

SECOND ACT SYSTEMS

WALKTHROUGH FIELD CHECKLIST

A companion tool to The Commercial Cleaning Walkthrough System

Print this. Fold it. Take it into every walkthrough.

HOW TO USE THIS CHECKLIST

Work through these sections in order, from the day before your walkthrough to the moment you leave the building. Check off each item as you confirm it — an unchecked box is a gap in your bid, not a detail to fill in from memory later.

Section 1 — Before You Arrive (24-Hour Prep)

- Facility type researched and top three risk points identified
- Public square footage and floor count checked (treated as an estimate, not a final number)
- Decision-maker confirmed to be attending
- Outgoing vendor's scope of work requested, if available
- Walkthrough kit packed and checked (measuring tool + backup, flashlight, camera, checklist, business cards)
- Three to five facility-type-specific questions written down

Section 2 — Mindset Reminders

- Arrive to learn, not sell — aim for a 70/30 listening ratio
- Earn the frustration question with a few observational questions first, don't lead with it
- Treat every space as if you'll clean it at 11 p.m. with a two-person crew
- Assume nothing is “obviously” included in scope — if it's not written down, it's not in the bid

Section 3 — Facility-Type Quick Questions

- Office: What are the desk-side and after-hours access expectations?
- Medical / Dental: Do you have a written infection-control or biohazard disposal protocol?
- Industrial / Warehouse: What shifts run here, and is there ever a period when the floor is empty?
- Retail: Are there seasonal volume swings we should plan around?
- Educational: Are there vendor requirements — insurance, bonding, background checks — we should confirm?

Section 4 — Measurement & Layout

- Square footage measured or verified room by room, not from a single blueprint number
- Floor surface types identified separately (carpet, VCT/tile, concrete, specialty)
- Ceiling height and fixture/light density noted
- Traffic pattern observed during a normal business hour, not just after hours
- Layout complexity scored (open floor plan versus partitioned offices)

Section 5 — Restrooms & Break Rooms

- Fixture count recorded per restroom (toilets, urinals, sinks) — not just room count
- Partition material and condition noted
- Break room appliances and dishwasher (yes/no) checked
- Supply and consumables responsibility confirmed — who provides, who restocks

Section 6 — Access & Logistics

- Entry method confirmed (keys, fob, code, or escort) and who provides/activates it
- Alarm system responsibility confirmed — who arms/disarms, who to call if triggered
- Elevator access and loading dock / equipment entrance confirmed
- Parking arrangements for crew vehicles confirmed
- Noise restrictions or quiet hours asked about
- A real, after-hours contact name and number obtained

Section 7 — Red Flags Check

- Watched for signs of neglect from the previous cleaning company
- Listened for language signaling a difficult client relationship
- Noted any safety hazards
- Confirmed clear, unambiguous decision-making authority in the room
- Sorted any flags found: Cost Problem (reprice) or Relationship Problem (walk away)

Section 8 — Before You Leave

- Photos taken of every restroom, break room, floor condition, and any pre-existing damage
- Direct client quotes about expectations and frustrations written down
- Follow-up confirmation email sent within 24 hours, restating scope in writing

REMEMBER

This checklist works alongside the Facility Assessment Form, which is where you record the actual measurements, fixture counts, and details this checklist reminds you to capture. Use both together on every walkthrough.