the top 3 items that need maintenance attention?
1. ____
2. ____
3. ____

What are the top 3 extra work items that need proposals?
1. ____
2. ____
3. ____

Follow-Up

Follow up is the key to a successful walk through. There are a few items to remember when following up after an inspection.

Answer the Client's Questions

- There are several questions that most clients will want to know the answers to: What are we going to do? Why do we need to do it? When are we going to do it? How much will it cost? Give the answers to these questions in written form via e-mail and ask for feed- back. Give multiple solutions with the benefits to the client's business.

Keep the Client Informed

- If we are researching information and it is taking more time than expected, let the client know the status. "I'm still working on it" is better than giving the impression we forgot or, worse, we don't care.

Provide Written Follow-Up Within One Week (or sooner)

- This will very on the situation and the intensity of the situation but follow up should be within a week on the outside and in 2 days would be better. Summarize the walk through notes; give expected dates for completion of maintenance punch list items and proposals for the extras that were identified. Photos are especially affective to show areas of concern.

Summary

Remember, ***PREPARATION, PRESENTATION and FOLLOW –UP*** are the key elements to a successful site inspection/walk through. By following these steps you will achieve greater client satisfaction and retention, be more proactive, increase sales for upgrades and resell the benefits of doing business with your company.