

# Client Project Checklist

Client Name: \_\_\_\_\_

## Administration

- Contract Created and Sent
- Contract Signed
- Deposit Collected
- Initial Permit Drawing Created
- Pemrit Drawing Signed off
- Permit Forms Signed
- Permit Submitted
- Pool Deposit Paid
- Deposit info, payments, contract sent to Nancy
- Shipping Quote Received
- Locates Ordered
- Permit Received

## Operations

- Truck Packed
- Excavation Complete
- Base Complete
- Pool Installed
- Backfill Complete
- Plumbing Complete
- Pad Complete
- Equipment Installed
- Gas+Electrical
- Landscaping
- Equipment Start Up

## Planning

- Installation Date Chosen
- Equipment Ordered for Delivery
- Pool Ordered for Delivery
- Quebec Notified about Pickup date and Time
- Home Owner Notified about Pickup date and Time
- Preconsturction Meeting Set
- Crane Ordered and set

## Post Construction

- Pool School Complete
- Final Client Walkthrough
- Site Forms Signed
- Final Payment Collect
- Review Requested and Received
- Important Steps Sheet
- Manuals, Info Sent

## Pre Construction Meeting

- Walkthrough Presentation Completed
- Drawings w/ access, grades, and offsets signed off
- Grade stake + layout completed
- Before photos taken and set

## After Sales Service

- Closing and Opening Booked
- Winterizing Info
- Regular Updates
- Referall Program
- Service Notes

## Materials

- Gravel Measured and Ordered
- Bins/Dumps Ordered and schedules
- Machines Ordered for delivery

## Payment

- Payment 2 Received
- Payment 3 Received
- Payment 4 Received
- Change Orders Received

## Other

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