

Can your office act on the job without chasing the technician?

Choose one recent job. Tick each item only if the person preparing the quote or report can find it and knows what to do next.

Job reference: _____ Checked by: _____

☐**The right job and customer**

Customer, job reference and the right contact details are together.

☐**The request and the findings**

What the customer asked for is clear, alongside what the site visit found.

☐**Photos with context**

Photos belong to this job and show what the office needs to understand.

☐**Details and gaps**

Required measurements and details are recorded; unknowns are flagged.

☐**The current template and pricing**

The quote/report template and approved pricing inputs are available.

☐**An owner and an approver**

Someone owns the next step. Scope, price and technical approval are assigned.

☐**A record of what happens next**

The final version, customer reply and agreed follow-up have a place to live.

FIX ONE GAP FIRST

For an unticked item: where is it now, who supplies it, and what is the smallest change that would make the handoff reliable?

Missing item / where it lives: _____

Owner / smallest change: _____

Try a clearer job-note template, one required field or an explicit approval step first.

Bring one stuck handoff to a Free Workflow Review.

30 minutes with Qwikflo. Find a practical starting point.

Book your review at cal.com/qwikflo/free-workflow-audit